

**California-Nevada-Hawaii District of Kiwanis International
Treasurer-Financial Advisor Application**

Applicant _____ *(Please print all information)*

Address _____ **City** _____ **State** ___ **Zip** _____

Telephones: *(Cell)* _____ *(Office)* _____

(Home) _____

E-mail _____ **Kiwanis Club** _____

The California-Nevada-Hawaii District of Kiwanis International Bylaws require a special method of election for the office of Treasurer, who is elected for a one-year term and is also the financial advisor to the District Board of Trustees for Kiwanis and Service Leadership Program finances.

Applications must be submitted to the Cal-Nev-Ha Kiwanis District Office, attn.: District Secretary, 8360 Red Oak St., Suite 201, Rancho Cucamonga, CA 91730 and received not later than April 30.

1. Give a brief summary of why you are interested in this volunteer position.

2. Give a brief description of why you are qualified for this position. *(See Policy 192.2 below)*

3. Provide a summary of your education after high school.

4. What college degrees or awards, including community awards, have you received?

5. Provide a summary of your business and/or professional licenses and experience.

**California-Nevada-Hawaii District of Kiwanis International
Treasurer-Financial Advisor Application (continued)**

- 6. The District's Financial Policies are in Sec. 201-271, located at our website (www.cnhkiwanis.org). Should any be added, deleted or changed?

- 7. How long have you been a member of Kiwanis? ____Years. Summarize positions and/or committee memberships you have held:
 - a. Club:

 - b. District:

 - c. International:

- 8. I can fulfill the duties and responsibilities of Treasurer-Financial Advisor. __Yes __No

- 9. I can fulfill the time requirements for the office of Treasurer-Financial Advisor. __Yes __No.
I acknowledge that these time requirements do not include club, foundation or other activities.

- 10. I acknowledge that any successful applicant will be bonded and subject to both criminal and civil background checks. __Yes __No.

Dated: _____ Signature Pete Horton
(See position description and policies)

California-Nevada-Hawaii District of Kiwanis International Treasurer-Financial Advisor Position Description & Policies

The District Bylaws provide that the Treasurer has the duties and responsibilities to:

- Be and carry out the duties and responsibilities of an officer, a member of the Board of Trustees and the Finance Committee, and a delegate-at-large at District conventions.
- Regularly review and advise the District Board of Trustees on the financial condition of the District and its sponsored organizations, and shall be the Financial Advisor as defined in District Policies.
- Make a report at the annual District convention.
- Perform such other duties and responsibilities as usually pertain to this office or as the Governor or the District Board of Trustees may assign.
- Give a bond for the faithful discharge of the duties of the office, in such amount and with such sureties as are required by the District Board of Trustees.

Estimate of Time Requirements to Serve as Treasurer and Financial Advisor:

The amount of time required serving as Treasurer and Financial Advisor will depend primarily on the background and ability of the applicant. *In addition to travel time*, applicants should estimate that the minimum amount of time would include:

- An average of one or two-days monthly in the District office reviewing income, expenses, supporting data and comparisons to budget for the District and sponsored organization finances.
- Additional time is needed for conventions, budget preparation and Board of Trustees, Finance, forward planning and audit committee meetings, and meetings with the auditor.
- Preparation of Treasurer reports to the Board and convention.
- Time is needed at home to approve District and sponsored organization vouchers and determine compliance with their budgets. Direct home access to some financial records may occur.
- For new Treasurers, additional district office days are needed for familiarization with the accounting system, books, records, financial data, etc.

The District Policies, Section 192 to 192.2 further define the duties, responsibilities and qualifications of the Treasurer and Financial Advisor:

192 Treasurer and Financial Advisor Position Description/Responsibilities (02/06)

The Treasurer shall be the Financial Advisor (“FA”) for the District, and will advise the Board on all financial matters with particular emphasis on continuity of planning and execution of sound financial decisions.

192.1 The Treasurer and FA will work with the District staff and external auditor and have the following responsibilities:

- A. Shall report directly to the Board
- B. Be a member of the finance committee
- C. Provide the direct link between the Board and staff on financial matters
- D. Provide the direct link between the Board, the audit committee and the external auditors

**California-Nevada-Hawaii District of Kiwanis International
Treasurer-Financial Advisor Position Description & Policies (continued)**

- E. Develop understanding of and advise the Board on the significant operations conducted by the District, the financial environment, significant internal controls and financial reporting procedures
- F. Is willing to serve as a volunteer, without salary, and with an expense account as approved in the annual district budget
- G. Is willing to serve for a one-year term and may be re-elected for not more than three additional one-year terms. A Treasurer appointed to fill a term of less than one-year, may fulfill that term in addition to the four-year maximum

192.2

Qualifications

The Treasurer and FA should have the qualifications and experience necessary to effectively carryout the job requirements. The position shall be open to all Kiwanis members regardless of locale. Qualifications include:

- A. Possess business acumen sufficient to understand and advise regarding the operations and financial reporting of the District
- B. Have an appreciation of the importance of timely and accurate financial reporting
- C. Have the highest integrity and ability to communicate the importance of fair and accurate financial reporting, including accounting estimates
- D. Understand generally accepted accounting principles as applied to the District and non-for-profit organizations
- E. Understand internal controls and financial reporting procedures applicable to the District and non-for-profit organizations
- F. Have the experience with and/or understanding of the external audit function and board audit committees
- G. Be a member of a Kiwanis Club in the California-Nevada-Hawaii District

The following experience or the equivalent would be acceptable:

1. Certified Public Accountant
2. An individual currently or previously engaged in the field of public accounting
3. Service as chairman of the audit committee of a business or large not-for-profit organization
4. Service as chief financial officer, treasurer, controller and/or senior accountant of a business or large not-for-profit organization
5. An entrepreneur with good business acumen and experience dealing with external auditors in the conduct of his/her business