

PARISH FINANCIAL SERVICES NEWSLETTER

Volume: 11, Issue: 6



Farewell Ed Williams!

It's hard to believe that 25 years ago I was reading Tom Jessup's good-bye in the then *Parish Accounting Newsletter*. At the time I thought this would be maybe a three year experiment to see if I could become an accountant again after a long time in other occupations. I also really didn't know what to expect working for the Church. The accountant question is probably still open but I quickly found out there were some very sharp people both in the Chancery and parishes. It has become a cliché to say the people made the job good but in this case it is completely true. PFS, and really the Archdiocese, wouldn't be the entity it has become without all of you. Thanks for making

this a great run and I know Scott will continue to make Parish Financial Services your first phone call.— Ed

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Emailing Withdrawal Requests reminder

Occasionally, I get PRF withdrawal requests via e-mail with no one copied. This can be a little dangerous especially when there is some time constraint on the withdrawal. If you want the PFS Director to be aware of the request that's fine but you should always copy Loretta (loretta.griffin@seattlearch.org) and Justin (justin.schrier@seattlearch.org) and preferably our PFS shared e-mail.—Ed

Annual Signing Authority Forms

Archdiocesan Policy requires annual reporting of your delegation of authority to sign PRF transactions, insurance transactions, etc., or of your decision not to delegate this authority. Please note that you should return the Signing Authority Form even if you are not delegating this authority so we have a sample of your signature on file. Please see the attached form or you can download the form from our website: <http://www.seattlearchdiocese.org/Archdiocese/PFS/forms.aspx>

Look out for the 2014-2015 Insurance Billing

The insurance billing for next year will be sent out by the end of this month. Please check the billing thoroughly for accuracy and if you have any questions/concerns contact Emily Lee at (206) 382-7316 or emily.lee@seattlearch.org. Remember, if you pay in full by July 25th you receive a 5% discount, or if paid by August 25th you receive a 2% discount. Beginning October 1st, finance charges of 1% per month on the unpaid balance will be charged.

Parish Annual Report 2013-2014

It's June, and that means it is time to begin the Parish Annual Report for 2013-2014!

It's a great time to get a head start, so start now!

The Parish Annual Report 2013-2014 is available to download from the Archdiocese of Seattle Website Now!

<http://www.seattlearchdiocese.org/Archives/PAR.aspx>

The PAR is due Friday, August 15, 2014

As always, we recognize that this can be a challenging project and we want to be of assistance.

If you should have any questions or concerns, please contact

Liz Madsen in the Chancellor's Office

**Archdiocese of Seattle
710 9th Ave
Seattle, WA 98104**

**Phone: 206-654-4655
Fax: 206-274-3110
Email: elizabeth.madsen@seattlearch.org**

CMG: Special Events Applications

A reminder from Catholic Mutual: When completing the **Application for Special Events**, please double check the following:

- All the lines are filled in and printing is legible.
- Specify "**a.m**" or "**p.m**" when listing the time of the event
- Estimated number of attendees

Missing information could mean a delay in processing while we track down the information. If you have any questions about Special Events or the application, please do not hesitate to contact our office: (206) 382-3494



Have you reached goal yet? Yes or no? See below!

If you've reached goal, do you want to maximize your rebate? Yes? See below!

FOLLOW-UP by continuing to ASK throughout June at ALL Masses and send out the final pastor follow up letter to those who gave last year but not yet this year. (refer to ACA manual)

Continued "Asks" from you are CRITICAL for your success!

Remember, when you stop asking, your parishioners will stop thinking about it. Keep asking until you surpass your goal!

Encourage all to participate and remember, the \$1 a day/\$365 "ask" works!

To date, we are over ONE MILLION DOLLARS just in the donors who have given \$365.

THANKS FOR ALL YOU DO!

We are here to serve and help you – call us if you need assistance:

Maggie Stiles: 206-382-4274 or Monica Lewis: 206-382-4353 or Toll Free: 800-809-4921



PARISH STEWARDSHIP

Yearly Commitment Renewal Materials

The order site is open. Please order your materials as soon as you can.

Access the order site at:

<http://clients.printwest.net/customers/seattlearchstewardship/>

Choose your parish from the drop down menu

Password is: ps2014

Don't find exactly what you need? We are here to help you. Just email: parishstewardship@seattlearch.org, tell us what you would like and we'll do everything we can to make it happen!

ARCHDIOCESE OF SEATTLE

PARISH FINANCIAL SERVICES

710 9th Ave
Seattle, WA 98104

Phone: (800) 422-5417
Fax: (206) 382-4279
parishfinancialsvcs@seattlearch.org

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(206) 382-7316
emily.lee@seattlearch.org

Ed Williams: Director of PFS
(206) 382-4585
edw@seattlearch.org

Sarah Diama: Assistant Director of PFS
(206) 382-4573
sarah.diama@seattlearch.org

Loretta Griffin: Savings & Loan Manager
(206) 382-4501
lorrettag@seattlearch.org

Justin Schrier: Savings & Loan Accountant
(206) 382-4845
Justin.schrier@seattlearch.org

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PARISH FINANCIAL SERVICES

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710 9TH AVE
SEATTLE, WA 98104-2017
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June 18, 2014

Dear Pastor, Priest Administrator, Pastoral Coordinator:

Archdiocesan policy requires annual reporting of your delegation of authority to sign PRF transactions, insurance transactions, etc., or of your decision not to delegate this authority. Please note that you should return the appropriate form even if you are not delegating this authority. This is to provide us with a sample of your signature.

In completing the forms, please be sure to indicate which accounts or transactions are authorized and any restrictions you want to place on the delegation.

The completed forms should be returned to **Parish Financial Services** as soon as possible but by **September 1, 2014** at the latest. If you have any questions regarding the policy, please feel free to call me at (206) 382-4585 or (800) 768-7986 or e-mail me at edw@seattlearch.org.

Thank you for your cooperation.

Sincerely,

Ed Williams
Director of Parish Financial Services

ac:ew

attachments

**ARCHDIOCESE OF SEATTLE
ANNUAL SIGNING AUTHORITY**

Date: _____

Parish Name: _____ City: _____ ID# _____

Note: Please complete either Section A or B.

**SECTION A
AUTHORIZED SIGNATURE**

I am not delegating signing authority at this time:

(Please Print your Name)

Signature

Date

**SECTION B
NOTICE OF DELEGATION OF SIGNING AUTHORITY**

I have authorized the following staff member(s*) to sign for the parish:

(Print or Type Name & Title)

(Signature of Appointee)

(Print or Type Name & Title)

(Signature of Appointee)

This authorization includes PRF savings and loan withdrawals, Archdiocesan insurance transactions (adding or deleting properties or vehicles), leases involving parish owned properties, and all contracts with the following exceptions and/or restrictions: _____

*If more than one signer is appointed, please indicate the number of signers required for transactions (ie. 1 or 2).

This authorization is valid until further notice.

(Signature)

(Date)

**SECTION C
AUTHORIZED REVIEWERS**

I authorize the following individuals to request/receive PRF/ARF transaction information and account balances:

1. _____ 2. _____ 3. _____

(Please Print your Name)

Signature

Date

Chancery Approval:

(Signature)

(Date)

**ARCHDIOCESE OF SEATTLE
TEMPORARY TRANSFER OF SIGNING AUTHORITY**

Date: _____

Parish Name: _____ City: _____ ID# _____

During my absence from the Parish, I have authorized*:

(Print or type Name and Title)

(Signature of Appointee)

(Print or type Name and Title)

(Signature of Appointee)

(Print or type Name and Title)

(Signature of Appointee)

*If more than one signer is appointed, please indicate the number of signers required for transactions (ie. 1, 2 or 3).

This authorization includes PRF savings and loan withdrawals, Archdiocesan insurance transactions (adding or deleting properties or vehicles), leases involving parish owned properties, and all contracts with the following exceptions and/or restrictions: _____

This authorization is valid from _____ to _____
(beginning date) (ending date)

(Signature)

(Date)

Chancery Approval:

(Signature)

(Date)