



PARISH FINANCIAL SERVICES NEWSLETTER

July 2014

Welcome Scott Bader!

I am excited to step into the job of Director of Parish Financial Services, and hope to continue the good work that Ed Williams has done for these many years, serving our parishes. It is a privilege to try to fill Ed's shoes, and I'm sure you all join me in thanking him for all he has done. It is an honor to be working with all of you – I am grateful that I get to continue doing so after 19 years as Director of Parish Stewardship.

Ed put together a great team of Emily, Justin, Loretta, and Sarah and I know they'll help me navigate the challenges that come with any change. Please don't hesitate to let me know how I can help you or if I'm not providing your parish with what you need from P.F.S. I'm passionate about wanting our parishes to succeed & hope that in my time as Director of Parish Financial Services all our parishes will be able to go further in carrying out the mission Christ gave to the Church. -Scott

Annual Signing Authority Forms

Thank you to those that have already turned in your Annual Signing Authority Forms. Archdiocesan Policy requires annual reporting of your delegation of authority to sign your PRF transactions, insurance transactions, etc., or of your decision not to delegate 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 time frame for temporary authorizations (Please do not fill the temporary form out if you have filled out the standard authority form)

The completed forms should be returned to **Parish Financial Services** by **September 1, 2014**.

We have attached the form or you may download it at:

<http://www.seattlearchdiocese.org/Archdiocese/PFS/forms.aspx>

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Send in Original PRF Withdrawal Request Forms

Just a reminder to mail in the Original Hard copies of PRF withdrawal/transfer request forms. We gladly accept faxed withdrawal requests to aid in receiving funds and transfers needed in a timely manner, however our auditors require signed originals on file. Please help us continue to provide the fax-in option by mailing the original hard copy after you have faxed it to us; this really is important. Any questions, concerns, follow up on withdrawals or PRF loan and savings questions, please contact us: Loretta Griffin (206) 382-4501 lorettag@seattlearch.org

Justin Schrier (206) 382-4845 justin.schrier@seattlearch.org

Parish Annual Report

LET'S GET STARTED!

It's July and that means it's time to start working on the Parish Annual Report for 2013-2014.

The report is available for download from the Archdiocese of Seattle website now. Go to:

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

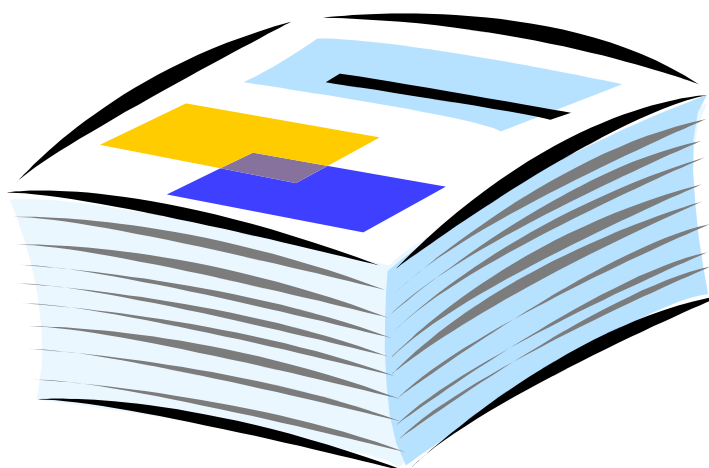
The PAR is due Friday, August 15, 2014

Questions?

Please Contact:

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Chancellor's Office
Archdiocese of Seattle
710 9th Ave
Seattle, WA 98104

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



ARCHDIOCESE
OF SEATTLE

Insurance Program Changes

As you know, effective July 1, 2014, we changed insurance carriers and programs. Arthur J. Gallagher & Co. is now the broker for all coverages. We are trying to make this transition as seamless as possible but it is a major change.

By now you should have received new contact information for Judy Graf and Stephen Erni (our Gallagher contacts) as well as a link to the TULIP program (Gallagher's version of the CMG Special Events Coverage) and a form to request Certificates of Coverage. This information has been added to our (PFS) website: <http://www.seattlearchdiocese.org/Archdiocese/PFS/forms.aspx>

If you have not used it yet, the TULIP program is an online procedure that accepts credit cards. Normally, the individual using your facility will fill the application out online, pay with his/her credit card and bring you the certificate that it produces. The cost will usually be somewhat higher than the old policy but I think the added convenience will make life much easier for you as Parish staff.

If you had Special Events Coverage applications in process or approved prior to June 30, here is a summary of what has been done:

- * Events scheduled for July were transferred to TULIP and are covered.

- * Applications for events scheduled after July were returned to the parish office and either the parish check was returned or a refund check was issued. You or the applicant should complete the new TULIP application online (<https://eventus.ajgrms.com>). If you have not received the CMG applications, please call me and we will try to trace them.

We will be getting revised Facilities Use Guidelines and Facility Use Agreements on the website shortly. If you need one before it hits the web, please contact Ed Foster in Property and Construction Services.

You also probably know that I will be here until the end of September as Interim Insurance Program Manager. My new phone number is 206-382-4529, e-mail remains the same. If you have insurance questions or comments, please let me know. I am in the office Monday through Wednesday.

As I said above, this is a major change and we appreciate your patience as we try to tie up all the loose ends that are always out there.

Ed Williams

Interim Insurance Program Manager 206-382-4529; edw@seattlearch.org

GALLAGHER CONTACTS:

Certificates of Insurance, Auto ID Cards, Changes in Vehicles, Drivers or Property Values

Contact: Stephen Erni 425-586-1002/888-626-6775 Stephen_Erni@ajg.com

Property Use Questions and Contract Review

Contact: Judy Graf 425-586-1044/888-626-6775 Judy_Graf@ajg.com

Vehicle, Property and Liability Claims

Sedgwick Claims Management Services, Inc

866-471-9518 FAX: 503-412-3990



Rebate Checks

If your payments have exceeded your goal, you can expect your first rebate check in mid-August!

A check this early indicates your pledge fulfillment is proceeding nicely!

Note: Continue to send discrepancies or omissions you find on your donor report as these can affect rebates – send an email to maggies@seattlearch.org and include parish name and ID, donor name, Arch ID# if known and description for research.

Matching Gifts

We encourage you to educate your parishioners on how to maximize their gift to the Annual Appeal with a matching gift. Please consider putting this in your bulletin and/or on your website, at minimum, on a monthly basis:

Thank you to those who have already fulfilled their pledge! If you would like to help maximize our Annual Catholic Appeal Rebate this year for our parish project, please check if your employer has a **Matching Gift** program. Once your gift has been paid in full, you can apply for the match per your employer's instructions. The Annual Catholic Appeal, Archdiocese of Seattle, is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code. Tax ID # 91-0778147. Call 206-382-4274 if you have any questions. Mailing address: Annual Catholic Appeal, PO Box 14964, Seattle 98114

Parish Updates

Although Joy Eugenio is longer with us, continue to send us your parish update information, especially deceased parishioners, to parishupdates@seattlearch.org

From the Office of Stewardship & Development

The Office for Stewardship & Development is excited to announce a new addition to our team!

We are very excited to have Steve Homiack join us as the new Director of Parish Stewardship as of Thursday, July 10th. Steve comes to us with 10 years experience as a Pastoral Administrator for Administration - most recently Holy Cross-Lake Stevens, St. Mary- Marysville and St. Anne Mission-Tulalip. Please join us in welcoming him!

Save the date! New PAA Training Session: October 15, 2014

We will no longer be offering the five Autumn-Winter sessions. Please stay tuned for more information and registration forms in our upcoming newsletters.

ARCHDIOCESE OF SEATTLE

PARISH FINANCIAL SERVICES

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Seattle, WA 98104

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Director of PFS

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Scott.bader@seattlearch.org

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Assistant

Director of PFS

(206) 382-4573

sarah.dama@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

Emily Lee:

Office Coordinator/Database Specialist

(206) 382-7316

emily.lee@seattlearch.org

**ARCHDIOCESE OF SEATTLE
ANNUAL SIGNING AUTHORITY**

Date: _____

Parish Name: _____ City: _____ ID# _____

Note: Please complete ONE Section only. 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# _____

Note: If you completed Sections A or B you DO NOT NEED TO FILL OUT THIS FORM

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)