

Auditor Additions

Auditors should be preparing for the final audit of their current fiscal year – start collecting data now to reduce your workload after the year ends. If you use Google Drive or something similar, you can create a shared folder to collect treasurer reports, meeting minutes, bank statements, account reconciliations, and other data identified in the Audit Checklist. If there were recommendations from the first audit period, you should be checking up on how those are being implemented.

Presidents, if you don't currently have an elected or appointed auditor, now is the time to be looking for one, and you also need to appoint an audit review committee. The review committee can be as small as the auditor as chairman and one other member. If you are uncertain about the requirement for the jobs, the duties are described in the *California State PTA Toolkit*, page F11.

You can find the Audit Report, Audit Checklist, and the Ninth District Audit Worksheet forms at <https://www.ninthdistrictpta.org/pta-leaders/forms/>, along with the Finance Toolkit for reference.

##