

Finance Committee Report

The Finance Committee has been very diligent in the completion of goals developed in August of 2021.

- Reimbursement Policy was revised and approved
- Investment Policy was revised and approved
- Voucher form was streamlined
- Budget for 2022-2023 has been prepared for OSO approval
- Met with Accounting firm (Anderson-Kurtz Financial Services LLC) to review the year's financial statements
- Met with financial advisors to secure a firm to represent OSO (May 2022)
- Prepared a recommendation for Investment Group (RBC Wealth Management)
- Reviewed Bylaws with suggested amendments (May 24, 2022)

Items to be approved:

- Budget (review first)
- Recommendation for RBC Wealth Management to represent OSO investments.

Respectfully submitted by:

Cathy Adams, Alpha Gamma

Meier Bauer, Gamma Phi

Michele Koenig, Gamma

Diana Haskell, ex officio, Gamma Phi

Helenlu Morgan, Beta Alpha, Chair