



# DELTA CHI

FRATERNITY

## Member Resources

### ABT Financial Advisor Position Description



#### The ABT Financial Advisor should....

- Support and work with the chapter/provisional chapter "D"
- Help the chapter/provisional chapter prepare budgets in advance for each school term and ensure they are brought before the ABT for approval
- Conduct monthly budget checks so individual categories are not overspent
- Support the "D" for prompt payment of bills
- Read and familiarize yourself with BRIEFS and resources regarding financial management
- Educate the chapter/provisional chapter on appropriate fiscal responsibility
- Support the "D" in maintaining good financial records
- Provide advice on the management of idle funds
- Advise the chapter/provisional chapter on methods of collecting dues
- Provide advice on fundraising and fundraising campaigns
- Review the chapter/provisional chapter financial records once a month to ensure accuracy
- Assist in the collection of delinquent accounts
- Assist in the documentation for tax purposes and IRS review
- Work with the "D" so that Form 990 is filed with the IRS
- Review the chapter/provisional chapter's financial status with the "D" (monthly) and ABT members
- Work and meet with the chapter/provisional chapter's accountant (if applicable)



#### Important resources include:

- Delta Chi Law
- ABT BRIEF
- ABT by-laws
- Chapter/provisional chapter by-laws
- Financial Management BRIEF
- Delta Chi Volunteer Resources, including participation in the Volunteer Training Program available through the International Fraternity