



## **ABT TREASURER/FINANCIAL ADVISOR DUTIES:**

### **ADVISING AND SUPPORT**

- Serve as Treasurer of the Alumni Board of Trustees, maintaining all financial records.
- Keep and maintain the ABT budget.
- Directly advise the “D” of the undergraduate chapter and support general chapter financial operations and procedures, including the collection of dues and management of funds.
- Meet monthly with the “D” to review chapter financial records for accuracy.
- Support the “D” to prepare chapter budgets in advance of each school term (semester/quarter) and ensure they are brought before the ABT for approval.
- Understand all deadlines and filing requirements of the chapter, including ensuring that the Form 990 is filed with the IRS in advance of the chapter’s tax filing deadline.
- Maintain contact with the Vice Regent and the International Headquarters.

### **ADMINISTRATIVE OVERSIGHT**

- The ABT Treasurer is a suggested position within the establishment of an Alumni Board of Trustees, but is critical to its success and function.
- Work with the chapter to ensure that they are achieving Delta Chi minimum standards.
- Provide guidance to operations as prescribed in Delta Chi Law related to financial powers, academic standards, recall of officers, and membership status or expulsion.
- Complete the Advisor & Volunteer Training onboarding modules in the Learning Management System (accessible via MyDChi).
- If available, attend the January Regional Leadership Academy event or support chapter member attendance and minimum required delegation size.
- Support member completion of the annual Membership Experience Survey.
- Support the submission of the Mid-Year Chapter Operations Assessment and the Chapter Operations Assessment and International Headquarters Awards submissions.