

Q – Is QuickBooks required for branches?

A. – No, both QuickBooks and Quicken are handy tools for automating some of the aspects of financial record keeping, but each branch must find a solution that works for them.

### **Shape The Future**

Q. – What is the coupon code for new members joining using Shape the Future? Is the listing of the number of free memberships available being updated?

A. – It is STFFY26 (and was incorrect on the slide presented during the Peer Group). It has been corrected on the version posted. The listing of free memberships earned this fiscal year should be posted soon by National.

### **Proposed State Dues Increase and Membership Renewals**

Q. – When will the proposed state dues increase become effective?

A.- Voting on the proposed increase began on April 26 and will continue until mid-May. If the measure passes, it will be implemented as soon as it can be incorporated into the HUB. Stay tuned for updated information.

Q. – Can reminders for dues be sent by national to only a subset of a branch's membership?

A. – No, A branch needs to elect to have national reminders sent to all members.

### **Permanent Records**

Q. - Can you repeat how to obtain a copy of the 990-N filed by national?

A. – This information is on slide 23 of the power point presentation:

- Tax exempt organization – search for a copy of the branch IRS Determination Letter or copies of past 990 series or Postcard 990-N:
  - <https://www.irs.gov/charities-non-profits/search-for-tax-exempt-organizations>
  - <https://apps.irs.gov/app/eos/>



## Questions and Answers from Finance Peer Group – April 3, 2025

Q. - What are suggestions for maintaining permanent records, such as the IRS determination letter, Articles of Incorporation, etc.?

A. – Some branches are using Google Drive or Drop Box for maintaining files. Safety Deposit boxes were also mentioned.

### Support for New Finance Officers

Several branches mentioned the use of co-treasurers, and having a new person “apprentice with an ongoing treasurer”. You can also reach out to other current finance officers.

If you want to contact other branch treasurers/finance officers, go to the State Directory of Branch Leadership on the AAUW CA website at <https://www.aauw-ca.org/state-directory-of-branch-leaders/> If you know the name of the branch finance person you want to talk to, enter the person’s last name to get the contact information. If you don’t know the name, 1) select or type in the branch name and then 2) select Finance in the branch position drop-down box. The name and contact information of the branch finance officer will be shown.