



VFW Auxiliary

2020 New Department Treasurers Training



Unwavering Support for Uncommon Heroes tm



VFW Auxiliary

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VFW Auxiliary

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VFW Auxiliary

Membership Email

membership@vfwauxiliary.org

We ask that all membership requests are submitted through the email address above. This is a central location so we can access all membership records quickly and with ease.

We are also implementing a new phone system to get the caller to the correct team member quickly.

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VFW Auxiliary

TOPICS

- ☐ Duties of Treasurer
- ☐ Budgets
- ☐ Gifts
- ☐ Bonds
- ☐ Tax & Miscellaneous Items
- ☐ Membership
- ☐ MALTA Website



VFW Auxiliary

- Is the former Department Treasurer assisting with the transition?
- Is your Department changing bank accounts?
- Address and phone number on file correct?
- Inheriting an e-mail address? – change password
- All notifications go to the e-mail address on file. If change e-mail address, notify HQ immediately
- Month-end is always last calendar day of each month (no exceptions)
- Dues can be entered until 11:59 PM Central time to be counted towards the days business



VFW Auxiliary

Treasurer, Duties of (All Levels) (Sec 813)

- ▣ Treasurer of all committees handling funds
 - ▣ What about hospital chairpersons?
- ▣ At the end of their term of office transfer all paper, books, money, & other property
- ▣ All funds shall be accounted for by the Treasurer in the VFW Auxiliary books, which consist of:
 - Ledger
 - Cash book
 - Or computerized system



VFW Auxiliary

Treasurer, Duties of (All Levels) (Sec 813)

- ▣ Must be printed and secured in a permanent record book
- ▣ Collects all money due
- ▣ Gives receipt for all cash
- ▣ **Submits all forms necessary to be in compliance with Federal & State regulations**
 - ▣ **Tax exempt status compliance**
 - ▣ **Ensure name has been changed with IRS!**



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

- ▣ Receive & properly account for all money due and payable to the Department and National Headquarters
- ▣ Give a written receipt for all money other than checks received
- ▣ Shall be the official accountable Officer of the Department and in their care shall be placed securities, funds and the accountable property of the Department



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

- ▣ Expend Department funds only:
 - As approved by the C of A in the annual budget
 - As approved by the C of A in Department Standing Rules
 - With proper expenditure voucher with bill attached
 - Expense shall be within the budget
 - Have approval of the Department President (may be done electronically via e-mail)
 - Per vote by the C of A

- ▣ Vouchers shall be:
 - Numbered in sequence
 - Reasons for expenditures shall be itemized in detail
 - The recipient of payment shall be designated clearly



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

- ▣ Shall furnish the President with a monthly financial report of revenue and expenditures (a.k.a. Income Statement, Profit / Loss Statement, Statement of Activities)
- ▣ Shall maintain all membership applications from Auxiliaries within the Department in the application file until the member has been deceased for a period of six (6) years or has reached 120 years of age. **This file may be kept electronically.**



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

▣ Shall audit Report Forms & Dues Payments

- Observe that necessary & correct data is shown
 - Membership Applications
 - Missing information?
 - Relationships to veterans?
 - Eligible combat ribbons and medals
 - NOT ELIGIBLE - National Defense Service Medal (NDSM)
 - NOT ELIGIBLE - WWII Victory Medal
 - Communication with Auxiliaries is key!
 - Too much / too little money
 - What should you do?



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

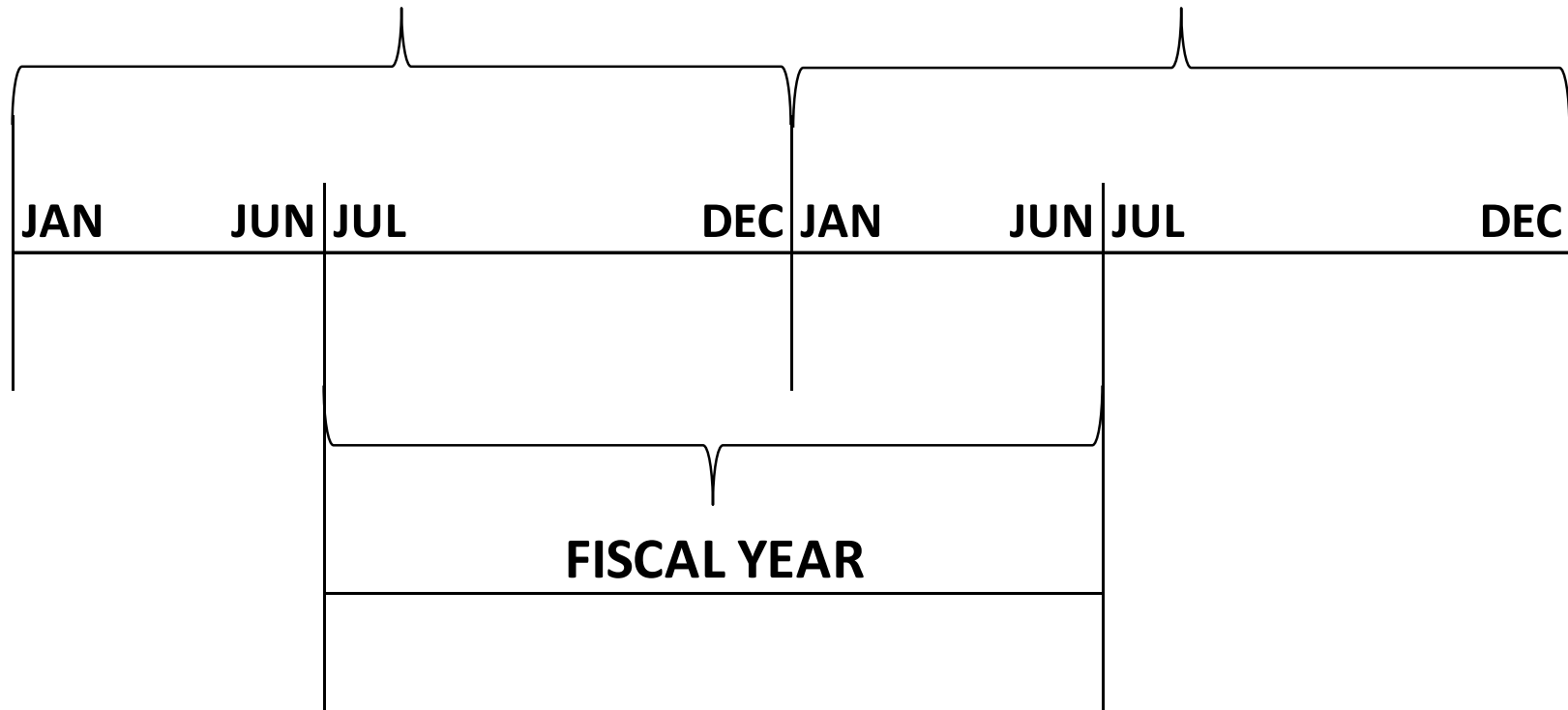
- ▣ Shall set up and maintain a dues reserve fund to which shall be credited not less than fifty percent (50%) of all current year's dues received prior to July 1
- ▣ Shall not disburse nor obligation be incurred against this fund until after July 1, at which time all money shall be transferred to the Department General Fund for expenditure



VFW Auxiliary

CALENDAR YEAR 2020

CALENDAR YEAR 2021

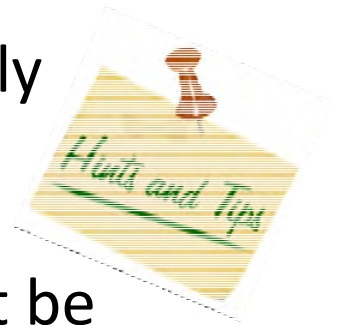




VFW Auxiliary


Duties of Dept. Treasurer (Sec. 813C)

- ▣ National dues & all of the money belonging to the National Headquarters shall be placed in a separate account in the General Fund *(what does this mean?)*
 - In no instance shall it be expended or used for any other purpose than its proper remittance to the National Treasurer
 - All funds shall be remitted to National promptly
 - To disburse National funds, vouchers may be approved at a later date
 - Any discrepancies in the total remittance must be carried in the Department's General Fund (budget for errors and omissions!)





VFW Auxiliary

VFW Auxiliary Treasurer's Book To Post No. 99999					The CASH BALANCE must equal the total of the FUND BALANCES						
					↓						↓
					CASH BALANCE	FUND BALANCES					
					\$ 737.00	\$ 395.00	\$ -	\$ 342.00	\$ -	\$ 737.00	
				<i>Only Negative #'s</i>	<i>Only Positive #'s</i>						
Reference	Date	Description of Transaction	Debit (-)	Credit (+)	Cash Balance	C	General Fund	Nat. & Dept. Dues Fund	Relief Fund	_____ Fund	TOTAL
	#####	Beginning Balance			692.00		300.00		392.00		692.00
1033	#####	VFW National Home for Children	(50.00)		642.00				(50.00)		(50.00)
Deposit	#####	Deposit, Bake Sale		75.00	717.00		75.00				75.00
1034	#####	VFW Dept of ____, Dist. No. ____, Dist. Dues	(25.00)		692.00		(25.00)				(25.00)
Deposit	#####	Deposit, Membership Dues Received		50.00	742.00		30.00	20.00			50.00
EFT	#####	MALTA, Membership Dues Paid	(20.00)		722.00			(20.00)			(20.00)
ACH Dep.	#####	MALTA, Membership Dues Received		45.00	767.00		45.00				45.00
EFT	#####	MALTA, Bond Paid	(30.00)		737.00		(30.00)				(30.00)

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Duties of Dept. Treasurer (Sec. 813C)

- ▣ Shall prepare consolidated report covering in detail all membership summaries and dues payments as received (*old paper way of transmitting dues*)
 - Shall forward the same together with the proper remittance
- ▣ Shall be bonded with:
 - Sufficient security in a **sum to be approved by the Council of Administration**
 - The cost shall be paid from the Department Treasury
- ▣ Books shall be open to inspection by the Council of Administration, & Auditing Committee or a Certified Public Accountant employed by the Department



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

- ▣ Shall prepare detailed financial report of all transactions since the last meeting
 - Printed and distributed to each Council Member at each Council of Administration meeting (no motion is required to accept this report)

- ▣ Shall publish the financial statements in the Department Convention report book
 - Report book to be distributed to the Delegates at the Department Convention



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

- ▣ Shall maintain a file of the Audit Reports from each Auxiliary, County Council, and District within the Department for 1 year (rotating year!)
 - Notify the Department President with any concerns regarding the audits
 - Forward list of delinquent Auxiliaries, County Councils, and Districts or a notice stating all Audit Reports have been received from all organizations to the Department Convention Credentials Chairman
 - Copy of the notice or list of the delinquent organizations also sent to National HQ within five (5) days following Department Convention



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

- ▣ Shall immediately following the close of the fiscal year submit the approved year-end audit report to the National Treasurer (no later than October 1st)
 - ▣ May request an extension. The request would go to the National President via the National Secretary – Treasurer, via the Director of Accounting (send request to George)

- ▣ Shall prepare a *tentative* budget for financial operations for the ensuing year
 - Shall prepare a budget that sets forth all estimated receipts and anticipated expenditures for the use of the Budget Committee in preparing the *proposed* budget
 - Restricted funds shall be budgeted separately in every instance
 - The budget shall be in balance
 - Copy of proposed budget submitted in writing to the Department Council of Administration for adoption
 - When adopted, the budget shall control expenditures of the Department
 - Once the Council of Administration approves the budget it cannot be changed
 - Copy of the approved budget forwarded to the National Treasurer (no later than October 1st) (This can be done electronically!)
 - May request an extension. The request would go to the National President via the National Secretary – Treasurer, via the Director of Accounting (send request to George)



VFW Auxiliary

Duties of Dept. Treasurer (Sec. 813C)

- ▣ Shall prepare a Budget report:
 - Showing current balance of each account quarterly or prior to each Council of Administration meeting
 - Prepare the final Budget report covering the full fiscal year (July 1 to June 30)
 - Copy of Budget reports shall:
 - Be given to each member of the Council of Administration
 - Be given to each member of Budget Committee
 - Presented by the Budget Chairman to the Council



VFW Auxiliary

Budget Tips for Treasurers

- ▣ Have separate line item under revenues for miscellaneous revenues
 - ▣ Even if the amount budgeted is zero, this will allow a Treasurer to record revenues during the fiscal year that do not fit into any other revenue category
- ▣ Have separate line item under expenses for miscellaneous expenses
 - ▣ Even if the amount budgeted is zero, this will allow a Treasurer to record expenses during the fiscal year that do not fit into any other expense category





VFW Auxiliary

Budget Tips for Treasurers



- ▣ When giving a budget report, it is not necessary to read each line of the budget
- ▣ When giving a budget report it is suggested to report on the following:
 - ▣ Any large discrepancies between budgeted and actual amounts
 - ▣ Revenues are much lower or higher than expected
 - ▣ Expenses are much lower or higher than expected
 - ▣ Any foreseeable expense overages and request approval from the Council of Administration for the overage



VFW Auxiliary

Department Treasurers

- ▣ Are not to be members of the Convention Credentials Committee (Section 606A)
- ▣ Should cooperate with the Audit Committee
- ▣ Shall prepare a tentative budget for Budget Committee to create a proposed budget
- ▣ Treasurer should not be chairman of Budget Committee
- ▣ Department dues shall be established only at the Department Convention
 - Department cannot levy any other compulsory dues



DEPARTMENT OF _____
 PROPOSED BUDGET 20XY - XZ

<u>REVENUE:</u>	<u>BUDGET</u> <u>20XX-XY</u>	<u>ACTUAL</u> <u>20XX-XY</u>	<u>PROPOSED</u> <u>BUDGET</u> <u>20XY-XZ</u>
Department Dues Transferred July 1 from Dues Reserve	\$19,500.00	\$19,500.00	\$19,600.00
Department Dues (Less 50% for Dues Reserve)	19,700.00	19,600.00	19,750.00
Interest on Checking Account	1,000.00	878.50	1,000.00
Interest on Investments	3,000.00	3,125.00	3,500.00
Commissions from National Supply Department	375.00	385.00	400.00
Awards from National	500.00	450.00	500.00
Other Sources of Revenue (Miscellaneous)	1,525.00	1,690.00	2,025.00
	-----	-----	-----
TOTAL REVENUE	\$45,600.00	\$45,628.50	\$46,775.00
	=====	=====	=====

<u>EXPENSES:</u>	<u>BUDGET</u> <u>20XX-XY</u>	<u>ACTUAL</u> <u>20XX-XY</u>	<u>PROPOSED</u> <u>BUDGET</u> <u>20XY-XZ</u>
DEPARTMENT PRESIDENT			
Official Travel	\$4,000.00	\$3,890.00	\$4,000.00
Telephone	300.00	252.00	300.00
Printing, Stationery and Office Supplies	150.00	127.00	150.00
Postage	250.00	220.00	250.00
National Convention	800.00	756.75	800.00
National President's Homecoming	600.00	568.00	600.00
Conference Meeting	500.00	472.00	500.00
National Mid-Year Conference	500.00	435.67	600.00
Department Convention	400.00	3.00	400.00
Department President's Pin	50.00	50.00	50.00
Miscellaneous	250.00	187.50	250.00
	-----	-----	-----
	7,800.00	6,961.92	7,900.00
DEPARTMENT SECRETARY			
Salary and Payroll Taxes	5,000.00	5,000.00	5,250.00
Travel	600.00	522.00	600.00
Telephone	500.00	475.00	500.00
Printing, Stationery and Office Supplies	2,000.00	1,862.00	2,000.00
Postage	800.00	856.00	1,000.00
Equipment Rental and Maintenance	1,000.00	882.00	1,000.00
Rent	1,500.00	1,500.00	1,500.00
Miscellaneous	500.00	463.00	500.00
	-----	-----	-----
	11,900.00	11,560.00	12,350.00



	<u>BUDGET</u> <u>20XX-XY</u>	<u>ACTUAL</u> <u>20XX-XY</u>	<u>PROPOSED</u> <u>BUDGET</u> <u>20XY-XZ</u>
DEPARTMENT TREASURER			
Salary and Payroll Taxes	5,000.00	5,000.00	5,250.00
Travel	600.00	545.00	600.00
Telephone	500.00	468.00	500.00
Printing, Stationery and Office Supplies	800.00	770.00	800.00
Postage	1,000.00	1,125.00	1,200.00
Rent	1,500.00	1,500.00	1,500.00
Bond	75.00	75.00	100.00
Auditing	1,000.00	990.00	1,000.00
Miscellaneous	100.00	88.00	100.00
	-----	-----	-----
	10,575.00	10,561.00	11,050.00
CHIEF OF STAFF AND EXTENSION			
Travel	600.00	575.00	600.00
Telephone	100.00	88.00	100.00
Postage	100.00	67.00	100.00
Miscellaneous	50.00	22.00	50.00
	-----	-----	-----
	850.00	752.00	850.00
COUNCIL OF ADMINISTRATION			
Travel	4,000.00	3,875.00	4,000.00
Miscellaneous	100.00	52.00	100.00
	-----	-----	-----
	4,100.00	3,927.00	4,100.00
DISTRICT PRESIDENTS			
Travel for Inspection of Auxiliaries	3,000.00	2,894.00	3,000.00
PROMOTION OF PROGRAMS			
Chairmen's Supplies & Postage Expenses	2,000.00	1,985.00	2,500.00
Awards	3,000.00	3,000.00	3,000.00
	-----	-----	-----
	5,000.00	4,985.00	5,500.00
OTHER DEPARTMENT EXPENSES			
National President's Visit	650.00	640.00	750.00
Greetings to other Organizations	100.00	75.00	100.00
Flowers and Gifts	150.00	145.00	200.00
Conference Dues	100.00	100.00	100.00
Property Insurance	200.00	200.00	200.00
Officers' Travel Insurance	175.00	175.00	175.00
	-----	-----	-----
	1,375.00	1,335.00	1,525.00
CONTINGENT EXPENSES			
	1,000.00	285.00	500.00
	-----	-----	-----
TOTAL EXPENSES	===== \$45,600.00	===== \$43,260.92	===== \$46,775.00



HOSPITAL BUDGET

	BUDGET	ACTUAL	PROPOSED
	<u>20XX-XY</u>	<u>20XX-XY</u>	<u>20XY-XZ</u>
REVENUE:			
Donations from Auxiliaries	15,000.00	14,650.00	15,000.00
Interest revenue	500.00	485.00	500.00
Miscellaneous revenue	0.00	0.00	0.00
	-----	-----	-----
TOTAL REVENUE	15,500.00	15,135.00	15,500.00
	=====	=====	=====
EXPENSES:			
Monthly allowances (4 hospitals x \$200 per month)	9,600.00	9,600.00	9,600.00
Christmas allowances	1,600.00	1,550.00	1,600.00
Department President's gifts to hospitals	800.00	800.00	800.00
VAVS Representatives' travels	3,000.00	2,642.00	3,000.00
Promotion and postage	500.00	385.00	500.00
Miscellaneous expenses	0.00	0.00	0.00
	-----	-----	-----
TOTAL EXPENSES	15,500.00	14,977.00	15,500.00
	=====	=====	=====

DEPARTMENT CONVENTION BUDGET

	BUDGET	ACTUAL	PROPOSED
	<u>20XX-XY</u>	<u>20XX-XY</u>	<u>20XY-XZ</u>
REVENUE:			
Delegate fees	3,000.00	2,960.00	3,000.00
Miscellaneous revenues	0.00	0.00	0.00
	-----	-----	-----
TOTAL REVENUE	3,000.00	2,960.00	3,000.00
	=====	=====	=====
EXPENSES:			
Convention meeting rooms	500.00	500.00	500.00
Year-end Report Book Printing	1,000.00	925.00	1,000.00
Memorial Book Printing	250.00	190.00	250.00
Delegate ribbons, badges and credentials	350.00	346.00	350.00
Flowers and corsages	150.00	140.00	150.00
Flags to be presented	200.00	200.00	200.00
Minutes - printing and shipping	500.00	487.00	500.00
National Representative	50.00	50.00	50.00
Miscellaneous expenses	0.00	0.00	0.00
	-----	-----	-----
TOTAL EXPENSES	3,000.00	2,838.00	3,000.00
	=====	=====	=====



DEPARTMENT OF _____
BUDGET REPORT
 JULY 1, 20XX - SEPTEMBER 30, 20XX

<u>REVENUE:</u>	<u>BUDGET</u>	<u>ACTUAL</u>	<u>BALANCE</u>
Department Dues Transferred July 1 from Dues Reserve	\$19,600.00	\$19,600.00	\$0.00
Department Dues (Less 50% for Dues Reserve)	19,750.00	9,525.00	10,225.00
Interest on Checking Account	1,000.00	210.00	790.00
Interest on Investments	3,500.00	775.00	2,725.00
Commissions from National Supply Department	400.00	380.00	20.00
Awards from National	500.00	0.00	500.00
Other Sources of Revenue (Miscellaneous)	2,025.00	215.00	1,810.00
	-----	-----	-----
TOTAL REVENUE	\$46,775.00	\$30,705.00	\$16,070.00
	=====	=====	=====

<u>EXPENSES:</u>	<u>BUDGET</u>	<u>ACTUAL</u>	<u>BALANCE</u>
DEPARTMENT PRESIDENT			
Official Travel	\$4,000.00	\$1,200.00	\$2,800.00
Telephone	300.00	80.00	220.00
Printing, Stationery and Office Supplies	150.00	75.00	75.00
Postage	250.00	90.00	160.00
National Convention	800.00	748.00	52.00
National President's Homecoming	600.00	524.00	76.00
Conference Meeting	500.00	0.00	500.00
National Mid-Year Conference	600.00	0.00	600.00
Department Convention	400.00	0.00	400.00
Department President's Pin	50.00	0.00	50.00
Miscellaneous	250.00	35.00	215.00
	-----	-----	-----
	7,900.00	2,752.00	5,148.00
DEPARTMENT SECRETARY			
Salary and Payroll Taxes	5,250.00	1,312.50	3,937.50
Travel	600.00	220.00	380.00
Telephone	500.00	115.00	385.00
Printing, Stationery and Office Supplies	2,000.00	675.00	1,325.00
Postage	1,000.00	300.00	700.00
Equipment Rental and Maintenance	1,000.00	240.00	760.00
Rent	1,500.00	375.00	1,125.00
Miscellaneous	500.00	15.00	485.00
	-----	-----	-----
	12,350.00	3,252.50	9,097.50



	<u>BUDGET</u>	<u>ACTUAL</u>	<u>BALANCE</u>
DEPARTMENT TREASURER			
Salary and Payroll Taxes	5,250.00	1,312.50	3,937.50
Travel	600.00	185.00	415.00
Telephone	500.00	165.00	335.00
Printing, Stationery and Office Supplies	800.00	250.00	550.00
Postage	1,200.00	380.00	820.00
Rent	1,500.00	375.00	1,125.00
Bond	100.00	100.00	0.00
Auditing	1,000.00	0.00	1,000.00
Miscellaneous	100.00	0.00	100.00
	-----	-----	-----
	11,050.00	2,767.50	8,282.50
CHIEF OF STAFF AND EXTENSION			
Travel	600.00	125.00	475.00
Telephone	100.00	15.00	85.00
Postage	100.00	20.00	80.00
Miscellaneous	50.00	0.00	50.00
	-----	-----	-----
	850.00	160.00	690.00
COUNCIL OF ADMINISTRATION			
Travel	4,000.00	800.00	3,200.00
Miscellaneous	100.00	32.00	68.00
	-----	-----	-----
	4,100.00	832.00	3,268.00
DISTRICT PRESIDENTS			
Travel for Inspection of Auxiliaries	3,000.00	750.00	2,250.00
PROMOTION OF PROGRAMS			
Chairmen's Supplies & Postage Expenses	2,500.00	0.00	2,500.00
Awards	3,000.00	0.00	3,000.00
	-----	-----	-----
	5,500.00	0.00	5,500.00
OTHER DEPARTMENT EXPENSES			
National President's Visit	750.00	0.00	750.00
Greetings to other Organizations	100.00	0.00	100.00
Flowers and Gifts	200.00	36.00	164.00
Conference Dues	100.00	100.00	0.00
Property Insurance	200.00	195.00	5.00
Officers' Travel Insurance	175.00	175.00	0.00
Miscellaneous expenses	0.00	0.00	0.00
	-----	-----	-----
	1,525.00	506.00	1,019.00
CONTINGENT EXPENSES			
	500.00	0.00	500.00
	-----	-----	-----
TOTAL EXPENSES	\$46,775.00	\$11,020.00	\$35,755.00
	=====	=====	=====



RESTRICTED FUNDS:

HOSPITAL BUDGET

REVENUE:	<u>BUDGET</u>	<u>ACTUAL</u>	<u>BALANCE</u>
Donations from Auxiliaries	15,000.00	3,805.00	11,195.00
Interest income	500.00	115.00	385.00
Miscellaneous Revenues	0.00	0.00	0.00
	-----	-----	-----
TOTAL REVENUE	15,500.00	3,920.00	11,580.00
	=====	=====	=====

EXPENSES:	<u>BUDGET</u>	<u>ACTUAL</u>	<u>BALANCE</u>
Monthly allowances (4 hospitals x \$200 per month)	9,600.00	2,400.00	7,200.00
Christmas allowances	1,600.00	0.00	1,600.00
Department President's gifts to hospitals	800.00	200.00	600.00
VAVS Representatives' travels	3,000.00	680.00	2,320.00
Promotion and postage	500.00	186.00	314.00
Miscellaneous Revenues	0.00	0.00	0.00
	-----	-----	-----
TOTAL EXPENSES	15,500.00	3,466.00	12,034.00
	=====	=====	=====

DEPARTMENT CONVENTION BUDGET

REVENUE:	<u>BUDGET</u>	<u>ACTUAL</u>	<u>BALANCE</u>
Delegate fees	3,000.00	0.00	3,000.00
	-----	-----	-----
TOTAL REVENUE	3,000.00	0.00	3,000.00
	=====	=====	=====

EXPENSES:	<u>BUDGET</u>	<u>ACTUAL</u>	<u>BALANCE</u>
Convention meeting rooms	500.00	0.00	500.00
Year-end Report Book printing	1,000.00	0.00	1,000.00
Memorial Book printing	250.00	0.00	250.00
Delegate ribbons, badges and credentials	350.00	240.00	110.00
Flowers and corsages	150.00	0.00	150.00
Flags to be presented	200.00	180.00	20.00
Minutes - printing and shipping	500.00	0.00	500.00
National Representative	50.00	0.00	50.00
Miscellaneous Expenses	50.00	0.00	50.00
	-----	-----	-----
TOTAL EXPENSES	3,050.00	420.00	2,630.00
	=====	=====	=====



VFW AUXILIARY, DEPARTMENT OF _____

Voucher No. _____

Date _____

Payee: _____

(Vendor or Individual Name)

(Address)

(City, State and Zip Code)

ITEMIZE EXPENSES BELOW AND ATTACH INVOICES OR RECEIPTS

<u>ACCOUNT NO.</u>	<u>AMOUNT</u>	<u>PURPOSE</u>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
TOTAL	\$ _____	

+++++

PRESIDENT AND TREASURER USE ONLY:

Date Approved _____ Approved By _____

(Department President's Signature)

Date Paid _____ Check No. _____ Amount \$ _____



VFW AUXILIARY
DEPARTMENT OF _____
MONTH-END TRIAL BALANCE
JUNE 30, 20XY

<u>Account Number</u>	<u>Account Description</u>	<u>Debit Balance</u>	<u>Credit Balance</u>
1010	Cash - Checking Account	\$636.00	
1020	Cash - Savings Account	2,100.00	
1100	Investments	25,000.00	
1200	Accounts Receivable	0.00	
1300	Furniture, Fixtures and Equipment	5,600.00	
1310	Accumulated Depreciation - Furniture, Fixtures & Equip.		\$3,360.00
2100	Accounts Payable		1,852.00
2200	Deferred Revenue - 20XY Dues Reserve		19,600.00
3000	Net Assets		6,156.42
4100	20XX Department Dues Income from Dues Reserve		19,500.00
4110	20XY Department Dues Income		19,600.00
4200	Interest Income on Checking Account		878.50
4210	Interest Income on Investments		3,125.00
4300	Commissions from National Supply Department		385.00
4400	Awards from National		450.00
4600	Other Income		1,690.00
5110	Dept. Pres. - Official Travel	3,890.00	
5120	Dept. Pres. - Telephone	252.00	
5130	Dept. Pres. - Printing, Stationery & Office Supplies	127.00	
5140	Dept. Pres. - Postage	220.00	
5150	Dept. Pres. - National Convention	756.75	
5151	Dept. Pres. - National President's Homecoming	568.00	
5152	Dept. Pres. - Conference Meeting	472.00	
5153	Dept. Pres. - National Mid-Year Conference	435.67	
5154	Dept. Pres. - Department Convention	3.00	
5160	Dept. Pres. - Department President's Pin	50.00	
5190	Dept. Pres. - Miscellaneous	187.50	
5200	Dept. Sec. - Salary & Payroll Taxes	5,000.00	
5210	Dept. Sec. - Travel	522.00	
5220	Dept. Sec. - Telephone	475.00	
5230	Dept. Sec. - Printing, Stationery & Office Supplies	1,862.00	
5240	Dept. Sec. - Postage	856.00	
5250	Dept. Sec. - Equipment Rental & Maintenance	882.00	
5260	Dept. Sec. - Rent	1,500.00	
5290	Dept. Sec. - Miscellaneous	463.00	



VFW AUXILIARY
DEPARTMENT OF _____
MONTH-END TRIAL BALANCE
JUNE 30, 20XY

<u>Account Number</u>	<u>Account Description</u>	<u>Debit Balance</u>	<u>Credit Balance</u>
5300	Dept. Treas. - Salary & Payroll Taxes	5,000.00	
5310	Dept. Treas. - Travel	545.00	
5320	Dept. Treas. - Telephone	468.00	
5330	Dept. Treas. - Printing, Stationery & Office Supplies	770.00	
5340	Dept. Treas. - Postage	1,125.00	
5360	Dept. Treas. - Rent	1,500.00	
5370	Dept. Treas. - Bond	75.00	
5380	Dept. Treas. - Auditing	990.00	
5390	Dept. Treas. - Miscellaneous	88.00	
5410	Chief of Staff & Extension - Travel	575.00	
5420	Chief of Staff & Extension - Telephone	88.00	
5440	Chief of Staff & Extension - Postage	67.00	
5490	Chief of Staff & Extension - Miscellaneous	22.00	
5510	Council of Administration - Travel	3,875.00	
5590	Council of Administration - Miscellaneous	52.00	
5600	Dist. Pres. - Travel for Inspection of Auxiliaries	2,894.00	
5601	Promotion of Programs - Chairmen's Supplies & Postage	1,985.00	
5602	Promotion of Programs - Awards	3,000.00	
5603	National President's Visit	640.00	
5604	Greetings to other Organizations	75.00	
5605	Flowers & Gifts	145.00	
5606	Conference Dues	100.00	
5607	Property Insurance	200.00	
5608	Officers' Travel Insurance	175.00	
5609	Contingent Expenses	285.00	
	TOTALS	===== \$76,596.92	===== \$76,596.92 =====



AUDIT FOR THE PERIOD _____ THROUGH _____

ROLL FORWARD BY FUND PER BOOKS

**CASH AND INVESTMENTS ON HAND
(FOR ALL FUNDS)**

GENERAL FUND - CASH & INVESTMENTS

Balance Last Audit \$
 + Receipts
 - Disbursements
 Balance this Audit \$ - (A)

DUES RESERVE FUND:

Balance Last Audit \$
 + Receipts
 - Disbursements
 Balance this Audit \$ - (A)

PASS THROUGH FUND:

CANCER AID & RESEARCH

Balance Last Audit \$
 + Receipts
 - Disbursements
 Balance this Audit \$ - (A)

RESTRICTED FUNDS:

HOSPITAL FUND

Balance Last Audit \$
 + Receipts
 - Disbursements
 Balance this Audit \$ - (A)

DEPARTMENT CONVENTION FUND

Balance Last Audit \$
 + Receipts
 - Disbursements
 Balance this Audit \$ - (A)

TOTAL ALL FUNDS

\$ - (A's)

CHECKING ACCOUNT

Balance per Bank Statement \$
 + Deposits in Transit (attach list)
 - Outstanding Checks (attach list)
 + Interest
 - Bank Service Charges
 Other Reconciling Items
 Balance per Books \$ - (B)

SAVINGS ACCOUNT

Balance Last Audit \$
 + Deposits
 - Withdrawals
 + Interest
 Balance this Audit \$ - (B)

INVESTMENTS (attach list)

(e.g. Certificates of Deposit,
 U.S. Treasury Bills/Notes, etc.)
 Balance Last Audit \$
 + Purchases
 - Maturities
 Balance this Audit \$ - (B)

TOTAL CASH & INVESTMENTS \$ - (B's)

Note: Totals of the two columns must agree.

+++++

We certify that we have audited the Department's books including the books of the VAVS Representatives for the period referenced above and have found them to be correct.

Chairman Signature _____ Date _____

Approved by:

Committee Member Signature _____ Date _____

_____ / _____

Committee Member Signature _____ Date _____

initials / date



VFW Auxiliary

President & Treasurer Bonds

▣ Section 814 of National Bylaws:

- It is the duty of the Trustees to see that the offices of the President & Treasurer are bonded with an indemnity company authorized by National Headquarters or the Department
 - Who is the Department (President? Treasurer? C of A?)
- The bond must be in a sum at least double the amount of funds and value of property for which the President & Treasurer may be accountable
- The amount of the **bond shall be approved by the body** and the bond premium shall be paid from their funds
- The office of President shall hold the original bond of both offices



VFW Auxiliary

President & Treasurer Bonds

- ▣ Any VFW Auxiliary...failing to have the office of President & Treasurer bonded...shall be deprived of VFW Auxiliary representation on all levels
- ▣ After the Installation Report is input a bond may be purchased by the Treasurer on 7/1
- ▣ If an Installation Report is never input, a bond cannot be purchased by the Auxiliary officers
- ▣ The bond runs from September 1 through August 31 each year, and the premium is due in advance prior to September 1st



VFW Auxiliary

President & Treasurer Bonds

- ▣ Upon receipt of payment, a bond certificate will be available to the officers of the Auxiliary once the pending clearance time frame as passed
- ▣ The President shall retain the Bond
- ▣ The bond bonds the “offices” of the President & Treasurer. It does not bond the “individuals” holding the offices
 - If there is a change of President or Treasurer during the term of the bond, the new President or Treasurer is bonded without further action



VFW Auxiliary

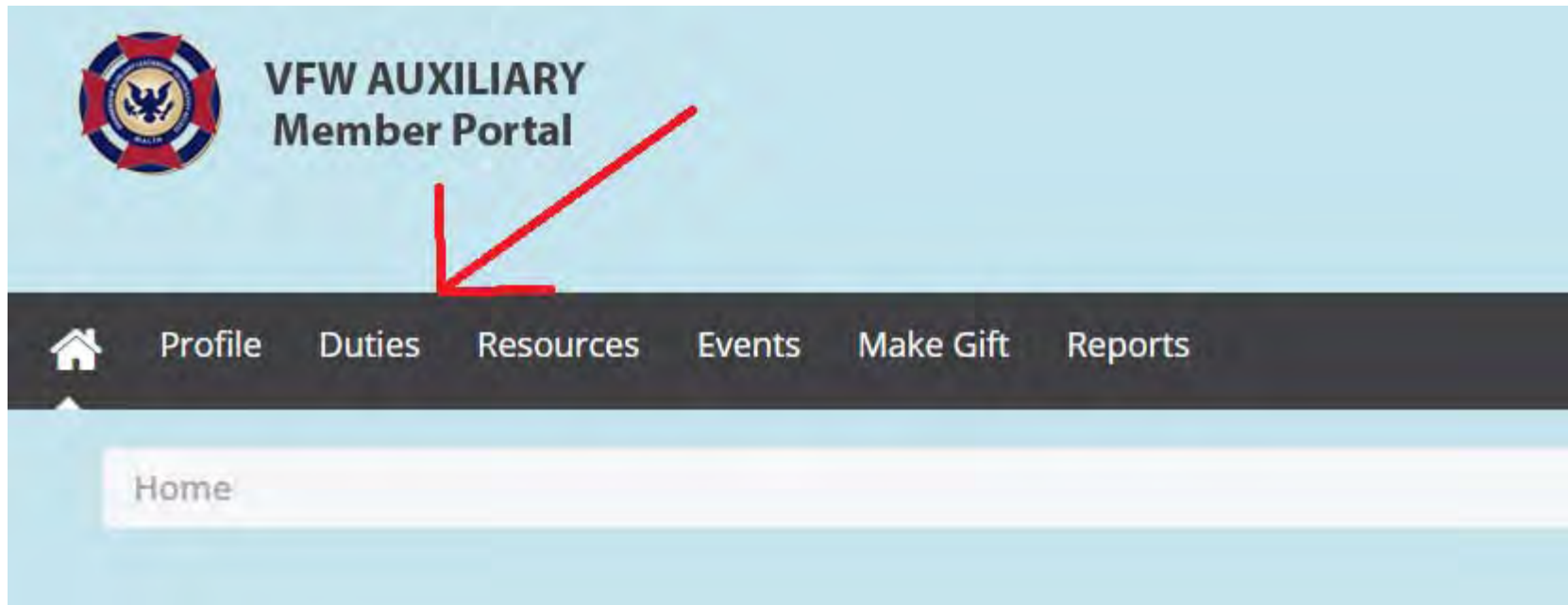
President & Treasurer Bonds

- ▣ In the event that a shortage is discovered:
 - A thorough audit should be made, and the exact amount of loss determined
 - The Trustees should contact the Tallman Insurance Agency at 816-753-2345
 - National HQ is not involved with the use of a bond
- ▣ Bingo and other gambling funds are not covered under this bond
 - Any Auxiliaries who have gambling operations should bond the individual accountable for the gambling funds through a separate policy on their own
 - To obtain a quote on group rates, they may contact Tallman Insurance Agency



VFW Auxiliary

President & Treasurer Bonds





VFW Auxiliary

President & Treasurer Bonds

Home Profile Duties Resources Events Make Gift Reports

Department Treasurer District Treasurer District Secretary Auxiliary Treasurer

Department of [REDACTED]

Shortcuts

-  [Process Dues](#)
-  [Reports](#)
-  [Receipts](#)
-  [Withdrawals by National](#)
-  [Deposits by National](#)
-  [Make a Gift](#)
-  [Purchase Bond](#)





VFW Auxiliary

President & Treasurer Bonds

Home | Profile | Duties | Resources | Events | Make Gift | Reports

Home | Officers | Auxiliary Treasurer | Purchase Bond

Purchase Bond - [REDACTED]

For Treasurer and President

Bond Amount * \$ 10,000

Whole Dollar Amounts Only

Premium Per Office * \$ 15.00

Total Due * \$ 30.00

You are purchasing a bond of \$10,000.00 for your Treasurer and President for September 01, 20[REDACTED] through August 31, 20[REDACTED] for \$30.00

Payment Method Select Payment Method

Purchase Bond **Cancel**



VFW Auxiliary

President & Treasurer Bonds

Home | Officers | Auxiliary Treasurer | Purchase Bond | Process Payment

Process Payment With Stored ACH - [REDACTED]

For Treasurer and President

Bond Amount \$ 10000.00

Premium Amount \$ 15.00

You are purchasing a bond of \$10,000.00 for your Treasurer and President for September 01, 20[REDACTED] through August 31, 20[REDACTED] for \$30.00

Routing Number [REDACTED]
[REDACTED] BANK ACH DEPT.

Account Number *****2400

I hereby agree to the Terms and Conditions of Purchase. [Click Here to Read Terms and Conditions](#)

I have been authorized by my Auxiliary to purchase a Bond for this amount by Vote or by standing rule.



BOND RECEIPT				
VFW Auxiliary				
OFFICE OF THE NATIONAL TREASURER				
DATE	EFFECTIVE PERIOD OF BOND		AUXILIARY NUMBER	AMOUNT OF PRESIDENT'S BOND
	FROM	TO		
	9/1/20	8/31/2		000
				000
[Redacted]				
Office of President & Treasurer				
This acknowledges receipt of your annual Bond premium and certifies that the President and Treasurer of the Auxiliary shown above are carried on the National Headquarters Bond for the period and principal sum indicated.				
This receipt is evidence that your Auxiliary is bonded with National Headquarters. Retain this receipt with Auxiliary records and hand over to your successor if a new Auxiliary President takes office prior to the expiration of this bond. Protection of Auxiliary funds is one of the main duties of the Auxiliary President.				
[Redacted Signature]				
NATIONAL TREASURER				

NATIONAL HEADQUARTERS SCHEDULE BOND

1. The schedule bond carried by National Headquarters is designed specifically to meet the needs of our organization. It bonds the office of the President and Treasurer and not the individuals holding the offices. If your Auxiliary has a change in Treasurers during the term of the bond, the new Treasurer is bonded without further action on the part of the Auxiliary, except that she be properly elected and installed in office.
2. The minimum bond amount is \$10,000.00 for a premium of \$15.00 per office. Additional coverage may be obtained at a cost of \$3.50 for each additional \$1,000.00 of coverage per office. The amount can be increased up to January 31st upon payment of the difference in premium.
3. This is a straight dishonesty bond and proof of loss resulting from dishonest acts on the part of the Treasurer is required in settlement of a claim. Losses resulting from burglary by an outsider, fire, flooding, etc. would not be covered under the bond, but would most likely be covered under the individual's homeowner's or renter's insurance.
4. The bond is written in consideration of the safeguards which our Bylaws require in the handling of funds. 806A, 810, 813, 814A, of the Bylaws shall be strictly complied with. Compliance with the Bylaws will significantly reduce the risk of any loss. The Bylaws mandate that the Trustees perform quarterly audits of the books and records of the Auxiliary Treasurer. The detailed audit reports must be incorporated in the Auxiliary's minutes and a copy must be submitted to the Department Treasurer. The Trustees must verify all expenditures of the Auxiliary and certify by their signature to the correctness of each bill before payment may be made of same by the Treasurer. The Auxiliary President must countersign all checks drawn by the Treasurer for disbursement of money by motion made and passed at a meeting. Checks should never be pre-signed by either Officer. We also recommend that the Treasurer deposit all money in the exact form in which it was received (i.e., checks should be deposited as checks, and cash should be deposited as cash). Auxiliary accounts should be open to inspection at all times.
5. The insurance policy specifically states that the indemnity company shall not be liable for loss under this policy unless, within twelve (12) months prior to discovery of such loss, the Insured shall have made or cause to have been made a careful inspection and audit of the books, records and accounts, including a complete verification of all securities and bank balances of the defaulting Treasurer.
6. The insurance policy further states that this insurance is cancelled immediately upon discovery by the Auxiliary or any of the members, Trustees, or other officers not in collusion with the defaulting President or Treasurer of any dishonest act committed by that officer whether before or after being elected by the Auxiliary to that office.
7. The master insurance policy is on file at National Headquarters. A Bond Receipt should serve as sufficient evidence of coverage. The Auxiliary President shall retain the Bond Receipt and deliver it to the successor in office.
8. Bingo and other gambling funds are not covered under this bond. If your Auxiliary has gambling operations, you must bond the individual accountable for the gambling funds through a separate policy on your own. To obtain a quote on group rates for Auxiliaries, you may write to Tallman Insurance Agency at 406 West 34th Street, Suite 806, Kansas City, MO 64111, or call them at 1-816-753-2345.



VFW Auxiliary

Other Issues

- Federal ID Numbers
- 8822-B's
- Exemption of Federal Income Tax
- Group Exemptions
- 990's and 990-N ePostcards
- Direct Deposit
- Cancer Insurance
- Retention of Records
- Consolidation of Auxiliaries



VFW Auxiliary

Applying for an Employer Identification Number (EIN)

- ▣ Also know as Federal Identification Number (FIN)
- ▣ EIN required to file the annual 990-N ePostcard
- ▣ No fee to register for EIN
- ▣ IRS form SS-4



Form SS-4 (Rev. January 2010) Department of the Treasury Internal Revenue Service	Application for Employer Identification Number (For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.) ▶ See separate instructions for each line. ▶ Keep a copy for your records.	OMB No. 1545-0003 EIN
Type or print clearly.	1 Legal name of entity (or individual) for whom the EIN is being requested VFW OF THE US AUXILIARY TO XXXXX POST 12345	3 Executor, administrator, trustee, "care of" name SALLY A. JONES, TREASURER
	2 Trade name of business (if different from name on line 1)	5a Street address (if different) (Do not enter a P.O. box.)
	4a Mailing address (room, apt., suite no. and street, or P.O. box) 1234 ANY STREET	5b City, state, and ZIP code (if foreign, see instructions)
	4b City, state, and ZIP code (if foreign, see instructions) KANSAS CITY, MO 64111	6 County and state where principal business is located JACKSON, MO
	7a Name of responsible party NORMA B. JONES, PRESIDENT	7b SSN, ITIN, or EIN 123-45-6789
	8a Is this application for a limited liability company (LLC) (or a foreign equivalent)? <input type="checkbox"/> Yes <input type="checkbox"/> No	8b If 8a is "Yes," enter the number of LLC members ▶
	8c If 8a is "Yes," was the LLC organized in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	9a Type of entity (check only one box). Caution. If 8a is "Yes," see the instructions for the correct box to check.	
	<input type="checkbox"/> Sole proprietor (SSN) _____ <input type="checkbox"/> Partnership _____ <input type="checkbox"/> Corporation (enter form number to be filed) ▶ _____ <input type="checkbox"/> Personal service corporation _____ <input type="checkbox"/> Church or church-controlled organization _____ <input checked="" type="checkbox"/> Other nonprofit organization (specify) ▶ 501(C)19 VETERANS OR <input type="checkbox"/> Other (specify) ▶ _____	
	9b If a corporation, name the state or foreign country (if applicable) where incorporated	State _____ Foreign country _____
10 Reason for applying (check only one box)		
<input type="checkbox"/> Started new business (specify type) ▶ _____ <input type="checkbox"/> Banking purpose (specify purpose) ▶ _____ <input type="checkbox"/> Changed type of organization (specify new type) ▶ _____ <input type="checkbox"/> Purchased going business _____ <input type="checkbox"/> Hired employees (Check the box and see line 13.) <input type="checkbox"/> Created a trust (specify type) ▶ _____ <input type="checkbox"/> Compliance with IRS withholding regulations _____ <input type="checkbox"/> Created a pension plan (specify type) ▶ _____ <input type="checkbox"/> Other (specify) ▶ COMPLIANCE WITH IRS REQUIREMENTS TO FILE 990-N		
11 Date business started or acquired (month, day, year). See instructions. JANUARY 16, 2014	12 Closing month of accounting year JUNE	
13 Highest number of employees expected in the next 12 months (enter -0- if none). If no employees expected, skip line 14.	14 If you expect your employment tax liability to be \$1,000 or less in a full calendar year and want to file Form 944 annually instead of Forms 941 quarterly, check here. (Your employment tax liability generally will be \$1,000 or less if you expect to pay \$4,000 or less in total wages.) If you do not check this box, you must file Form 941 for every quarter. <input checked="" type="checkbox"/>	
15 First date wages or annuities were paid (month, day, year). Note. If applicant is a withholding agent, enter date income will first be paid to nonresident alien (month, day, year) ▶ NOT FOR PROFIT WAR VETERANS AU		
16 Check one box that best describes the principal activity of your business.		
<input type="checkbox"/> Construction <input type="checkbox"/> Rental & leasing <input type="checkbox"/> Transportation & warehousing <input type="checkbox"/> Health care & social assistance <input type="checkbox"/> Wholesale-agent/broker <input type="checkbox"/> Real estate <input type="checkbox"/> Manufacturing <input type="checkbox"/> Finance & insurance <input type="checkbox"/> Accommodation & food service <input type="checkbox"/> Wholesale-other <input type="checkbox"/> Retail <input type="checkbox"/> Other (specify) _____		
17 Indicate principal line of merchandise sold, specific construction work done, products produced, or services provided. ASSIT VFW POSTS & MEMBERS, ADVANCE FRATERNAL, PATRIOTIC, HISTORICAL, & EDUCATION OBJECTS...		
18 Has the applicant entity shown on line 1 ever applied for and received an EIN? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," write previous EIN here ▶		
Third Party Designee	Designee's name	Designee's telephone number (include area code) ()
	Address and ZIP code	Designee's fax number (include area code) ()
Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.		Applicant's telephone number (include area code) (816) 555-1234
Name and title (type or print clearly) ▶ SALLY A. JONES, TREASURER		Applicant's tax number (include area code) ()
Signature ▶	Date ▶	



VFW Auxiliary

New Accountable Officer /Auxiliary Treasurer



- ❑ Need to notify IRS of change in responsible party
- ❑ File form 8822-B **with the IRS** within 60 days of election
- ❑ Ensures IRS correspondence goes to the address of the new Treasurer
- ❑ Only new Treasurers file this



Form **8822-B**

Change of Address or Responsible Party — Business

(Rev. December 2019)
Department of the Treasury
Internal Revenue Service

▶ Please type or print.

▶ See instructions on back. ▶ Do not attach this form to your return.
▶ Go to www.irs.gov/Form8822B for the latest information.

OMB No. 1545-1163

Before you begin: If you are also changing your home address, use Form 8822 to report that change.

If you are a tax-exempt organization (see instructions), check here

Check **all** boxes this change affects.

- 1 Employment, excise, income, and other business returns (Forms 720, 940, 941, 990, 1041, 1065, 1120, etc.)
- 2 Employee plan returns (Forms 5500, 5500-EZ, etc.)
- 3 Business location

4a Business name VFW OF THE US AUXILIARY TO XXXXXX POST 12345		4b Employer identification number 00-0000000	
5 Old mailing address (no., street, room or suite no., city or town, state, and ZIP code). If a P.O. box, see instructions. If foreign address, also complete spaces below, see instructions. 1234 ANY STREET, KANSAS CITY, MO 64111			
Foreign country name		Foreign province/county	Foreign postal code
6 New mailing address (no., street, room or suite no., city or town, state, and ZIP code). If a P.O. box, see instructions. If foreign address, also complete spaces below, see instructions. 6789 MY STREET, ST. LOUIS MO 63123			
Foreign country name		Foreign province/county	Foreign postal code
7 New business location (no., street, room or suite no., city or town, state, and ZIP code). If a foreign address, also complete spaces below, see instructions.			
Foreign country name		Foreign province/county	Foreign postal code
8 New responsible party's name SUZIE Q. SMITH			
9 New responsible party's SSN, ITIN, or EIN. (CAUTION: YOU MUST REFER TO THE INSTRUCTIONS FOR FORM SS-4 TO SEE WHO MAY USE AN EIN.) 123-45-6789			
10 Signature. Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete. Daytime telephone number of person to contact (optional) ▶ 816-555-1234			

Sign Here

Signature of owner, officer, or representative
TREASURER
Title

Date

Where To File

Send this form to the address shown here that applies to you.

IF your old business address was in . . .	THEN use this address . . .
Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin	Internal Revenue Service Kansas City, MO 64999
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, any place outside the United States	Internal Revenue Service Ogden, UT 84201-0023



VFW Auxiliary

Tax Exempt Status of an Auxiliary

- ▣ IRS Publication 557
- ▣ National does **NOT** have a Group Exemption
- ▣ Group Exemptions are at the Department level
- ▣ What is a Group Exemption?
- ▣ Does your Department have a Group Exemption?
- ▣ If so, what to do to maintain Exempt status
- ▣ If not...now what?



VFW Auxiliary

Loss of Exempt Status or No Group Exemption

- ❑ File IRS form 1024 (19 page document) along with IRS form 8717 and appropriate filing fee (\$600 - \$3,000)
- ❑ Have not filed 990-N ePostcard for 3 consecutive years
- ❑ May retroactively reinstate exemption by writing “Revenue Procedure 2014-11, Streamlined Retroactive Reinstatement” at top of IRS Form 1024
- ❑ Auxiliary can’t afford filing fee – does the Auxiliary have to be Exempt?



VFW Auxiliary

Loss of Exempt Status

Effect of Losing Tax-Exempt Status

If an organization's tax-exempt status is automatically revoked, it is no longer exempt from federal income tax. Consequently, it may be required to file one of the following federal income tax returns and pay applicable income taxes:

- **Form 1120**, *U.S. Corporation Income Tax Return*, due by the 15th day of the 3rd month after the end of the organization's **tax year**
- **Form 1041**, *U.S. Income Tax Return for Estates and Trusts*, due by the 15th day of the 4th month after the end of your organization's **tax year**

<https://www.irs.gov/charities-non-profits/automatic-revocation-of-exemption>



VFW Auxiliary

Maintaining Group Exemption

In order to maintain a group exemption letter, the central organization must: (IRS Rev. Proc. 80-27, 1980-1 C.B. 677)

- ▣ Submit annually, **at least 90 days before the close of its annual accounting period (By March 31st)**, to the Internal Revenue Service Center the following information:
 - ▣ Information regarding all changes in the purposes, character, or method of operation of subordinates included in the group exemption letter.
 - ▣ Lists of subordinates that have changed their names or addresses during the year
 - ▣ Subordinates no longer to be included in the group exemption letter because they have ceased to exist
 - ▣ Subordinates to be added to the group exemption letter because they are newly organized or affiliated
- ▣ A separate list must be submitted for each of the categories set out above.
- ▣ Each list must show the names, mailing address (including Postal ZIP Codes), actual address if different, and employer identification numbers of the affected subordinates. An annotated directory of subordinates will not be accepted for this purpose.
- ▣ If there were none of the above changes, the central organization must submit a statement to that effect.



VFW Auxiliary

Maintaining Group Exemption

Sending the information to the Internal Revenue Service:

- ▣ If Department is located in Indiana, Kentucky, Michigan, Ohio, or West Virginia, send the report to the Internal Revenue Service Center, Cincinnati, Ohio 45999.
- ▣ If Department is located in Maine, New Hampshire, Vermont, Connecticut, Massachusetts, or Rhode Island, send the report to the Internal Revenue Service Center, Andover, Massachusetts 05501.
- ▣ If Department is located in California, Hawaii, Arizona, Utah, or Nevada, send the report to the Internal Revenue Service Center, Fresno, California 93888.
- ▣ If Department is located in North Carolina, South Carolina, Georgia, Florida, Tennessee, Alabama, or Mississippi, send the report to the Internal Revenue Service Center, Atlanta, Georgia 31101.
- ▣ If Department is located in Arkansas, Colorado, Kansas, Louisiana, New Mexico, Oklahoma, Texas, or Wyoming, send the report to the Internal Revenue Service Center, Austin, Texas 73301.
- ▣ If Department is located in Alaska, Idaho, Minnesota, Montana, North Dakota, Oregon, South Dakota, Washington, or Wisconsin, send the report to the Internal Revenue Service Center, Ogden, Utah 84201.
- ▣ If Department is located in New Jersey or New York, send the report to the Internal Revenue Service Center, Holtsville, New York 00501.
- ▣ If Department is located in Illinois, Iowa, Missouri, or Nebraska, send the report to the Internal Revenue Service Center, Kansas City, Missouri 64999.
- ▣ If Department is located in Delaware, Maryland, Pennsylvania, Virginia, send the report to the Internal Revenue Service Center, Philadelphia, Pennsylvania 19255.



VFW Auxiliary

Tax Deductibility of Donations to an Auxiliary

- ▣ 501 (c) 19 organizations
 - ▣ Internal Revenue Manual, Part 7, Chapter 25, Section 19 of IRS Rulings and Agreements:
 - Internal Revenue Code 170(c)3 provides income tax deduction for contributions to a post of “war veterans” if at least 90% of members are war veterans
 - The majority of members of the VFW Auxiliary are **NOT** war veterans
- ▣ If a VFW Auxiliary has a donation of \$500 or more, it can go through the VFW Foundation – contact Richard Potter (816) 756 - 3390



Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
VFW OF THE US AUXILIARY TO XXXXXXXX POST 12345

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC C Corporation S Corporation Partnership Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ **NOT FOR PROFIT 501(c)19**

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
 Exempt payee code (if any) **1**
 Exemption from FATCA reporting code (if any) _____
 (Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
1234 ANY STREET

6 City, state, and ZIP code
KANSAS CITY, MO 64111

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

				-			-				
--	--	--	--	---	--	--	---	--	--	--	--

or

Employer identification number

0	0	-	0	0	0	0	0	0	0	0	0
---	---	---	---	---	---	---	---	---	---	---	---

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶ _____ Date ▶ _____

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



VFW Auxiliary

990-N ePostcard



- ▣ To file a 990-N ePostcard
 - Register with the IRS website
 - Respond to the activation email sent during the registration process
 - Complete and submit the 990-N ePostcard for an exempt organization

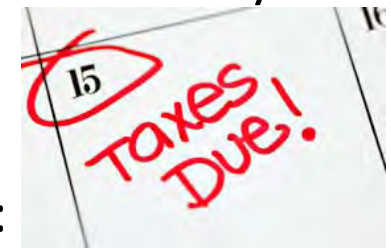
- ▣ 990-N ePostcard must be filed electronically on the website <https://sa.www4.irs.gov/epostcard/>



VFW Auxiliary

990-N ePostcard

- Due within 4 ½ months after the end of the organization's fiscal year
 - Section 920 of Bylaws the Fiscal Year End is June 30th
 - 990-N ePostcard is due by **November 15th** each year
- Information needed to complete the 990-N ePostcard:
 - Your organization's Employer Identification Number (EIN)
 - Your organization's legal name
 - Any other names your organization uses to do business (DBA name)
 - Able to answer the following questions:
 - Are the gross receipts normally \$50,000 or less?
 - The organization's mailing address, city, state and zip code
 - The organization's website address (if it has one)
 - The name and address of one of your organization's principal officer
 - 990-N ePostcard user guide at <https://www.irs.gov/pub/irs-pdf/p5248.pdf>





VFW Auxiliary



First Time Users

If this is the first time you are using this online service, we will need to verify your identity before we proceed.

GET STARTED >



Returning Users

Log in below if you've previously registered through any of the following applications:

- Get Transcript
- Identity Protection PIN (IP PIN)
- Online Payment Agreement (OPA)

Username

Mask Username

LOGIN >

[Forgot Username](#)

WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.

[IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)



VFW Auxiliary

REGISTRATION: FIRST TIME USERS ONLY

STEP 1

Enter your contact information, then select **SEND EMAIL CONFIRMATION CODE**

The screenshot shows the IRS registration interface. At the top left is the IRS logo. The main heading is "Step 1 of 4: Personal Information". Below this, it states "All fields are required." There are four input fields: "First Name", "Last Name", "Email Address", and "Re-Enter Email Address". At the bottom, there are two buttons: "CANCEL" and "SEND EMAIL CONFIRMATION CODE" with a right-pointing arrow. A note at the bottom of the form area says "A confirmation code will be sent to your email address."



VFW Auxiliary



IRS.online.services@irs.gov

Your IRS Online Services Email Confirmation Code

To [REDACTED]

i This is the most recent version, but you made changes to another copy. [Click here to see the other versions.](#)

Your confirmation code is: [REDACTED]

This code will expire in 15 minutes. Enter it into the Email Confirmation Code field as soon as possible to access your requested service.

This is an automated email. Please do not reply.

IRS will never initiate contact through email asking taxpayers for personal or financial information.



Step 2 of 4: Verify Identity

- !** Do not close this browser window or you will have to restart the process.
- A confirmation code will be sent to your email address within the next 10 minutes
 - Check your spam folder if you don't receive an email.
 - If you don't receive a confirmation code within 15 minutes, please select cancel and request a new code.

Enter Confirmation Code

CANCEL

CONTINUE >



VFW Auxiliary

Step 3 of 4: Security Profile

All fields are required

User ID and Password

User ID

Password

Re-enter Password

Primary Email

Enter a User ID of your choice. The User ID cannot be an email address, SSN, or contain a space, or special character (!@#\$\$%^&*).

Password Rules:

- Between 8 and 20 characters long
- Must contain at least one numeric and one special character (!@#\$\$%^&*)
- At least one uppercase and at least one lowercase letter.
- Matching password must be re-entered.

STEP 3B

Choose a **SITE PHRASE**. This phrase will appear on your login page before you input your password. When you see the phrase you created while logging in, you can be assured you're not on a scam or fake page. You may use spaces within the site phrase.

Choose a Site Phrase

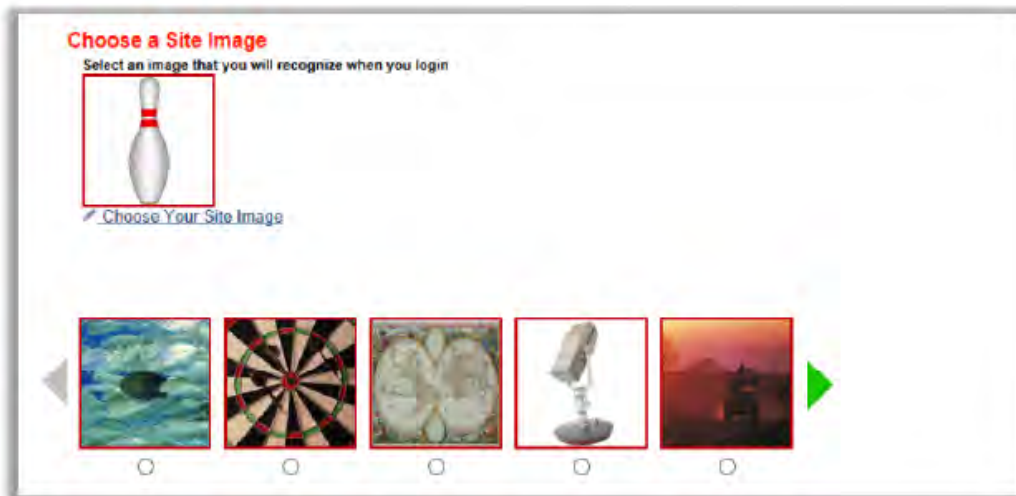
Create a phrase that you will recognize when you login



VFW Auxiliary

STEP 3C

Choose a **SITE IMAGE**. This image will appear on your login page before you input your password. When you see your selected image while logging in, you can be assured you're not on a scam or fake page.





VFW Auxiliary

Question 1

Answer 1

Question 2

Answer 2

Question 3

Answer 3

Question 4

Answer 4



VFW Auxiliary



User Profile Successfully Created

Your profile was successfully created. Please write down your Username for future reference.

[CONTINUE](#) >

[IRS Privacy Policy](#) | [Security Code Terms and Conditions](#) | [Accessibility](#)



VFW Auxiliary



Electronically file your Form 990-N (e-Postcard)

[Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile

Before you can create a Form 990-N (e-Postcard), you must create your e-Postcard Profile. Your e-Postcard Profile allows you to:

1. Designate your e-Postcard Profile as either a "Preparer" or "Exempt Organization"
2. Add EINs to your e-Postcard Profile
3. Remove EINs from your e-Postcard Profile

[More information](#) on who must file a Form 990-N.

Once created, you can update your e-Postcard profile at any time. Click the button below to get started.

[MANAGE E-POSTCARD PROFILE](#)

Manage Form 990-N Submissions

Once your e-Postcard Profile is created, you can use the Manage Form 990-N Submissions page to:

1. Create a Form 990-N
2. View the status of your existing Form 990-N submission(s)
3. Edit an in-progress Form 990-N
4. Delete an in-progress Form 990-N

[MANAGE FORM 990-N SUBMISSIONS](#)

Application Version Number: 1.0.3

Version Build Date: 2016-03-08 18:18

[Support](#) | [Privacy Policy](#) | [Links](#) | [Requirements and Tips](#) | [FAQ](#)



VFW Auxiliary

From the drop down shown below, select either **Exempt Organization** or **Preparer** in the “User Type” field.

- **Exempt Organization:** Select if you are only completing 990-N for your organization.
- **Preparer:** Select if you expect to help multiple organizations.
 - Example: a preparer can be a paid preparer, such as a CPA, volunteer or someone aiding exempt organizations at a local library. By selecting **Preparer**, you can use your login to add as many organizations as you wish.

e-Postcard Profile [Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile Select EIM Organization Details Contact Information Confirmation

Please select Exempt Organization or Preparer

User Type

Select One
Exempt Organization
Preparer

PREVIOUS CONTINUE

After selecting the user type, select **CONTINUE**.



VFW Auxiliary

Enter an EIN for the organization you're filing for, then click **ADD EIN**. You may also delete EINs already associated with your profile. To continue, select **CREATE NEW FILING**.

e-Postcard Profile [Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile [Select EIN](#) [Organization Details](#) [Contact Information](#) [Confirmation](#)

You are logged in as: **Exempt Organization** [Edit user type](#)

EIN

- **ADD EIN**

Currently Associated EIN(s)

EIN	Organization Name	Date Added	Delete
No EINs are currently associated with your ID			

DELETE EIN **CREATE NEW FILING**



VFW Auxiliary

Select the EIN you wish to file for from the drop down menu. Once you have selected the EIN, select **CONTINUE**.

Select EIN [Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile **Select EIN** Organization Details Contact Information Confirmation

Please select the EIN for which you want to file for

EIN
-Select EIN-

< MANAGE E-POSTCARD PROFILE CONTINUE >



VFW Auxiliary



Organization Details

[Home](#) | [Security Profile](#) | [Logout](#)

e-Postcard Profile Select EIN **Organization Details** Contact Information Confirmation

Electronic Notice-Form 990-N (e-Postcard)

Organization Information

For the tax year ending

Has your organization terminated or gone out of business?

Are your gross receipts normally \$50,000 or less?

Organization's legal name -Line 1

Organization's legal name -Line 2

Employer Identification Number (EIN)



VFW Auxiliary



Contact Information

[Home](#) | [Security Profile](#) | [Logout](#)

[e-Postcard Profile](#) | [Select EIN](#) | [Organization Details](#) | [Contact Information](#) | [Confirmation](#)

Electronic Notice-Form 990-N (e-Postcard)

Organization Address and Principal Officer Information

Organization's legal name

If your organization conducts business using another name (DBA), enter other names:

* = required field

Organization:

DBA Name

DBA Name - continued

Country*

Number and Street (or PO Box)*

City or Town*

State*

Zip Code*

Organization's website address, if applicable

Principal Officer:

Type of Name*

Person Name*

Country*

Number and Street (or PO Box)*

City or Town*

State*

Zip Code*



VFW Auxiliary

The filing “Confirmation” will display the filing status as “Pending.”

Click on the word **PRINT** in the bottom paragraph to print a copy for your records. Once you leave the page, you won’t be able to print this filing.

Select **MANAGE FORM 990-N SUBMISSIONS** to view or submit additional filings.

Confirmation [Home](#) [Security Profile](#) [Logout](#)

[e-Postcard Profile](#) [Select EIN](#) [Organization Details](#) [Contact Information](#) [Confirmation](#)

Your Form 990-N(e-Postcard) has been submitted to the IRS

- Organization Name: XXXXXXXXXXXX
- EIN: XX-XXXXXXX
- Tax Year: XXXXXXXXXXXX
- Tax Year Start Date: XXXXXXXXXXXX
- Tax Year End Date: XXXXXXXXXXXX
- Submission ID: XXXXXXXXXXXX
- Filing Status Date: XXXXXXXXXXXX
- Filing Status: Pending

Note: Print a copy of this filing for your records. Once you leave this page, you will not be able to do so.

[MANAGE FORM 990-N SUBMISSIONS](#)

MANAGING FORM 990-N SUBMISSIONS

STEP 13

On the “Manage Form 990-N Submission” page, your submission will show the status of “Pending.”

- After seven minutes, refresh the page (F5 key for Windows; Command-R for Mac) and the **GET UPDATED STATUS** button will be visible.
- Select **GET UPDATED STATUS** to see if your submission was accepted or rejected.
- If your submission was rejected, select the **submission ID** hyperlink for additional details.



VFW Auxiliary

990-N ePostcard Issues

Tax year is incorrect

- Send letter to IRS requesting to change tax year

Internal Revenue Service

Attn: EO Entity

MS 6273

Ogden, UT 84201



VFW Auxiliary



VETERANS OF FOREIGN WARS AUXILIARY NATIONAL HEADQUARTERS

July 19, 2016

Internal Revenue Service

Attn: EO Entity
MS 6273
Ogden, UT 84201

To Whom It May Concern:

I would like to update the information for my organization's tax year. My organization's name is VFW OF THE AUXILIARY TO xxxxx Post 12345. The Employer Identification Number for this organization is 00-0000000. The address for this organization is 1234 Your Avenue in Kansas City, MO 64111. The tax year end currently on file with the Internal Revenue Service is December 31st. The correct tax year end for this organization is June 30th. I appreciate your assistance with this matter. If you have any questions, you may reach my phone at 816-800-8749 or by mail at our organizations address listed above. We appreciate your assistance with this matter.

Regards,

Kimberly Jackson

Principal Officer, VFW OF THE AUXILIARY TO xxxxx Post 12345



VFW Auxiliary

990-N ePostcard Issues

- ▣ Has the 990-N ePostcard been filed in past?
 - Look on IRS website for **Exempt Organization Select Check** at <http://apps.irs.gov/app/eos>
 - *Please note that the VFW Auxiliary National Headquarters has found that this website might not be up to date.*



VFW Auxiliary

Direct Deposits



- ▣ All funds to related organizations will be sent only via Electronic Funds Transfer (EFT) (aka ACH / Direct Deposit) from National Headquarters
 - You will be notified via e-mail that a deposit has been made into your bank account
 - National is **NOT** going to take funds out of your account **without** your knowledge
 - You may find the form ACH Authorization Form on the VFW Auxiliary website behind login
 - Must submit new form if changing banks, accounts, or bank information changes (i.e. bank changes names) or enter new information in MALTA



VFW Auxiliary

ACH AUTHORIZATION FORM



ENTITY NAME _____
(of Auxiliary, District, County Council or Department as listed on bank account)

Federal Identification Number (EIN or FIN) _____
(as listed on bank records -- 9 digit number)

I (we) hereby authorize the Veterans of Foreign Wars of the United States Auxiliary National Headquarters, hereinafter called "**National**", to initiate entries to deposit or withdraw funds from our **Checking** account indicated below.

FINANCIAL INSTITUTION (BANK) NAME _____

BRANCH _____

CITY _____ STATE _____ ZIP _____

TRANSIT/ABA NO. _____
(9 digit number on bottom of check or deposit slip)

ACCOUNT NO. _____

This authority is to remain in full force and effect until **National** has received written notification from me (or either of us) of its termination in such time and in such manner as to afford **National** a reasonable opportunity to act on it.

NAME (please print) _____
(President) (Treasurer)

DAYTIME PHONE NUMBER _____
(President) (Treasurer)

E-MAIL ADDRESS TO SEND TRANSACTION NOTICE: (please print)

SIGNATURE (REQUIRED) _____
(President) (Treasurer)

DATE _____ DATE _____



ATTACH VOIDED CHECK HERE

RETURN COMPLETED FORM TO:
VFW AUXILIARY NATIONAL HEADQUARTERS
ATTN: ACCOUNTING
406 W. 34TH ST., 10TH FLOOR
KANSAS CITY, MO 64111



VFW Auxiliary

Retention of Auxiliary Records

- ▣ Most accounting records = 6 years
 - Accounts Receivables
 - Accounts Payables
 - Canceled Checks
 - Bank Statements
- ▣ Great resource
 - Booklet of Instructions in Bylaws (yellow pages)
 - ▣ Pages 14 – 15
- ▣ Paper vs. electronic file keeping





VFW Auxiliary

Consolidation of Auxiliaries

- ▣ Auxiliary whose post number stayed the same
 - Federal identification number (FIN / EIN) that will continue to be used
 - Must inform bank of any name change
 - Must inform the IRS of a name change
 - ▣ Write letter to IRS on letterhead and send to:
Internal Revenue Service
Exempt Organizations Determinations
Room 4024
P.O. Box 2508
Cincinnati, OH 45201





VFW Auxiliary



VETERANS OF FOREIGN WARS AUXILIARY NATIONAL HEADQUARTERS

July 19, 2016

Internal Revenue Service

Exempt Organizations Determinations
Room 4024
P.O. Box 2508
Cincinnati, OH 45201

To Whom It May Concern:

I would like to update the information for my organization's Employer Identification Number. My name is Sally A. Jones, Treasurer and principal officer of the formerly named LADIES AUXILIARY, xxxxx Post 12345. The Employer Identification Number for this organization is 00-0000000. The new name of the organization associated with EIN 00-0000000 is VFW OF THE US AUXILIARY, xxxxx Post 12345.

Regards,

Patti Smith

Principal Officer, VFW OF THE US AUXILIARY, xxxxx Post 12345

I would include the Special Order of Consolidation received by the Auxiliary



VFW Auxiliary

Consolidation of Auxiliaries

- ▣ The Auxiliary that no longer exists must inform the IRS
 - File final 990-N ePostcard!



VFW Auxiliary

Membership Items

- ▣ Preferred method of communication is e-mail
- ▣ Follow chain of command (Member – Auxiliary – Department – Headquarters)
- ▣ Membership for month end is due by 11:59 PM Central time on-line or in National office on the last working day of month by end of business (3:30 PM Central time)



VFW Auxiliary

Membership Items

- A member who has paid dues to December 31st is in **good standing**
- Member ceases to be in good standing on January 1st immediately following the year for which her/his dues have been paid (cannot access website and will be removed if an officer) **(lapsed)**
- Member shall not again be in good standing until their dues have been paid for the current year
- Dues must be processed by June 30 to remain a **continuous member**
- Prior years dues may not be paid after July 1st **(terminated)**
- A member who has not maintained their annual membership in the VFW Auxiliary may rejoin membership in any VFW Auxiliary by payment of the current year's dues
- Rejoined members shall submit an application and be accepted in the same manner as a new member in an Auxiliary
 - No admission fee shall be required
- Date of rejoin starts new continuous membership timeline
- Membership start date is date processed in MALTA



VFW Auxiliary

Membership Counts

- ▣ MALTA is a true one for one membership count system / real time
- ▣ Annual members are counted in the Auxiliary they are in when the membership report is ran or where they are at as of June 30th for program year end
- ▣ Life members are counted in the Auxiliary they are in when the membership report is ran or where they are at as of June 30th for program year end
- ▣ When a member transfers, they are immediately recognized in the membership count of the Auxiliary they transferred into. Thus the member is immediately removed from the membership count of the previous Auxiliary when the member transfers.
- ▣ When a member is marked deceased, they are immediately removed from the membership count. Knowing a member is deceased and not marking them as deceased could be considered fraud.



VFW Auxiliary

Membership Counts

- ▣ Cancelled Auxiliaries
 - ▣ Members will automatically transfer to Department at Large.
 - ▣ This is why it is important to get members to transfer within their District prior to cancellation!
 - ▣ Get contact info for members before the Auxiliary cancels.





VFW Auxiliary

Membership Types

▣ Annual Members:

- ▣ Continuous
- ▣ Lapsed
- ▣ Rejoin
- ▣ Terminated
- ▣ When are dues accepted?

▣ Life Members:

- ▣ Additional Fees? (i.e. cancer insurance – Section 105)




Membership



VFW Auxiliary

Membership Forms

UNWAVERING SUPPORT

FOR UNCOMMON HEROES™

VFW Auxiliary
 REPORT NUMBER []
 20 [] **MEMBERSHIP SUMMARY**
 DEPARTMENT COPY

[] STATE [] DISTRICT [] LOCATION [] AUX. NO. [] DATE

ANNUAL MEMBERS		DUES THIS REPORT	
NEW.....	[]	NATIONAL.....\$	[]
REINSTATED.....	[]	DEPARTMENT.\$	[]
CONTINUOUS.....	[]	TOTAL.....\$	[]
TOTAL ANNUAL MEMBERS (THIS REPORT)	[]	<i>I CERTIFY THAT THE ANNUAL MEMBERS IN THIS REPORT HAVE PAID DUES TO 12/31 OF THE MEMBERSHIP YEAR LISTED ABOVE.</i>	
PREVIOUS BALANCE.....	[]		
TOTAL ANNUAL MEMBERS TO DATE... []	TO "PREVIOUS BALANCE" SECTION OF NEXT TRANSMITTAL	AUXILIARY TREASURER _____	
		ADDRESS _____	
CAUTION: DO NOT USE THIS FORM TO REPORT LIFE MEMBERS!!! TOTALS DO NOT INCLUDE LIFE MEMBERS.		CITY, STATE, ZIP _____	



VFW Auxiliary

Membership Forms



- ▣ Membership Update Form used to:
 - ▣ Update / change member record - name, address, phone, etc.
 - ▣ Annual continuous non-transferring member paying dues
 - ▣ Annual members converting to life
 - ▣ Send all credit card and ACH's to National HQ to process
 - ▣ Replacement of Annual or Life Membership card
 - ▣ Report the death of a member
 - ▣ Most of this can be accomplished on MALTA!



VFW Auxiliary Member Change/ Update Form

Rev. 8-18

REQUIRED FIELDS:

Member's Current Name _____ Membership ID No. _____
 Current Address _____
 E-mail Address _____ Phone Number (____) _____
 Current Auxiliary # _____ Department of _____ Date of Birth _____

NAME CHANGE Former Name: First _____ Last _____

ADDRESS CHANGE

CONTINUOUS ANNUAL DUES (We recommend using the Membership Summary Form for multiple dues payments.)

CONVERT TO LIFE MEMBER
 Life Membership Fee \$ _____

Check here if this is a gift. It will be mailed to the Auxiliary Treasurer.

Payment Methods:

Check: Make check payable to: **VFW Auxiliary**
 Credit Card VISA MasterCard Discover AMEX

Name as it appears on the card: _____
 Address associated with the card holder: _____

Credit Card Number _____

CVV Code _____ (3 digit code shown on back of credit card) Expiration _____ / _____
 Month / Year

Card Holder's Signature _____ Date _____

ACH (Bank withdrawal) Name of Bank _____ Routing Number _____

Attached voided check HERE (required) Account Number _____

REPLACE MY MEMBER CARD
 \$5 Annual \$10 Life

NAME CHANGES OR LOST CARD REQUESTS MUST BE ACCOMPANIED BY A CHECK made payable to VFW Auxiliary or complete the payment information above if using a credit card or ACH. Please send directly to National Headquarters at 406 W. 34th St., 10th Floor, Kansas City, MO 64111. You can also order a replacement card online in MALTA by visiting vfwauxiliary.org and selecting "Member Login."

DEATH REPORT Date of Death _____

LIFE MEMBERSHIP FEES	
Effective 1/1/2017	
Attained age at 12/31 of year applying for Life Membership.	
Through 20	\$253
21-25	\$242
26-30	\$230
31-35	\$219
36-40	\$213
41-45	\$201
46-50	\$196
51-55	\$184
56-60	\$173
61-65	\$161
66-70	\$150
71-75	\$132
76-80	\$109
81-85	\$86
86-90	\$69
91 and over	\$58



VFW Auxiliary

Membership Forms

- ▣ Membership Transfer / Application Form used to:
 - ▣ New Annual and Life Members
 - ▣ Send all credit card and ACH's to National HQ to process (**only available for life memberships**)
 - ▣ Rejoining Members (Annual and Life)
 - ▣ Annual Member Transfers
 - ▣ Paying and Nonpaying
 - ▣ Life Member Transfers



VFW AUXILIARY MEMBERSHIP / MEMBER TRANSFER APPLICATION

Recruited/Recommended by: _____ Recruiter Member ID _____
 Auxiliary No. _____ City _____ State _____ Member ID (if already a member) _____
 Annual Membership Life Membership
 Rejoin Membership Rejoined Previous Member ID No. _____ Previous Auxiliary _____
 Member at Large in Department of _____ Member at Large - VFW Auxiliary National Headquarters

THESE FIELDS REQUIRED

Name _____ Date of Birth _____
 Address _____ Male Female
 City _____ State _____ ZIP _____
 Phone _____ Email _____

POST-AFFILIATED (*Must be a member to the VFW Post affiliated with the Auxiliary to which you are applying.)
 Relationship _____ to Eligible Veteran* _____ VFW Membership ID _____
 LIFE MEMBER TRANSFER Previous Auxiliary _____
 ANNUAL TRANSFER Previous Auxiliary _____ Paying Nonpaying
 ANNUAL TRANSFER CONVERTING TO LIFE (Fill out Life Membership information below.) Previous Auxiliary _____

THESE FIELDS REQUIRED

NON-AFFILIATED (*Veteran is not a member of the VFW Post affiliated with the Auxiliary to which you are applying.)
 Relationship _____ to Eligible Veteran* _____ VFW Post (if applicable) _____
 Name of campaign ribbons or medals: _____
 Dates of Service: _____ to _____ Location: _____

Investigating Committee Signatures

1 _____ 2 _____ 3 _____
 Per Section 102 of the National Bylaws. Rejected Accepted Meeting Date _____ Obligated Date _____

LIFE MEMBERSHIP ONLY Check here if this is a gift.
Credit cards may NOT be used for initial payment of Annual Dues.
 Cash Check Visa MasterCard Discover AMEX
 Life Membership Fee _____
 Name on credit card _____
 Billing address for card _____
 City _____ State _____ ZIP _____
 Credit Card No. _____
 CVV Code _____ Exp. Date _____
 Signature _____ Date _____

LIFE MEMBERSHIP ONLY
 ACH (Bank withdrawl)
 Name of Bank _____
 Bank Routing No. _____
 Account No. _____
 Attach voided check HERE.
 (Required)

LIFE MEMBERSHIP FEES

Life Membership fees are not refundable.
 Attained age by 12/31 of year applying for Life Membership.

Through 20	\$253
21-25	\$242
26-30	\$230
31-35	\$219
36-40	\$213
41-45	\$201
46-50	\$196
51-55	\$184
56-60	\$173
61-65	\$161
66-70	\$150
71-75	\$132
76-80	\$109
81-85	\$85
86-90	\$69
91 and over	\$58

OBLIGATION In the presence of Almighty God and the members of this organization here assembled, I do of my own free will and accord, solemnly promise that I will never wrong or defraud this organization nor a member thereof nor permit either to be wronged if in my power to prevent it. I will never propose for membership any person not eligible, according to our Bylaws. I further state that I believe in God. I will be faithful to the United States of America, obedient to the laws and loyal to the Flag. Should my membership with this organization cease in any way, I will consider this obligation as binding outside of the organization as though I had remained a member. I do so promise.

I attest that I am a citizen of the United States or a U.S. National, and am at least 16 years of age. I further state that I believe in God. I pledge to comply with the National Bylaws of the Veterans of Foreign Wars of the United States Auxiliary. I attest I am not eligible for membership in the VFW. I further attest that the above is true and correct to the best of my knowledge, including my stated relationship to the Veteran.

Signature _____ (Must be signed by all members.)



VFW Auxiliary

Membership Forms

- ▣ Forms, Treasurer's Guide, and Training Documents can be found:
 - ▣ Department Treasurers
 - ▣ <https://vfwauxiliary.org/department-treasurer-resources/>
 - ▣ Auxiliary Treasurers
 - ▣ <https://vfwauxiliary.org/treasurer-resources/>



VFW Auxiliary

Membership Payments

- ▣ Annual
 - ▣ New members
 - ▣ Continuous non-transferring & transferring
 - ▣ Rejoining non-transferring & transferring
 - ▣ Converting to life
 - ▣ Transferring non-paying
 - ▣ For Continuous Annual members to pay with credit card, the member must log onto MALTA and pay through MALTA.
- ▣ Life (can use credit card or ACH to pay)
 - ▣ New members
 - ▣ Annual members (continuous or rejoining) converting to life.





VFW Auxiliary

The local Auxiliary has the right to possess a credit card acceptance machine. This is by vote of the local Auxiliary and with the understanding that the Auxiliary will assume all risk and fees associated with the credit card acceptance machine.



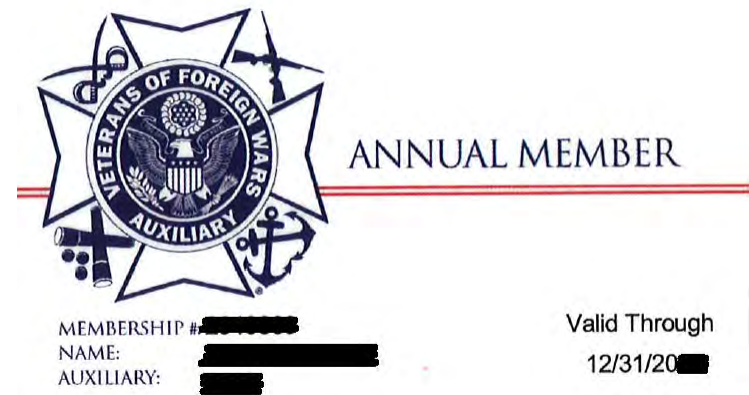


VFW Auxiliary

Annual Membership Cards

-Annual membership cards will be sent directly to the member approximately two weeks after the payment has been processed in MALTA.

-Temporary membership cards can be accessed in MALTA while waiting for membership card to arrive.



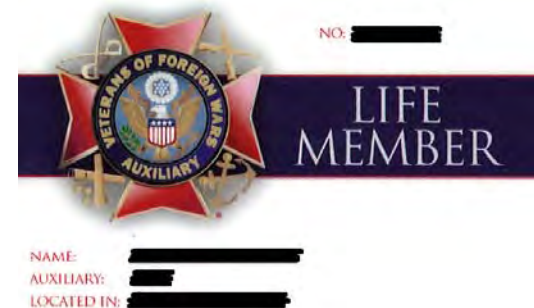
** If not received in 2 months by member – notify HQ. If 4 months elapses, must pay \$5 for new card



VFW Auxiliary

Life Membership Cards

- ▣ Card issued free of charge when life membership is purchased
 - ▣ If not received in 2 months by member – notify HQ. If 4 months elapses, must pay \$10 for new card
 - ▣ New life card issued free if transferring Auxiliaries
 - ▣ No card will automatically be issued for transfer to at large or transfer back to an Auxiliary where previously a member
- ▣ \$10 fee for replacement for:
 - ▣ Name change
 - ▣ Damaged / Lost / Stolen





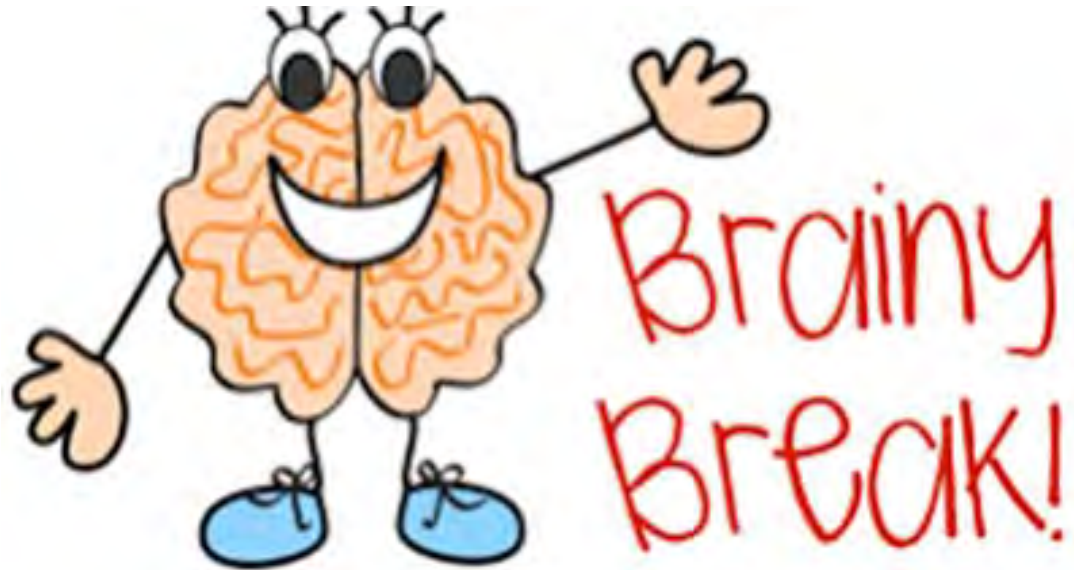
VFW Auxiliary

Life Membership Per Capita

- ▣ Life member per capita payout – 2x per year
 - ▣ January – All life members as of December 31st
 - ▣ August – Life memberships that were processed between January 1st and June 30th
 - ▣ Total payout as of January 2021 is \$9.00 per life member (previously it was \$8.70)
 - ▣ \$3.00 to each the Auxiliary, Department, and National
 - ▣ \$4.50 to the Department and National for DAL's



VFW Auxiliary



Unwavering Support for Uncommon Heroes tm



VFW Auxiliary

MALTA Website

VFW AUXILIARY
Member Portal

Home Profile Duties Resources Events Make Gift Reports

Home | Duties

Department Treasurer

Department Treasurer - Department of [REDACTED] Duties

Shortcuts



VFW Auxiliary

MALTA Website

Home Profile Duties Resources Events Make Gift Reports

Department Treasurer Department Secretary District Treasurer District Secretary Auxiliary President

Department of [REDACTED]

Shortcuts

-  [Process Dues](#)
-  [Reports](#)
-  [Receipts](#)
-  [Withdrawals by National](#)
-  [Deposits by National](#)
-  [Make a Gift](#)
-  [View Bond](#)



VFW Auxiliary

MALTA Website – Process Dues

Duties | Department Treasurer | Membership Dues

Process Membership Dues

NOTE: All dues recorded will be for the [REDACTED] Membership Year and Expire on December 31, [REDACTED]

Select Member(s): Unpaid Annual Members - List

Search by Auxiliary or Member at Large: Select Member Search Scope

Cancel Search

Continuous
Annual
Dues
Only!

Duties | Department Treasurer | Membership Dues

Process Membership Dues

NOTE: All dues recorded will be for the [REDACTED] Membership Year and Expire on December 31, [REDACTED]

Select Member(s): Unpaid Annual Members - List

Search by Auxiliary or Member at Large: Auxiliary

Auxiliary: Select Auxiliary

Cancel Search



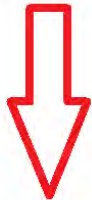
VFW Auxiliary

MALTA Website – Process Dues

Process Membership Dues

Recording the dues of a member on this page will result in a direct debit to the Department's bank account by National Headquarters.

NOTE: All dues recorded will be for the [REDACTED] Membership Year and Expire on December 31, [REDACTED]



Select how you would like to search for members:

All Unpaid Annual Members

Search by Auxiliary or Member at Large

Auxiliary

Auxiliary

MALTA Website
Auxiliary [REDACTED]

Search

*Bad addresses marked in red must be corrected before paying a members dues.

<input type="checkbox"/> Select All	Member ID	Last Name	First Name	Address Line 1	Address Line 2	City	State	Zip	Edit	Amount Due
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Dorothy	[REDACTED]	[REDACTED]	Elkhart	[REDACTED]	[REDACTED]	Edit Address	\$5.00
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Tammie	[REDACTED]	[REDACTED]	Elkhart	[REDACTED]	[REDACTED]	Edit Address	\$5.00
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Patricia	[REDACTED]	[REDACTED]	Elkhart	[REDACTED]	[REDACTED]	Edit Address	\$5.00
<input type="checkbox"/>	[REDACTED]	[REDACTED]	Amanda	[REDACTED]	[REDACTED]	Elkhart	[REDACTED]	[REDACTED]	Edit Address	\$5.00



VFW Auxiliary

MALTA Website

Home Profile Duties Resources Events Make Gift Reports

Department Treasurer Department Secretary District Treasurer District Secretary Auxiliary President

Department of [REDACTED]

Shortcuts

- 
[Process Dues](#)
- 
[Reports](#)
- 
[Receipts](#)
- 
[Withdrawals by National](#)
- 
[Deposits by National](#)
- 
[Make a Gift](#)
- 
[View Bond](#)



VFW Auxiliary

MALTA Website – Shortcuts – Reports

[Duties](#) | [Department Treasurer](#) | [All Reports](#)

Officer Reports

TOOL TIP: Search for a specific Member ID or Auxiliary Number by entering it into the Find|Next field.

Membership Counts	Dues & Member Changes	Entities	Officers
CMR - Paid Deceased/Cancelled	Dues Renewal Letter	Entities Not Bonded	Missing Officers Report
CMR - Conference Summary	Dues Paid By-Membership	Bonded Amounts	Officer Listing Report
CMR - Program Division	Deceased Members	Suspended Entities	Unpaid Officer Listing Report
	Transferred Members	Gift Detail	
	Member Contact Changes	Gift Conference Summary	
	Malta Activated Members	Delegate Strength	
	Membership Summary		
	Recruiter		



VFW Auxiliary

MALTA Website – Officer Reports – Membership Counts


- ▣ **Comprehensive Membership Report (CMR – Paid Deceased/Cancelled)**
 - Updated at midnight for that days activity
 - Choose date to run the report as of
 - Click “View Report”.
 - Current year numbers are hyperlinks to drill down to the detail
 - Current Members = True membership count
 - Paid Total = True membership count plus any members that were paid and then were deceased
 - Prior Year = Last program years true membership count












VFW Auxiliary

MALTA Website – Officer Reports – Membership Counts

CMR - Paid Deceased And Cancelled

Date  Department Member Type

Navigation:   of 1        Find | Next



CMR - Paid Deceased & Cancelled

As of midnight on

Includes deceased and cancelled members with paid dues

Department	Auxiliaries	Current Members	Annual Members	Life Members	Paid Total	Prior Year	Current %	Paid %
Alaska								
Alabama								
Arkansas								
Arizona								
California								
Colorado								
Connecticut								
Delaware								
Florida								
Georgia								
Hawaii								
Iowa								
Idaho								
Illinois								
Indiana								
Kansas								
Kentucky								
Louisiana								



VFW Auxiliary

MALTA Website – Officer Reports – Membership Counts

- Comprehensive Membership Report (CMR – Conference Summary)



Membership Report

Conference Summary

As of midnight on

Conference	Department	Total	Prior	Percent	Paid%
Big Ten	Iowa				
	Illinois				
	Indiana				
	Michigan				
	Minnesota				
	Missouri				
	Nebraska				
	Ohio				
	South Dakota				
	Wisconsin				
Conference Total					
Eastern	Connecticut				
	Delaware				
	Massachusetts				



VFW Auxiliary


MALTA Website – Officer Reports – Membership Counts

- ❑ Comprehensive Membership Report (CMR – Program Division)

CMR - Program Division

Date

Navigation: 1 of 1 100%



Membership Report

Program Division

As of midnight on

Program Division	Department	Total	Prior	Percent	Paid%
1	Hawaii				
	Idaho				
	Nevada				
	Rhode Island				
	Utah				
1					
Program Division	Department	Total	Prior	Percent	Paid%
2	Alaska				
	Delaware				
	Maine				



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

▣ Dues Renewal Letter

- 7/1 – 12/31 any annual unpaid members
- 1/1 – 6/30 any lapsed members

Dues Renewal Report

Auxiliary

District

Members At Large Only

* Leave organization field(s) empty to return results for all entities



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

Dues Renewal Letter

VFW AUXILIARY DUES RENEWAL NOTICE

██████████
██████████
██████████

Dear ██████████

Thank you for your support of Veterans of Foreign Wars Auxiliary ██████████ Your annual membership expired on December 31, ██████████ We invite you to reaffirm your pledge as our 491,000 members stand strong for America's veterans.

During the past year, you and your fellow VFW Auxiliary members:

- Provided \$4.6 million dollars in assistance to veterans, active-duty military, and their families
- Volunteered more than 815,000 hours in VA Medical Centers, hospitals, and other facilities
- Made more than 134,000 legislative contacts to help pass or block bills impacting veterans
- Distributed more than 378,000 United States flags in local communities
- Worked with more than 262,000 young people
- Awarded \$142,000 in scholarships

The dues amount for your annual membership is ██████████ To pay your dues, please cut out the portion (below), and mail it with a check or money order made payable to "VFW Auxiliary ██████████" to the following address:

██████████ Treasurer
██████████
██████████

You may also login to MALTA and pay your dues online. Visit www.vfwauxiliary.org and select Member Login.

Thank you again for supporting the VFW Auxiliary, and please renew your membership today!

Sincerely,

██████████
President, VFW Auxiliary ██████████

Please detach this portion below and mail it to the Treasurer listed above. Has anything changed below? Be sure to make your corrections here before mailing your payment.

██████████
██████████
██████████
Phone: ██████████
Email Address:

Member ID: ██████████
Amount Due for 20██ Membership: ██████████
Please make your check or money order payable to VFW Auxiliary ██████████



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

- **Dues Paid By-Membership**
- This reports assists Treasurers in seeing what memberships were paid directly by members or Auxiliaries
- Choose time period, who the membership was paid by, your Department, and which Auxiliary(s), and click View Report

Home | Reports | Paid By-Membership

Paid By-Membership

Start Date End Date Paid By

Department Auxiliary



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

Paid By-Membership

Start Date End Date Paid By

Department Auxiliary

Navigation icons: back, forward, search, refresh, zoom (100%), save, print, Find | Next



Paid By- Membership

5/1/ - 5/31/

Date Entity Member ID First Name Last Name Type Paid By Receipt No



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

▣ Deceased Members

- Allows user to run a report of members marked deceased during a time period
- Current year numbers are hyperlinks to drill down to the detail

Home | Reports | Deceased Members

Deceased Members Report

From To Membership Type

Department District Auxiliary

1 of 1 100% Find | Next

Deceased Members

Dept of

District	Auxiliary	Member Id	First Name	Last Name	Membership	Address	City	State	Zip	Reported On	Reported By
----------	-----------	-----------	------------	-----------	------------	---------	------	-------	-----	-------------	-------------



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

- Transferred Members

Reports | Transferred Members

List of Transferred Members by Entity

Tool Tip:
After running a report, you can search the results for a specific name, Member ID, or any other data in th

From Date: [Date Picker] To Date: [Date Picker]

Transfer Type:
Auxiliary:
Department:

- <Select a Value>
- Select All
- Transferred From
- Transferred To



Transferred Members - Report

Member Id	First Name	Middle Name	Last Name	Suffix	Membership Type	Transfer Date	Transferred From	Transferred T
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

- ☐ Member Contact Changes

Reports | Member Info/Contact Changes

Member Info/Contact Changes

Tool Tip:
After running a report, you can search the results for a specific name, Member ID, or any other data in the report by clicking on the magnifying glass icon.

Start Date: [] [] End Date: [] []
 Department: [] Auxiliary: []

1 of 2 ? 100% Find | Next

Member Info/Contact Changes

Change DateTime	Member ID	First Name	Middle Name	Last Name	Suffix	Department	Entity	Field	Old	New	Changed By
[]	[]	Bryan		[]		[]		Address: Line 1	[]	[]	[]
[]	[]	Bryan		[]		[]		Address: Postal Code	[]	[]	[]
[]	[]	Bryan		[]		[]		Member: First Name	[]	[]	[]
[]	[]	Vivian		[]		[]		Member: DOB	[] AM	[] 12:00:00 AM	National
[]	[]	Vivian		[]		[]		Member: Deceased Date	[]	[]	National
[]	[]	Vivian		[]		[]		Member: Is Deceased	[]	[]	National
[]	[]	Vivian		[]		[]		Member: Is Alternate	[]	[]	National
[]	[]	Vivian		[]		[]		Member: Is Delegate	[]	[]	National
[]	[]	Halle		[]		[]		Member: Activation Date	[]	[]	National



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

- MALTA Activated Members

Malta Activated Members

Department Auxiliary

Navigation icons: back, forward, search, refresh, home, zoom (100%), save, print



List of MALTA Activated Members

Dept	Aux	Member ID	Member Name	Officer	Age	Malta Activation Date



VFW Auxiliary

MALTA Website – Officer Reports – Dues & Member Changes

- ▣ Membership Summary
- ▣ Similar to CMR but use can choose what organizations to return

Membership Summary

Membership Year	<input type="text"/>	←	→	<input type="checkbox"/>	Show Auxiliaries
Department(s)	<input type="text" value="Select Departments"/>	←	→	<input type="checkbox"/>	Show Districts
District	<input type="text" value="Select Districts"/>	←	→	<input type="checkbox"/>	Show Department At Large
Auxiliary	<input type="text" value="Select Auxiliaries"/>	←	→	<input type="checkbox"/>	Show National At Large
<input type="button" value="Search"/> <input type="button" value="Close"/>					



VFW Auxiliary

MALTA Website – Officer Reports – Officers

Recruiter

Reports | Recruiter

Membership – Recruiter

Tool Tip:
After running a report, you can search the results for a specific name, Member ID, or any other data in the report by using "Find | Next". The Find | Next sea

Start Date: [Redacted] End Date: [Redacted]
Member Type: All Members At Large Only: No Member with Bad Address: No
Department: [Redacted] District: [Redacted] Auxiliary: [Redacted]

Navigation: 1 of 2? 100% Find | Next

Membership – Recruiter

Year	Department Code	Auxiliary Number	Auxiliary Name	Member ID	Last Name	First Name	Middle Name	Address 1	Address 2	City	State	ZIP	Email	Phone	Recruiter ID	Recruiter Name	Membership Start Date
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]



VFW Auxiliary

MALTA Website – Officer Reports – Entities

Entities Not Bonded

Reports | Not Bonded Entities

Not Bonded Entities

Tool Tip:
After running a report, you can search the results for a specific name, Member ID, or any other data in the report by using "Find | Next". The Fin

Bond Year Department Entities to Include

- (Select All)
- Department
- District
- County Council
- Auxiliary




VFW Auxiliary

MALTA Website – Officer Reports – Entities

- Suspended Entities
- Returns a list of entities under suspension in the Department
- Click the “+” to get the detailed information

Suspended Entities


1 of 1 100% Find | Next



Suspended Entities

MALTA Website – Reports – Pai...

Department	Total Entities	Entity Code	Entity Name	Date Suspended	Reason	Notes	Review Date
█	2	█	█	█	Failure to File Audit, Failure to Hold Regular Meetings with Quorum, Failure of Officers to Fulfill Duties	█ suspended the Auxiliary for 90 days so that assistance could be provide to get the Auxiliary "healthy" once again. President and Treasurer had not yet paid their █ dues. Dist. President can't get annual visit scheduled.	█
		█	█	█	Missing Officers, Failure to Hold Regular Meetings with Quorum	█ suspended the Aux. for 90 days for failure to hold regular meetings with quorum. Missing Treasurer. Dist. President cannot make official visit. Aux. needs to work to meet 5 essentials and become a healthy Aux or begin steps in Section 207 to surrender charter.	█





VFW Auxiliary

MALTA Website – Officer Reports – Entities

- ▣ Gift Detail
- ▣ Cancer Aid & Research, Health & Happiness, or Patriotic Art
 - Choose the fund, month, program year and which entities to include

Home | Reports | Gift Detail

Gift Detail

Fund: <Select a Value> Program Month: January Program Year: [REDACTED]

Included Entities: Department, District, County Council

- (Select All)
- Department
- District
- County Council
- Auxiliary
- Members



VFW Auxiliary

MALTA Website – Officer Reports – Entities

Gift Detail

Fund: Cancer Aid & Research Program Month: January Program Year: [REDACTED]

Included Entities: Department, Auxiliary, Members

1 of 1 100% Find | Next

Gift Detail - January [REDACTED]
Cancer Aid & Research

Department	Entity Code	Entity Name	MTD	YTD
Ohio	[REDACTED]	[REDACTED]	-	\$580.00
	Date	Receipt	Month Amount	Year Amount
	9/5/[REDACTED]	771	-	\$580.00
	[REDACTED]	[REDACTED]	-	\$446.00
	[REDACTED]	[REDACTED]	-	\$1,220.00
	[REDACTED]	[REDACTED]	-	\$678.00
	[REDACTED]	[REDACTED]	-	\$160.00
	[REDACTED]	[REDACTED]	-	\$436.00
	[REDACTED]	[REDACTED]	-	\$624.00



VFW Auxiliary

MALTA Website – Officer Reports – Entities

- ▣ **Gifts Conference Summary**
- ▣ **Cancer Aid & Research**
 - Cancer Aid & Research donations by month, conference and Department
 - Gifts support cancer grants and donations to cancer research facilities
- ▣ **Health & Happiness**
 - Health and Happiness / Christmas Cheer / National Home donations by month, conference and Department
 - Gifts go to support
 - Upkeep of the buildings the VFW Auxiliary sponsors at the National Home
 - Christmas gifts for children of the National Home
 - Graduation gifts for children of the National Home





VFW Auxiliary

MALTA Website – Officer Reports – Gift Conference Summary

- ▣ **Patriotic Art**
 - Patriotic Art donations by month, conference and Department
 - Gifts support scholarships to winners of the Young American Creative Patriotic Art Contest

Department Treasurer | Reports | Gift Conference Summary

Gift Conference Summary

Fund Program Month Program Year

Cancer Aid & Research
Health & Happiness
Patriotic Art



VFW Auxiliary

Cancer Aid & Research

- ▣ Gifts for Cancer Aid & Research used to:
 - Provide cancer grants to members
 - Grants to institutions for cancer research
- ▣ Gifts for Cancer Aid & Research may be sent by the Auxiliaries directly to National HQ
- ▣ If Department receives gifts for CAR, promptly forward to National HQ





VFW Auxiliary

Cancer Grants

- ☐ Cancer Grant form available on website
 - www.vfwauxiliary.org
 - Click on Member Benefits

VFW Auxiliary | Unwavering Support for Uncommon Heroes® 816.561.8655

VFW AUXILIARY
UNWAVERING SUPPORT FOR UNCOMMON HEROES®

HOME JOIN US ABOUT US WHAT WE DO EVENTS SCHOLARSHIPS BLOG MEDIA CONTACT US MEMBER LOGIN

2015-2016 National President Francisca Guilford

Join Us
AND SERVE AMERICA'S UNCOMMON HEROES

Explore our National Programs

For more than 100 years, the VFW Auxiliary has been fulfilling its original objectives by supporting the [Veterans of Foreign Wars](#), serving veterans, active-duty military and their families, and spreading patriotism nationwide.

Our members have volunteered millions of hours, donated millions of dollars and honored hundreds of thousands of veterans. [Volunteer with us](#) and celebrate the freedoms we enjoy in America.

[Auxiliary Locator](#) [Member Benefits](#) [VFW Store](#) [VFW National Headquarters](#)



VFW Auxiliary

Cancer Grants

☐ Look under
Additional
Benefits

☐ Only this version
of the cancer
grant will be
accepted

VFW AUXILIARY
UNWAVERING SUPPORT FOR UNCOMMON HEROES®

HOME JOIN US ABOUT US WHAT WE DO EVENTS SCHOLARSHIPS BLOG MEDIA CONTACT US MEMBER LOGIN

Home / Member Benefits

The VFW Auxiliary is pleased to offer our members access to one of the nation's largest networks of money-saving products and services in the insurance and benefits industry.

- Insurance Plans**
 - [Auto and Home Insurance](#)
 - [Term Life Insurance](#)
 - [Guaranteed Issue Term Life Insurance](#)
 - [Long Term Care Insurance](#)
 - [Medicare Supplement Insurance](#)
 - [Dental Insurance](#)
 - [Cancer/Critical Illness Insurance](#)
- Additional Benefits**
 - [Cancer Grants](#)
 - [Dental & Vision Discounts](#)
 - [Hearing Plans – Hear in America](#)
 - [Prescription Savings – Rx Savings Card](#)
 - [Life Line Screening](#)
 - [ID Theft Protection](#)
 - [Pet Insurance](#)
 - Hartford Travel Accident Insurance
 - Hartford All Accident Insurance
 - Genworth Long Term Care
 - Hospital Indemnity
- Travel Benefits**
 - [Comfort Tours](#)
 - [Cruise Holidays](#)
 - [Veterans Holidays](#)

VFW Auxiliary BenefitHub
[Discounts on various products and services, benefits, insurance and professional advice.](#)

VFW Auxiliary American Express Card or MasterCard

SHOW YOUR SUPPORT WITH THE VFW AUXILIARY ISSA REWARDS™ CREDIT CARD
Available on both American Express® Card and MasterCard®
Apply Now



Cancer Grant Application

Instructions:

- * Member must meet eligibility requirements below.
- * Member and Physician sections must be completed legibly and in their entirety. If member is unable to sign, a Power of Attorney (POA) may sign. If POA signs, then POA documentation must be submitted.
- * If the member is deceased, next of kin may submit application with documentation of proof of death such as obituary, doctor's letter, death certificate, etc. Application and proof of death must be received at VFW Auxiliary National Headquarters within 30 days of member's passing.
- * Grants will ONLY be made payable to the VFW Auxiliary member.
- * Do NOT send any other supporting documents, as it will not be considered.
- * Mail original, completed application to:

VFW Auxiliary National Headquarters
 Attn: Cancer Grants
 406 West 34th Street, 10th Floor
 Kansas City, MO 64111



Eligibility Requirements:

- 1) Applicant must be a member of the VFW Auxiliary for one (1) full year and current dues must be paid.
- 2) After twelve (12) months have passed from date of diagnosis or last treatment, application will be rejected.
- 3) A member is allowed two grants during lifetime.

Twelve (12) months must elapse between new diagnosis and/or treatment from date of first grant.

Continuous treatment which lasts beyond the twelve (12) month period may qualify for a second grant.

THIS SECTION IS TO BE FILLED OUT BY MEMBER	THIS SECTION IS TO BE FILLED OUT BY ATTENDING PHYSICIAN
Membership ID #	Type of cancer diagnosed
Auxiliary Post #	Date diagnosed with this cancer (MM/DD/YYYY)
Member's Name (as shown on membership card)	Last date of treatment for this cancer (MM/DD/YYYY)
Date of Birth (MM/DD/ YYYY)	Physicain's Office / Hospital Name
Email Address	Phone Number
Phone Number	Physician's Name
Street Address	Street Address
City, State and ZIP Code	City, State and ZIP Code
Date Member Signed (MM/DD/YYYY)	Date Physician Signed (MM/DD/YYYY)
Member's Signature	Physician's Signature

By submission of this application, you grant authority for the VFW Auxiliary to contact the attending physician. If grant is approved, funds must be deposited within six months or the grant is forfeited. REV. 6-18



VFW Auxiliary

Cancer Insurance Program

- ❑ Cancer Insurance Program is **not** administered by National Headquarters
- ❑ AMWINS handles all Cancer Insurance Questions

AMWINS

P.O. Box 535007

Grand Prairie, TX 75053

1-800-550-5287 8am to 8pm (Eastern), M-F



VFW Auxiliary

Gifts to VFW National Home (Health & Happiness)

☐ Gifts are used for:



VFW NATIONAL HOME FOR CHILDREN
HELP HOPE HONOR

- Christmas & graduation gifts
- Certain repairs & maintenance at the VFW National Home
- Other expenditures approved by the National Council of Administration

☐ Gifts are to be sent from the Auxiliaries directly to National Headquarters



VFW Auxiliary

MALTA Website – Officer Reports – Delegate Strength

- ▣ National Convention
 - Lists of Auxiliaries that have input Delegates and Alternates into MALTA

Events - Delegates Strength

Department
 Event
 |< < 1 of 1 > >|



Delegate Voting Strength

Total Allowed Delegates **91**
 Delegate Voting Strength **68**

Department of	Auxiliary	Allowed	Assigned
		2	0
		2	0
		3	3
		2	2
		3	0
		2	2
		3	3



VFW Auxiliary

MALTA Website – Officer Reports – Officers

- **Missing Officers Report**
- Choose which program year, what organization level
- To see all organizations, Top Level = Department, Organization = Your Department, Organizations to include = All, and click View Report

Missing Officers Report

Program Year Officers ▼ Top Level ▼ Organization ▼ Organizations to Include

1 of 1 100% Find | Next

Incomplete Installations

Department Name	Department Code	Organization Name	Organization Code	Incomplete Installations
-----------------	-----------------	-------------------	-------------------	--------------------------



VFW Auxiliary

MALTA Website – Officer Reports – Officers


- **Officer Listing Report**
- Returns contact information for officers
- To see all organizations, Top Level = Department, Positions = All, Organization = Your Department, Organizations to include = All, and click View Report

Home | Reports | Officer Listing Report

Officer Listing Report

As Of: 5/11/2011 [calendar icon] Top Level: Department [dropdown] Positions: President, Senior Vice President, Ju [dropdown]
Organization: [dropdown] Organizations to include: Department, District, County Coun [dropdown]

Navigation: [back] [forward] [1] of 1 [refresh] [undo] [100%] [print] [Find | Next]



Officer Listing

Member ID	First Name	Last Name	Title	Department	Entity	Code	Address Line 1	Address Line 2	City	State	Zip	Phone	Email
-----------	------------	-----------	-------	------------	--------	------	----------------	----------------	------	-------	-----	-------	-------



VFW Auxiliary

MALTA Website – Officer Reports – Officers

- **Unpaid Officer Listing Report**
- Returns a list of officers that have not paid their current years dues
- To hold office members must be in good standing and not a lapsed status
- To see all organizations, Top Level = Department, Positions = All, Organization = Your Department, Organizations to include = All, and click View Report



VFW Auxiliary

MALTA Website

Home Profile Duties Resources Events Make Gift Reports

Department Treasurer Department Secretary District Treasurer District Secretary Auxiliary President

Department of [REDACTED]

Shortcuts

 [Process Dues](#)  [Reports](#)  [Receipts](#)  [Withdrawals by National](#)  [Deposits by National](#)  [Make a Gift](#)  [View Bond](#)



VFW Auxiliary

MALTA Website – Receipts

Duties | Department Treasurer | Payment History

Payment History

Payment Type	Payment Date	Payment Method	Receipt Number	Purchase Amount	Recorded By	Actions
Bond	7/8/████	eCheck/ACH	1-████	\$1,030.00	██████████	Click to Void
New Membership	6/30/████	eCheck/ACH	7-████	\$5.00	██████████	Batch Closed
New Membership	6/24/████	eCheck/ACH	7-████	\$109.00	██████████	Batch Closed
Mass Dues	6/24/████	eCheck/ACH	8-████	\$10.00	██████████	Batch Closed
Card Replacement	6/12/████	eCheck/ACH	6-████	\$5.00	██████████	Batch Closed
New Membership	6/12/████	eCheck/ACH	7-████	\$5.00	██████████	Batch Closed
Life Membership	6/6/████	eCheck/ACH	3-████	\$150.00	██████████	Batch Closed
New Membership	6/6/████	eCheck/ACH	7-████	\$5.00	██████████	Batch Closed
New Membership	6/5/████	eCheck/ACH	7-████	\$173.00	██████████	Batch Closed
New Membership	6/5/████	eCheck/ACH	7-████	\$10.00	██████████	Batch Closed
Mass Dues	6/5/████	eCheck/ACH	8-████	\$10.00	██████████	Batch Closed

NOTE: Only able to void same day transactions!



VFW Auxiliary

MALTA Website

Home Profile Duties Resources Events Make Gift Reports

Department Treasurer Department Secretary District Treasurer District Secretary Auxiliary President

Department of ██████████

Shortcuts

 [Process Dues](#)  [Reports](#)  [Receipts](#)  [Withdrawals by National](#)  [Deposits by National](#)  [Make a Gift](#)  [View Bond](#)



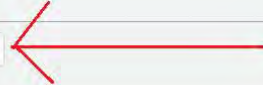


VFW Auxiliary

MALTA Website – Withdrawals by National

[Home](#) | [Officers](#) | [Department Treasurer](#) | [Receipts](#)

Withdrawals by National



Payment Date	Annual	Life	Bonds	Gifts	Events	Cards	Total
04/23/2018	\$40.00	\$161.00	-	-	-	-	\$201.00
04/15/2018	\$125.00	-	-	-	-	-	\$125.00
03/25/2018	\$10.00	\$132.00	-	-	-	-	\$142.00
03/18/2018	\$20.00	-	-	-	-	-	\$20.00
02/25/2018	\$10.00	-	-	\$10.00	-	-	\$20.00
02/13/2018	\$20.00	-	-	-	-	-	\$20.00
02/11/2018	\$30.00	-	-	-	-	-	\$30.00
01/30/2018	\$25.00	-	-	-	-	-	\$25.00
01/28/2018	\$10.00	-	-	-	-	-	\$10.00
01/21/2018	\$90.00	-	-	-	-	-	\$90.00
01/12/2018	\$15.00	-	-	-	-	-	\$15.00
12/31/2017	\$5.00	-	-	-	-	-	\$5.00
12/30/2017	\$130.00	-	-	\$45.80	-	-	\$175.80
12/29/2017	\$5.00	-	-	-	-	-	\$5.00
12/26/2017	\$330.00	\$368.00	-	-	-	-	\$698.00



VFW Auxiliary

MALTA Website

Home Profile Duties Resources Events Make Gift Reports

Department Treasurer Department Secretary District Treasurer District Secretary Auxiliary President

Department of [REDACTED]

Shortcuts

 [Process Dues](#)  [Reports](#)  [Receipts](#)  [Withdrawals by National](#)  [Deposits by National](#)  [Make a Gift](#)  [View Bond](#)





VFW Auxiliary

MALTA Website – Deposits by National

Home | Officers | Department Treasurer | Deposits

Deposits by National

←

Payment Date	Dues Type	Payment Total
4/9/2018	Dues	\$30.00
3/12/2018	Dues	\$185.00
2/7/2018	Dues	\$215.00
2/7/2018	Awards	\$200.00
1/29/2018	Dues	\$1,800.00
1/24/2018	Life Payout	\$6,990.84
12/18/2017	Dues	\$505.00
11/21/2017	Dues	\$990.00
11/8/2017	Awards	\$100.00
10/27/2017	Dues	\$975.00
9/29/2017	Dues	\$435.00
9/15/2017	Life Payout	\$34.30

[Download PDF](#) [Download Excel](#)



VFW Auxiliary

MALTA Website

Home Profile Duties Resources Events Make Gift Reports

Department Treasurer Department Secretary District Treasurer District Secretary Auxiliary President

Department of ██████████

Shortcuts

Process Dues	Reports	Receipts	Withdrawals by National	Deposits by National	Make a Gift	View Bond



VFW Auxiliary

MALTA Website - Gifts

Make a Gift - Department of [REDACTED]

Make a Gift payment from

Department
Department
Auxiliary

Make a Gift

Gift History By Year

Year	Fund	Amount	Date	Processed By
Profile Duties Resources Events Make Gift Reports				

Duties | Department Treasurer | Gift | Payment

Make a Gift Payment for Department of [REDACTED] on behalf of an Auxiliary

Enter Auxiliary Number:

Add

Auxiliary	Fund	Amount
88 - Wade E Harris Auxiliary 88	Cancer Aid & Research	\$
88 - Wade E Harris Auxiliary 88	Health & Happiness	\$
88 - Wade E Harris Auxiliary 88	Patriotic Art	\$
	Total Gift Amount	\$0.00

Payment Method *

-- Payment Method --

I hereby agree to the terms and conditions of purchase.

[Read terms and conditions](#)

Notice: To prevent the possibility of double charges, please do not click the payment button twice. And do not click the back button, or refresh your browser until you get the receipt.

Make Gift Payment

Cancel



VFW Auxiliary

MALTA Website – Manage Members

Department Treasurer Department Secretary District Treasurer District Secretary Auxiliary President

Department of ██████████

Shortcuts



[Process Dues](#)



[Reports](#)



[Receipts](#)



[Withdrawals
by National](#)



[Deposits by
National](#)



[Make a Gift](#)



[View Bond](#)



Manage Members

1. [View Members](#)
2. [New Membership](#)
3. [Rejoin Member](#)
4. [Process Dues](#)
5. [Convert to Life](#)
6. [Transfer Members](#)
7. [Address Labels](#)
8. [Phone & Email List](#)
9. [Order Membership Cards](#)
10. [Print Member Cards](#)
11. [Event Registration](#)



VFW Auxiliary

MALTA Website – Manage Members – View Members

Members of Department of [REDACTED]

Member ID

First Name

Last Name

Auxiliary

District

Membership Type

Members At Large Only

- Select Membership Type
- All Active Members
- Life Members
- Annual Members
- Unpaid/Lapsed Members
- Former Members
- Deceased Members



VFW Auxiliary

MALTA Website – Manage Members – View Members

Members of Department of [REDACTED]

Member ID:

First Name:

Last Name:

Auxiliary:

District:

Membership Type:

Members At Large Only:

District	Auxiliary	Member ID	First Name	Last Name	Membership	Expiration Date	Phone Number	Current Address	Action
-	-	[REDACTED]	[REDACTED]	Adams	Life Member	N/A	-	[REDACTED]	<input type="button" value="Edit"/> <input type="button" value="Bad Address"/>
-	-	[REDACTED]	[REDACTED]	Albertson	Life Member	N/A	-	[REDACTED]	<input type="button" value="Edit"/> <input type="button" value="Bad Address"/>
-	-	[REDACTED]	[REDACTED]	Alder	Life Member	N/A	-	[REDACTED]	<input type="button" value="Edit"/> <input type="button" value="Bad Address"/>
-	-	[REDACTED]	[REDACTED]	Alexander	Life Member	N/A	-	[REDACTED]	<input type="button" value="Edit"/> <input type="button" value="Bad Address"/>
-	-	[REDACTED]	[REDACTED]	Allman	Life Member	N/A	-	[REDACTED]	<input type="button" value="Edit"/> <input type="button" value="Bad Address"/>
-	-	[REDACTED]	[REDACTED]	Almon	Life Member	N/A	-	[REDACTED]	<input type="button" value="Edit"/> <input type="button" value="Bad Address"/>
-	-	[REDACTED]	[REDACTED]	Altom	Life Member	N/A	-	[REDACTED]	<input type="button" value="Edit"/> <input type="button" value="Bad Address"/>
-	-	[REDACTED]	[REDACTED]	Anderson	Life Member	N/A	(405) 282-6105	[REDACTED]	<input type="button" value="Edit"/> <input type="button" value="Bad Address"/>

Click on “Edit” to update member information or to decessate the member.



VFW Auxiliary

MALTA Website –
Manage Members –
View Members

Update Member Info

First Name *

Middle Name

Last Name * Martin

Suffix Select Suffix

Gender * Female

Date of Birth

Email Address

Telephone (816) 561-8655

Address Line 1 * 1321 Burlington Street

Address Line 2 Suite M

Country * United States

City * Kansas City

State * MO

Zip/Postal Code * 64116

Deceased

Deceased Date (Optional / If Known)

Seasonal Address

Mark as Bad Address

Save Cancel



VFW Auxiliary

MALTA Website – Manage Members – New Membership

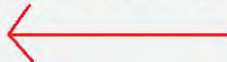
[Home](#) | [Duties](#) | [Department Treasurer](#) | [Process New Membership](#)

Process New Membership

On this form you will input new members of your Department. Please have their information readily available. Once you have input these members, their dues for the Department of [REDACTED] and National Office will be automatically debited from the bank account of Department of [REDACTED] on file.

[Add Member](#)

[Rejoin Member](#)





VFW Auxiliary

MALTA Website – Manage Members – New Membership

VFW AUXILIARY Member Portal

Home | Duties | Department Treasurer | Process New Membership

Process New Membership

On this form you will input new members of your Department. Please have a credit card ready as the fee will be automatically debited from the bank account of Department of [redacted]

[Add Member](#) [Rejoin Member](#)

Links

- Auxiliary Academy
- Forms/Documents
- Membership Resources
- Program & Publicity Resources
- Emblem Branding Center

Input New Member

Membership Type *

Member of what entity *

First Name *

Middle Name

Last Name *

Suffix

Gender *

Date of Birth *

Email Address *
 No Email

Telephone *
 No Phone

Address Line 1 *

Address Line 2

Country *

City *

State *

ZIP/Postal Code *



VFW Auxiliary

MALTA Website – Manage Members – New Membership

Profile Duties Resources Events Make Gift Reports

Duties Department Treasurer | Process New Membership

Process New Membership

On this form you will input new members of your Department. Please have a credit card ready as membership dues will be automatically debited from the bank account of Department of Kansas 0

[Add Member](#) [Rejoin Member](#)

Links

- Online Auxiliary Academy
- Forms/Documents
- Membership Resources
- Program & Publicity Resources
- Emblem Branding Center

Suffix

Gender *

Date of Birth *

Email Address *
 No Email

Telephone *
 No Phone

Address Line 1 *

Address Line 2


Country *

City *

State *

ZIP/Postal Code *

Recruiter Member ID

 [Save](#) [Save and Add Member](#) [Cancel](#)



VFW Auxiliary

MALTA Website – Manage Members – New Membership

- Clicking “Save” will put the member to hold in your shopping cart.
 - You will need to click “Complete Membership” to pay for the member.

Process New Membership

On this form you will input new members of your Department. Please have their information readily available. Once you have input these members, their dues for the Department of [REDACTED] and National Office will be automatically debited from the bank account of Department of [REDACTED] on file.

Add Member

Rejoin Member

Membership Type	First Name	Middle Name	Last Name	Suffix	Date Of Birth	Recruiter	Amount Due National	Amount Due Department	
Life	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	\$150.00	\$0.00	Edit Delete
Life	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	\$150.00	\$0.00	Edit Delete
Total Amount to be Debited From Department Bank Account:								\$300.00	

Notice: To prevent the possibility of double charges, please do not click the payment button twice. And do not click the back button, or refresh your browser until you get the receipt.

Complete Membership

Cancel

- Clicking “Save and Add Member” will add the member to your shopping cart and clear the form for you to add additional new members. You will need to click “Complete Membership” to pay for your new members.



VFW Auxiliary

MALTA Website – Manage Members – New Membership

▣ Data Entry Standards

- Do not enter information in all capitals

Incorrect Examples

- a. MARY BROWN
- b. KANSAS CITY

Correct Examples

- a. Mary Brown
- b. Kansas City



- Do not add Ms, Miss, Mrs, Dr, Rev, etc. to any names



VFW Auxiliary

MALTA Website – Manage Members – New Membership

Data Entry Standards

- When entering an address:
 - Enter Drive, Street, Avenue, Lane, Terrace, etc.
 - Enter PO Box on address line 1
 - Enter apartment, lot, or suite numbers on address line 1
- Do not add Deceased (or any other notes) anywhere on the member profile



VFW Auxiliary

MALTA Website – Manage Members – Rejoin Member

Rejoin Member

To locate a former Member, enter their Member ID and click on Find Member.

If you do not have the former Member's Member ID, enter their contact information (e.g. First Name and Last Name) that was valid during their former membership, even if this information has since changed and click on Find Member. You will be able to update the current Member's information once you locate their original record.

If you are unable to locate the former Member, please contact the VFW Auxiliary National Office at (816) 561-8655 for assistance.

Member ID

First Name

Last Name

Auxiliary Number

Department

Telephone

Address Line 1

Address Line 2

Country

City

State

Postal Code

Rejoin Member

Member ID:

Member Name:

Previous Department:

Previous Auxiliary:

Phone:

Member Address:

Rejoin Member

Membership Type *

Member of what entity *

First Name *

Middle Name

Last Name *

Suffix

Gender *

Date of Birth *

Email Address *

No Email

Telephone *

No Phone

Address Line 1 *

Address Line 2

Country *

City *








VFW Auxiliary

MALTA Website – Manage Members – Process Dues

- ❑ Topic was previously discussed as the first Shortcut icon is Process Dues

Shortcuts

 Process Dues	 Reports	 Receipts	 Withdrawals by National	 Deposits by National	 Make a Gift	 Print Bond
--	---	--	--	--	---	--



VFW Auxiliary

MALTA Website – Manage Members – Convert to Life

Convert Members to Life

MemberID

FirstName


LastName



VFW Auxiliary

MALTA Website – Manage Members – Convert to Life

Convert Members to Life

MemberID 
FirstName
LastName

Selected Member

Member ID	Member Name	Is this a Gift?	Amount	Action
██████████	██████████	<input type="checkbox"/>	\$230.00	Remove

Total Amount: \$230.00

Payment Method *

If the life membership is a gift, the card will go to the Auxiliary Treasurer.



VFW Auxiliary

MALTA Website – Manage Members – Transfer Members

Transfer Members Department of [REDACTED]

Member ID *

Transfer Members Department of [REDACTED]

Member ID *

Member Details

**Bad addresses marked in red must be corrected*

Member ID	Current Auxiliary	Type	Member Name	Email	Phone Number	Address	Contact Info
[REDACTED]	[REDACTED] Auxiliary	Life	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Edit <input type="button" value="Convert to Member at Large"/>

Transfer to Auxiliary

Auxiliary Number *

** Dept. Treas. can only transfer members within their own Department.

*** If the transferring member holds an office, the office role must be terminated first.



VFW Auxiliary

MALTA Website – Manage Members – Address Labels

Address Labels

Member Status
Auxiliary Search
District Search
Members At Large Only

Select Membership Type

- Select Membership Type
- All Active Members
- Life Members
- Annual Members
- Unpaid/Lapsed Members
- Former Members
- Deceased Members



VFW Auxiliary

MALTA Website – Manage Members – Address Labels

Address Labels

Member Status
Auxiliary Search
District Search
Members At Large Only

List of Compatible Products

Manufacturer: Avery

Products 15160, 15510, 15660, 16460, 18160, 18260, 18660, 28660, 32660, 38260, 45160, 48160, 48260, 48360, 48460, 48860, 48960, 5160, 5260, 55160, 5520, 55260, 55360, 5620, 5630, 5660, 5810, 58160, 58260, 58660, 5960, 6240, 6241, 6970, 75160, 8160, 8250, 8460, 85560, 8620, 8660, 8810, 88560, 8860, 8920, 80509, 8215, 95915, 22837

Close

Attention: The labels produced are compatible with Address Labels that are 1" X 2 5/8 and 30 per sheet in a 3 by 10 configuration. [List of Compatible Products](#)

When printing mailing labels, be sure to print using **Actual Size**. This means you may need to clear any options or properties that scale, shrink, or fit to size. If you are having issues with the alignment of the labels, please contact the MALTA Support Team.

Print Address Labels Download PDF Download CSV Download Excel

District	Auxiliary	Member ID	Last Name	First Name	Current Address
----------	-----------	-----------	-----------	------------	-----------------



VFW Auxiliary

MALTA Website – Manage Members – Member Phone List

Member Phone List

Member Status: Unpaid/Lapsed Members

Auxiliary Search: Select Membership Type

District Search: All Active Members, Life, Annual, Unpaid/Lapsed Members, Former Members, Deceased Members

Member Phone List

Member Status: Unpaid/Lapsed Members

Auxiliary Search: Select Auxiliaries

District Search: Select Districts

[Search](#) [Close](#)

[Print](#) [Download CSV](#) [Download Excel](#)

Auxiliary Number	District	Member ID	First Name	Last Name	Phone Number	Phone Number 2
-	-	██████	██████	██████	-	-
-	-	██████	██████	██████	-	-



VFW Auxiliary

MALTA Website – Manage Members – Order Membership Cards

Home | Officers | Department Treasurer | Membership Card

Order Membership Cards

Search By Member ID / Name

Annual Replacement Cards = \$5.00

Life Replacement Cards = \$10.00



VFW Auxiliary

MALTA Website – Manage Members – Order Membership Cards

Order Membership Cards

Search By Member ID / Name

List of Members for Replacement Card

Member ID	First Name	Last Name	Card Type	Cost	
██████	██████	██████	Life	\$10.00	Remove
				Total Cost: \$10.00	



VFW Auxiliary

MALTA Website – Manage Members – Print Membership Cards

[Duties](#) | [Department Treasurer](#) | [Print Membership Card](#)

Print Membership Cards

Tool Tip: To print cards for multiple members, leave the Member ID and Name fields blank and just click the search button. This will provide a list of all member, allowing you to print for more than one member at a time.

Member ID	<input type="text" value="Member ID"/>
First Name	<input type="text" value="First Name"/>
Last Name	<input type="text" value="Last Name"/>
Auxiliary	<input type="text" value="Select Auxiliary"/>
	<input type="button" value="Search"/> <input type="button" value="Cancel"/>



VFW Auxiliary

MALTA Website – Manage Members – Print Cards

Print Membership Cards

Member ID

First Name

Last Name

Auxiliary

Search Result

Select All

Member ID	Member Name
████████	████████████████



VFW Auxiliary

MALTA Website – Manage Members – Event Registration

[Home](#) | [Officers](#) | [Department Treasurer](#) | [Events](#) | [Register Member for Events](#)

Available Events for Member Registration

[2018 National Convention - Kansas City, MO](#)

Join 3,000 VFW Auxiliary members for the 105th National Convention, July 21-25, 2018 in Kansas City, Missouri. Kansas City is home to VFW ...

Start Date: Jul 21, 2018
End Date: Jul 25, 2018
Time: All Day
Cost: Early Bird Registration \$25.00
On-Site Registration \$35.00



[Read More](#) [Register](#)

Online Registration Ends May 31, 2018

[2018 C.A.F.E. - Gettysburg, PA](#)

Celebrating America's Freedom Event Saturday, September 8, 2018, 10:00 a.m. Gettysburg National Military Park 1195 Baltimore Pike, Gettysburg...

Start Date: Sep 08, 2018
End Date: Sep 08, 2018
Time: All Day
Cost: \$35.00



[Read More](#) [Register](#)

Online Registration Ends August 15, 2018



VFW Auxiliary

MALTA Website – Manage Members – Event Registration

Member Registration

Event Information 2018 National Convention - Kansas City, MO
\$25.00

Member ID

Member First Name

Member Last Name

Selected Members

Member ID	Member Name	Cost	Auxiliary	Delegate	Address	Actions
-----------	-------------	------	-----------	----------	---------	---------

Additional Items for Event

Addon	Price	Quantity	For Member	Actions
45+ Luncheon	\$0.00	<input type="text" value="Quantity"/>	<input type="text" value="Select"/>	<input type="button" value="Add to Order"/>



VFW Auxiliary

MALTA Website – Manage Department

Manage Department

1. [Edit Dues Amount](#)
2. [Bank Account](#)
3. [Officers / Installation Reports](#)
4. [Edit Department Addresses](#)
5. [Officer Contact Information](#)
6. [Treasurer Resources](#)
7. [Officer Resources](#)
8. [Bond Purchase for Department Entities](#)



VFW Auxiliary

MALTA Website – Manage Department – Edit Dues Amount

Configure Dues

Dues for Members at Large

Department Member At Large	\$10.00	Edit
National	\$10.00	
Total Dues for Department Member at Large	\$20.00	

Dues for Members of Auxiliaries in the Department

Department Dues for Members of Auxiliaries	\$5.00	Edit
National	\$5.00	
Total Dues Dependent on Local Dues	\$10.00	

[Configure Auxiliary Dues](#)



VFW Auxiliary

MALTA Website – Manage Department – Edit Dues Amount

Schedule Department Dues

Dues for Members at Large

Department Member At Large	\$	<input type="text" value="25.00"/>
National		\$10.00
Total Dues for Department Member at Large		\$35.00

Dues for Members of Auxiliaries in the Department

Department Dues for Members of Auxiliaries	\$	<input type="text" value="5.00"/>
National		\$5.00
Total Dues Dependent on Local Dues		\$10.00

Dues scheduled on

Start Date	<input type="text"/>
------------	----------------------

Save Cancel



VFW Auxiliary

MALTA Website – Manage Department – Edit Dues Amount

The screenshot shows the MALTA website's 'Configure Dues' page. A modal window titled 'Auxiliary Dues Configuration' is open, prompting the user to search for an auxiliary and set its dues amount. The modal contains the following text:

Auxiliary Number

Auxiliary

How much are the total dues collected from one (1) Continuous Annual Member?
E.g.: Each year our annual members write a check for dues in the amount of \$18.00.

\$

Red arrows point to the input field containing '20'.

The background page shows a navigation menu (Home, Department Treasurer, Configure Dues) and a table of dues configurations:

Dues for Members at Large	
Department Member At Large	
National	
Total Dues for Department Member at Large	

Dues for Members of Auxiliaries in the Department	
Department Dues for Members of Auxiliaries	\$ 5.00
National	\$5.00
Total Dues Dependent on Local Dues	\$10.00



VFW Auxiliary

MALTA Website – Manage Department – Bank Account

Department of [REDACTED] Payment Profile

Account Type	Name on Account	Account Number	Routing Number	Bank	EIN	Action
Checking	VFW AUXILIARY, DEPT. OF [REDACTED]	*****[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Edit





VFW Auxiliary

MALTA Website – Manage Department – Bank Account

Configure Payment Profile

Account Type Checking Saving

Your Name	1001
Your Address	State
Pay to the Order of	\$
Your Bank Name	Dollars
MEMO	
⑆122456789⑆0000987654321⑆1001	
9 Digit Routing Number	Account Number

Name on Account * VFW AUXILIARY, DEPT. OF [REDACTED]

Routing Number * [REDACTED] [REDACTED]

Account Number * [REDACTED]

EIN [REDACTED]

[Read ACH Agreement](#)



I have read the ACH Agreement and affirm that I have the right to modify this payment method on my Auxiliary's behalf.



VFW Auxiliary

MALTA Website – Manage Department – Officers / Installation Reports

Installation Report

Search by your Department or for entities with your Department.

Search By

Department

Department

Auxiliary

County Council

District



VFW Auxiliary

MALTA Website – Membership Mgmt – Officers / Installation Reports

Home | Officers | Department Treasurer | File Installation Report for Department Entities | Auxiliary Officers

Auxiliary Officers [REDACTED]

Former Officers | Current Officers | Future Officers ←

Officer Installation 20[REDACTED]-[REDACTED] Officers

NOTE: Changes to Officers must go through the Department Secretary or the National Office

Office	Member ID	Name	Term
President	[REDACTED]	[REDACTED]	July 01, [REDACTED] - June 30, [REDACTED]



VFW Auxiliary

MALTA Website – Manage Department – Edit Department Address

Update Department Entities Contact Information

Entity	Department
	<input type="checkbox"/> Use Officer Contact Information
Address Type	Home
Address 1 *	<input type="text"/>
Address 2	<input type="text"/>
City *	<input type="text"/>
State *	Select State
Zip *	<input type="text"/>
Country *	Select Country
Start Date	<input type="text"/>
End Date	<input type="text"/>
	<input type="button" value="Save Changes"/> <input type="button" value="Cancel"/>



VFW Auxiliary

MALTA Website – Manage Department – Officer Contact Info

Department of Officers

Officer Role	First Name	Last Name	Phone	Email	Address 1	Address 2	City	State	Zip
Soloist									
Assistant Treasurer									
Treasurer									
Patriotic Instructor									
Flag Bearer									
Color Bearer # 1									
Banner Bearer									
Musician									
Assistant Secretary									
President									
Senior Vice President									
Junior Vice President									
Chaplain									
Conductor/Conductress									
Guard									
Junior Past Dept. President									
Chief of Staff									
Historian									
Assistant Soloist									



VFW Auxiliary

MALTA Website – Manage Department – Treasurer Resources

Department Treasurer Resources

Home / Department Treasurer Resources

2019-2020 Treasurer Resources

[2019-2020 Treasurer's Guide \(Updated July 2019\)](#)

MALTA Training Documents

MALTA Training for Treasurers (all levels)

- [Auxiliary Treasurer MALTA Membership System Training](#) (video)
- [Auxiliary Treasurer MALTA Membership System Training](#) (PowerPoint)
- [Auxiliary Treasurer MALTA Membership System Training](#) (pdf)

MALTA Training for Members

- [Member MALTA Membership System Training](#) (video)
- [Member MALTA Membership System Training](#) (PowerPoint)
- [Member MALTA Membership System Training](#) (pdf)

Membership

- [VFW Auxiliary Membership/Member Transfer Application](#) – Revised January 2019 (Fillable)
- [Member Update/Change Form](#) – Revised August 2018 (Fillable)
- [2018-2019 Membership Summary Form](#) (Fillable pdf)
- [2018-2019 Membership Summary Form](#) (Excel)



VFW Auxiliary

MALTA Website – Manage Department – Officer Resources



VFW AUXILIARY
UNWAVERING SUPPORT FOR UNCOMMON HEROES®

[HOME](#) [JOIN US](#) [ABOUT US](#) [WHAT WE DO](#) [EVENTS](#) [SCHOLARSHIPS](#) [BLOG](#) [MEDIA](#) [CONTACT US](#) [MALTA MEMBER LOGIN](#)

Officer Tools

[Home](#) / [Officer Tools](#)

2020-2021 National Program Book (FINAL)





VFW Auxiliary

MALTA Website – Manage Department – Bond Purchase for Department Entities

A new feature that we have added this year to MALTA is the ability for the Department Treasurer to bond the Auxiliaries/Districts/County Councils within their Department.

1. Log into MALTA, under your Department Treasurer role
2. Under “Manage Department”, click on number 8 “Bond Purchase for Department Entities”



VFW Auxiliary

MALTA Website – Manage Department – Bond Purchase for Department Entities

[Home](#) [Profile](#) [Duties](#) [Resources](#) [Events](#) [Make Gift](#) [Reports](#)

Department Treasurer [Department Secretary](#)

Department of [REDACTED]

Shortcuts



[Process Dues](#)



[Reports](#)



[Receipts](#)



[Withdrawals
by National](#)



[Deposits by
National](#)



[Make a Gift](#)



[Print Bond](#)

Manage Members

- | | | |
|-----------------------------------|---|---|
| 1. View Members | 5. Convert to Life | 9. Order Membership Cards |
| 2. New Membership | 6. Transfer Members | 10. Print Member Cards |
| 3. Rejoin Member | 7. Address Labels | 11. Event Registration |
| 4. Process Dues | 8. Phone & Email List | |

Manage Department

- | | | |
|--|--|---------------------------------------|
| 1. Edit Dues Amount | 5. Officer Contact Information | 9. Voting Tally Sheet |
| 2. Bank Account | 6. Treasurer Resources | |
| 3. Officers / Installation Reports | 7. Officer Resources | |
| 4. Edit Department Addresses | 8. Bond Purchase for Department Entities | |

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VFW Auxiliary

MALTA Website – Manage Department – Bond Purchase for Department Entities

3. Select the entity you want to bond (only one at a time) and click enter.

Profile Duties Resources Events Make Gift Reports

Duties | Department Treasurer | Members

Bond Purchase - For Entities within the [redacted]

Select entity from dropdown list, then click Enter button to continue

NOTE: Only one entity bond purchase can be processed at a time.

District Only one entity bond purchase can be processed at a time.

Auxiliary [redacted]

County Council Only one entity bond purchase can be processed at a time.

Cancel Enter

4. This will look just like the page from when you bonded the Department. Check that agree and have been authorized and click “Purchase Bond”.

** The funds will be deducted from the Department checking account and it will be the responsibility of the Department to collect the fund from the entity.



VFW Auxiliary

Follow Up Meeting

We will conduct a follow up meeting. We want to give you a chance to get into MALTA and move around, process items and come up with any questions you may have. This meeting will be held on Thursday, August 20th, 2020 at 10 AM central time. You will receive an email when the time comes closer. Here are the details:

Follow up for new Department Treasurers
Thu, Aug 20, 2020 10:00 AM - 12:00 PM (Central Time)

Please join my meeting from your computer, tablet or smartphone.

<https://global.gotomeeting.com/join/525221709>

You can also dial in using your phone.

United States: [+1 \(646\) 749-3112](tel:+16467493112)

Access Code: 525-221-709

New to GoToMeeting? Get the app now and be ready when your first meeting starts:

<https://global.gotomeeting.com/install/525221709>

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QUESTIONS?

