

**SECRETARY / TREASURER  
JANUARY 30, 2025**



I am writing this Bulletin as so few of you were able to attend Mid-Winter Conference. As you know, at Mid-Winter we hold a training session and so I'd like to reiterate what we learned there to hopefully alleviate some of the questions and to reinforce some of our best practices.

At Mid-Winter there were only two (2) Treasurer's in attendance and there was only one District President and very few Auxiliary Presidents, but quite a few Secretaries attended. So ... please listen up as we covered the following:

- Malta usage and the need for all Secretaries and Treasurers to be proficient in it.
- Those not having a Secretary/Treasurer/Trustee Guide were given one to help decipher duties and responsibilities.
- Distributed was the revised Check Summary Form which reflects the **increase in Department Dues to \$6.00 on 1/1/25**. This increase has been properly communicated and has been done several times. But I continue to get dues of \$4.75. I would hope that you are not holding dues for a month (!!!) but if you someone who paid in December at the \$4.75 rate – these will be honored at this rate. However, if the correct amounts are not sent from here on out, they will be returned for correction. A revised form is attached.
- Available at this training was also the 8822-B (IRS form to change the person (Treasurer) of responsibility. We also had some W-9's on hand as well (used to give your correct taxpayer identification number (TIN) to National. I'm attaching these two forms for your use and/or file.
- We continue to see sloppy writing, cross-outs, just plain messy applications. Kindly remember these are a permanent record and, truthfully, I am spending far too much time trying to determine addresses, phone #'s, etc. Quite often missing is the very top data – i.e., Auxiliary No., City of the Aux., and State (WA). If this is a credit card application, National will not accept without this being filled in. I have been trying to catch these and fill in prior to scanning.

Of great concern is the time I am spending on applications wishing to use credit card(s). You must have a birthdate and a phone number or it cannot be booked (on any new member)! Moreover, it is imperative that the Affiliation portion be filled in completely and accurately. For instance, if the person the new member is coming in under is deceased and/or is a member of a different

Post, they are NOT Affiliated but Non-Affiliated, and all of that data must be affixed to the application – i.e. medals, years of service, location, etc. I have asked that Investigating Committees please use your Bylaws book when approving new members (reference Pgs. 5-11) as the medals are very clearly outlined here; hopefully making it a bit easier for you. Presidents, please try to put members on this Committee who know what to look for. I am always available should you need assistance here.

Credit Card data MUST be complete and accurate! If one declines, we can only re-submit if the number is transposed, wrong number used, etc. National is assessed a fee every single time a credit card is processed – whether it passes the test or not!! And, it is preferred they only be run once. We must do better here! And, if things do not improve, we may discontinue taking credit cards at all. I currently have about 10 that I am waiting for information on or revisions on or clarification of what was sent such as type of credit card being used and checked, number not clear or readable, outdated signatures/dates on the applications (date signed must not be older than 90 days old!). Enough said.

- A reminder that if you are converting an annual member to life, you may use the Change and Update Form – so much faster and easier. FYI, there is a box on that form for credit cards too.
- I strongly suggest you shore up your deceased and do not hold them until the end of the year ... input them now. And, if you have any questions, please call me!
- Many have not sent verification of your 990 filing and I only remind you because year-end reports require a copy be sent to the Dept. Treasurer.
- REMINDER of my new email address: [cmburkey52@gmail.com](mailto:cmburkey52@gmail.com)

I am going to end with this:

*It is hard –*

*to forget, to apologize, to save money, to be unselfish, to avoid mistakes, to keep out of the rut, to begin all over again, to make the best of things, to keep your temper at all times, to think first and act afterwards, to maintain a high standard, to keep on keeping on, to shoulder the blame, to be charitable, to admit error, to take advice, to forgive ... but it pays!!!*

Cindy Burkey

