Troop Finance Report Instructions

Troop leaders and troop treasurers will complete the Annual Troop Finance Report using the Troop Finance Report (fillable form) . This document will provide instructions on how to prepare for your Troop Finance Report. You can also check out the Troop Finance Report Overview module within the 636 Managing Troop Finances course in gsLearn for more information. If you have questions or need help completing your Troop Finance Report, please contact Member Services by emailing info@gsnorcal.org or call (800) 447-4475, ext. 0, M – F, 9am – 5pm.

PREPARATION:

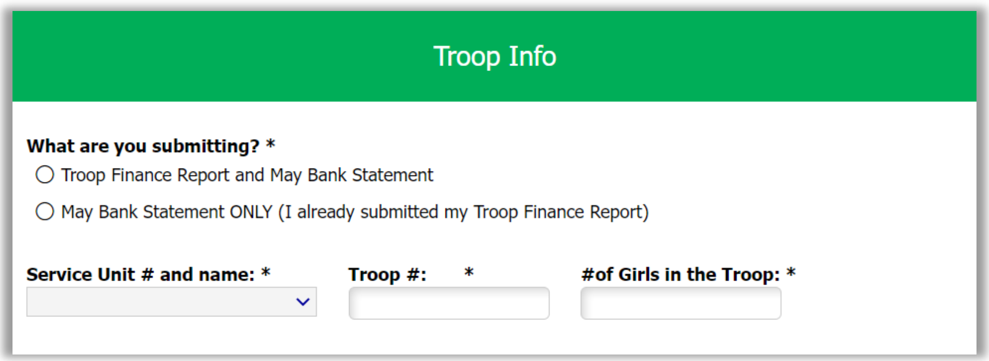
Make sure you have completed the following steps, before you enter troop financial information into the Troop Finance Report:

- To support we have available to download the Troop Finance Report Tracking Workbook
- Gather all income and expense documentation and receipts.
- Download and save a PDF copy of your May bank statement when it becomes available.
- Enter all your income and expense categories into the Troop Finance Report Tracking Workbook for easy entry into the Troop Finance Report.

Please note that you'll be required to submit the following documents:

- May bank statement

To begin, select Troop Finance Report and May Bank Statement.


Troop Info

What are you submitting? *

○ Troop Finance Report and May Bank Statement

○ May Bank Statement ONLY (I already submitted my Troop Finance Report)

Service Unit # and name: * | Troop #: * | #of Girls in the Troop: *

Who can enter the troop's annual income and expenses directly on the Troop Finance Report?

- Only active GSNorCal troop leaders and troop treasurers, with a current membership and an approved background check on file with GSNorCal.
- How you and your troop treasurer choose to organize and track the troop finances throughout the year is up to you. We recommend the troop treasurer and troop leader have discussions in March-May to review and reconcile all income and expense receipts, outstanding checks, payments, and cash on hand with the troop's May bank statement. Use the Troop Finance Report Tracking Workbook to help manage and balance your income and expense categories and financial summary for easy transfer to the Troop Finance Report.
- Share the end of year financials with any additional bank account signers. Once all signers agree, the troop leader and/or troop treasurer can enter the final troop financials into the Troop Finance Report.