**AUDIT INSTRUCTIONS – Institute Recording Secretary**

**Please Read Carefully**

Please arrange with the desk officers of your Institute to send the following materials via UPS or some other service that has a tracking device in case the books are lost. All of the listed items are necessary for the committee to complete the audit and should be sent at the same time. **Insure the box for Seventy-Five Dollars ($75.00)** Please include all of the listed items.

FROM THROUGH

**RECORDING SECRETARY** Minute Book\* and Roll Call record

Membership Record in Alphabetical order, giving

name, address, roll number and kind of membership

Quarterly Reports for the requested period

Grand Directors’ Letters accepting Quarterly Reports

Duplicate Deposit Slips

By-Laws

Roll Book(s)

Warrant Slips for the requested period

Date of last Audit

Copies of 990N and 199N verification forms

**FINANCIAL SECRETARY** Financial Secretary’s Day Book

All Ledger Sheets (including resigned, suspended and deceased members during this period and filed sheets

**FINANCIAL SECRETARY** Treasurer’s Book\* record

Commercial Checking Account book/stubs

Savings Account bank book(s) or statements

Bank statements and cancelled checks

Warrant Slips for the requested period

\*These items can be sent minus the covers. Please place the loose sheets between two pieces of cardboard and tie securely or place the loose sheets in a manila envelope before packing.

To avoid unnecessary delays, please check off the requested items and make sure that all items are included in the package. With the permission of the Grand President, the cost of telephone calls made to request materials that were originally requested but not sent, will be charged to the Institute.

The committee hopes to have your books returned to you as soon as possible. If all requested items are sent, you will be helping in this important work.

**SEND BOOKS TO**

Audit Committee Captain Address

Phone # E-mail