

Parish Financial Services Newsletter

Volume 8, Issue 4

May 2011

Special points of interest:

- Open enrollment is currently underway. Please remind all employees to return the forms by June 1st!
- Stock donations are on the rise! Don't forget to remind your parishioners that donating stock is an excellent way to support the Parish and Archdiocese!

Inside this issue:

Parish Stewardship	2
Insurance Billings	2
Employee Benefit Open Enrollment 2011	2
Safe Environment Update	3
Stock Donations	3
Stock Donation Information Form	4

Parish Annual Report 2010 - 2011

It's hard to believe by looking outside, but it really is that time of year again! The 2010-2011 Parish Annual Report is now available online for those of you who wish to get a head start. A couple reminders for this year:

- We will not be mailing packets out this year. The PAR is available online only and can be found by following this link: <http://www.seattlearchdiocese.org/Archives/PAR.aspx>
- On the website there are 2 available versions of the report for download. The "Electronic Forms" are designed to be completed electronically in Microsoft Word and Excel. The "Paper Forms" are designed to be printed and completed in ink (This method is not recommended but is still available!) Please be sure to download and save the forms for the method you intend to use.
- When you click on "view" for each section, be sure to select "Save" when the dialogue box appears. Save each file to a folder on your desktop or in "My Documents" where you can easily retrieve them. If you select "open" and then forget to "save as" you will lose your work!
- The Parish Annual Report must be postmarked no later than **Friday AUGUST 12, 2011!** We recommend handing out the sections of the report to all those responsible for completing it right away. We understand that many people take time off during the summer however it is essential that we receive the reports no later than August 15th.



If you have any questions about the format of the report or have any trouble downloading the forms, please contact Manny Keller-Scholz at (206) 382-4873 or manny.keller-scholz@seattlearch.org.

Notes from the PRF

If you have made your regular scheduled monthly payment on your PRF loan and are sending in an additional payment, please indicate clearly that you want it applied to principal only. All payments received without such notation will be applied to the accrued interest first as of the date of receipt of such payment, with the remainder to principal. This is stated in your loan agreements.

We will be emailing you preliminary PRF statements before June 30th to give you a head start for the fiscal year-end processing. Please take time to review these statements for accuracy and notify Joan or Loretta immediately if you need any adjustments to be made. Any request received after noon on June 29th will be booked in the next fiscal year. Joan's email is joanb@seattlearch.org. Loretta's email is lorettag@seattlearch.org.



Parish Stewardship

Do You Have What You Need?

For a Successful Stewardship of Talent Campaign?

Is your parish conducting a Commitment Renewal for the Stewardship of Talent?
Do you have the resources you need?

- Stewardship of Talent printed materials
- Campaign timeline with instructions
- Parishioner letter templates tailored for your parish software

Contact the Parish Stewardship Office Today To Get Everything You Need for a Successful Campaign!

(206) 903-4619 - (866) 381-2033 - ParishStewardship@Seattlearch.org

“If you pay in full by the end of July (must be postmarked by July 25th), you receive a 5% discount!”

Annual Insurance Billings

2011-2012 Property & Liability and Auto Insurance Billing will be mailed out in June! Just a friendly reminder, if you pay in full by the end of July (must be postmarked by July 25th), you receive a 5% discount. This amount is calculated on your invoice. If you pay in full by the end of August (must be postmarked by August 25th), you receive a 2% discount. These discounts apply only if all prior year insurance charges have been paid in full. Beginning October 1, finance charges at the rate of 1% per month on the unpaid balance will be charged. To avoid a finance charge for the following month, your payment **MUST** be post-marked by the 28th of the month. Payments received will be applied to unpaid finance charges first, then to the insurance premium balance.

Employee Benefit Open Enrollment 2011

The open enrollment period is currently underway! Open Enrollment is May 1, 2011 – June 1, 2011. Employees who are not making enrollment changes don't need to complete a new form. If you have employees who are making changes, all forms must be postmarked no later than June 1 or hand delivered to Benefits Services by 4:00 p.m. on June 1. Late forms will not be accepted. To access information about Open Enrollment please visit:

http://www.seattlearchbenefits.org/lay_employees/Lay_Sites/openenrollment2009.aspx

If you have any questions, you can contact the Benefits Services Office at (206) 382-4566 or e-mail benefitsservices@seattlearch.org.



Safe Environment Reminder

REMINDER!!!

**ONE WEEK UNTIL SAFE ENVIRONMENT DEADLINE!!
PLEASE MAKE SURE ALL REQUIRED TRAINING AND VERIFICATION IS
COMPLETED BY
MAY 31, 2011!!**



VERIFICATION PROCESS FOR PARISHES AND SCHOOLS

Each parish and school must submit the "VERIFICATION OF SAFE ENVIRONMENT COMPLIANCE" form by May 31st. **The forms must be signed by the assigned pastoral leader (pastor, priest administrator or pastoral coordinator) or principal at each parish/school and the signed original must be returned to the Safe Environment office by May 31, 2011.** Incomplete forms will not be accepted.



This form verifies the parish has met all Safe Environment requirements for 2010-2011. This includes that all employees and any volunteer with ongoing unsupervised access to minors or vulnerable adults have:

- A cleared **Criminal Background Check** within the last three years
- Signed-off on **Safe Environment Abuse Prevention Policies**
- Completed required annual **Safe Environment Training**

In addition:

- All parishes/schools must have offered "Called to Protect for Parents & Families" to their community.
(Please remember the class does not need to be hosted on-site but the parish/school may advertise the class at another location nearby)

Schools must also verify they have completed the required Safe Environment curriculum with their students and report their attendance numbers in SETA Net.

If you have any questions or would like to request a new form, please call the Safe Environment Office at (206) 274-3188, sep@seattlearch.org



Stock Donations



The Annual Catholic Appeal is in full swing and we're seeing a high volume of donors interested in donating stock! Stock donations to parishes have also been on the rise. For your convenience, we've attached the most recent version of the Stock Donation Information Form which is also available on our website:

<http://www.seattlearchdiocese.org/Archdiocese/PFS/Forms.aspx>

Please direct all stock inquiries to Emily Lee at (206) 382-7316 or emily.lee@seattlearch.org.

Thanks!



DID: _____ (Office Only)

ARCHDIOCESE OF SEATTLE

PID: _____ (Office Only)

STOCK DONATION FORM

INSTRUCTIONS FOR MAKING A DONATION:

- 1) Contact Emily Lee at Parish Financial Services at (206) 382-7316
- 2) ***Contact your Broker to inform them of your request. They will be able to help direct you on the paper work that you need to present them to release your stock.***
- 3) Complete the information below, then either email, mail, or fax this form to your parish and Parish Financial Services, "Attn: Emily Lee" at (206) 382-4279.

Donor's Name: _____		Phone: _____	Fax: _____
Address: _____		City: _____	State: _____ Zip: _____
Donating # of Shares: _____	Company Name: _____	Approx. Value (if known) : _____	
For: _____ Parish _____ School _____ City: _____			
For the Benefit of (Please provide either number of shares, or dollar amount in the spaces provided):			
Stewardship (Weekly Collections): _____		Capital Campaign (Building Fund): _____	
Annual Catholic Appeal: _____		Crozier Society: _____	
		Fulcrum Foundation: _____	
Catholic Community Services: _____		Planned Giving Annuity for: _____	
Other:(Org name): _____		(Amount): _____	
Other:(Org name): _____		(Amount): _____	

Please Note: Mutual Fund donations experience longer processing times. Please keep this in mind when donating at the end of the Calendar year.

Donor's Broker Firm: _____

Account Executive: _____ Phone: _____

(If you do not have an account executive, only the firm information is needed)

INFORMATION TO GIVE DONOR'S BROKER ON OUR ACCOUNTS:

*** TAX ID#: 91-0778147**

D.A. Davidson: Acct title: Corporation of the Catholic Archbishop of Seattle.

Acct Number: 11402604 **DTC:** 0361 **Acct Exec:** Miles Otoupal (425) 881-6665

(*Please use for all Mutual Fund Donations that can be transferred to an outside firm)**

OR

Bank of America: Acct title: n/o Corp Cath Arch of Seattle-Sub

Acct Number: a/c 16-100-1213370 **DTC:** 0955 **Acct Exec:** Heidi Gordon (206) 358-3380

Thank you for completing this form. Please Mail or Fax to:

Emily Lee

Parish Financial Services

Archdiocese of Seattle

710 9th Ave, Seattle, WA 98104-2017

Fax: (206) 382-4279

*For more information on stock donations please contact (206) 382-7316 or email: emily.lee@seattlearch.org