

# Clerk Duties

## Year-End

- Fin Annual church materials orders (by September 15th)
- Fin (November) Start Budget Process for next year
- Fin Tithing Settlement (begins in November, interviews held in December)
- Fin (December 1) Negotiate with Stake regarding Missionary account balancing
- Fin Ensure Clerk and Bishopric do the financial training for the Audit
- Fin 6 month Audit (held around Jan or Feb)
- Fin File financial records after your audit (Dispose past 7th year)

## Half-Year Mark

- Fin Review Budget, Publish Budget to Auxiliaries
- Fin Ensure Clerk and Bishopric do the financial training for the Audit
- Fin 6 month Audit (held around July or August)
- Mem Membership Audit (due June 30)

## Quarterly

- Fin Pursue Outstanding Cheques past 60 days
- Stat QUARTERLY REPORT (last weekend of each quarter - Mar, Jun, Sep, Dec)
- Stat Rescue Initiative data (last weekend of each quarter - Mar, Jun, Sep, Dec)
- Stat Bishop action and interview list (give to Executive Secretary)
- Stat Attendance rolls (for Sacrament and for each organization)

## Monthly

- Fin Review the Month-end Financial statement with Bishop (Sign and file)
- Mem Update the Area Book (form for each New & Returning Member)
- Mem Update the YSA Book (form for each YSA)

## Weekly

- Fin Enter Donations and Expenses
- Mem Sacrament Meeting attendance
- Mem Update callings (Notify Stake of new Presidents)
- Mem Rescue Lost members (9 step process) - bring names to Huddles/Unit Council (Step 7-9 involves Missionaries, PH and Aux leaders)

## Infrequently

- Mem Record ORDINANCES and CHILD BLESSINGS
- Mem Request or send membership records
- Mem Remove deceased members

## Other

- Mem Maintain and distribute a NO CONTACT list
- Hist Keep a Unit history

## Resources

Clerk Training at

<http://saskatoonstake.org/portal/clerks/index.html>

and [clerk.saskatoonstake.org](http://clerk.saskatoonstake.org)

Clerk help line 1-800-537-5932 or [mlsupport@ldschurch.org](mailto:mlsupport@ldschurch.org)

LDS Catalog (Materials) at <https://store.lds.org>

Stake Clerk - Kim Carlson at 281-0815 or [saskatoonstakeclerk@yahoo.com](mailto:saskatoonstakeclerk@yahoo.com)

Finance Clerk - Chris Layes at 306-361-4249 or [saskatoonstakefinance@outlook.com](mailto:saskatoonstakefinance@outlook.com)