

Administrative Rules,

Montana Society of Public Accountants

Compiled on June 2, 1998 by Becky Spencer from past motions of the Board (BD) of the General Membership (GM).

Seminars:

Fees for members shall be reduced by 80% of annual dues.
(11/11/89BD)

Employees of members (who are not themselves members) shall pay \$15 more than members attending seminars.
(10/30/1995BD)

No charges at door for Gear Up (walk ins payment must be made). Refund requests must be two weeks prior to seminar or a \$25 cancellation fee will be billed. Substitutions allowed. (09-16-98BD)

* Gear Up proceeds must be used for continuing education or scholarship to avoid unrelated business income consequences.
(09/18/91GM)

Eight hours of A&A at state convention to remain in place.
(10/27/97BD)

No spring continuing education seminar. (09/22/93BD)

Board of Directors:

Expenses for Board of Directors and committee heads to be paid for one meeting per year. (09/18/91GM)

Discretion of Board how to disburse convention funds. (?GM)

At least two meetings, one in May and on following annual meeting. (Recommendation by National)

Executive Secretary:

General Duties:

Publish a newsletter. (09/17/91BD)

Publish a membership directory. (09/13/89GM)

Compile and publish board meeting and General Membership Minutes. General Membership in Newsletter and Board Meeting by mail to Board Members. (09/16/98GM)

Pre approve from board all checks over \$2500 aside from regular annual expense (ie Gear Up). (Spring 94BD)

Provide detailed deposits, expenses, budget report and a general ledger to the Treasurer on a semi-annual basis by December 15 for the November closing and by June 15 for the May closing. (10/13/95BD)

Gear Up or Continuing Ed:

Do mailings for seminars. (09/16/98D)

Not send fliers to the lawyers for CLE. (09/22/93BD)

Announce Continuing Ed in major Montana newspapers (09/16/90BD)

Send postcard confirmations to Gear Up enrollees. (09/19/90BD)

Thank you cards and membership applications to attendees. (09/19/90BD)

Get plaque for President (09/17/91BD)

Send a certified letter for any NSF checks demanding payment in 30 days. (09/13/89GM)

Treasurer:

Take over in an interim capacity should the Executive Secretary be unable to fulfill their administrative duties. (09/16/98BD)

President:

Recommended to attend District 9 meeting or send representative. (06/04/98)

Keep copies of minutes, bylaws, administrative rules, and other data deemed pertinent to be passed to the next president. (09/16/98BD)

Miscellaneous:

70% of our membership must be of NSA to get financial aid (ie lobby and legal aid).
(NSA)

At least on officer or board member must attend legislative strategy conference to receive funds. (NSA)

Leadership conference highly recommended by National. (08/28/92BD)

\$5 chit to anyone brings in a new member. (10/30/95BD)

Membership fees: \$75/Active \$50/Social

*\$2500 scholarship to msu B jr. accounting student (9.21.01 BD)
must be a MT resident (9.21.01 GM)*