

(date)

From: Division Captain, Div  
To:

Subj: Appointment as Division Finance Staff Officer

1. In accordance with the applicable provisions of the U. S. Coast Guard Auxiliary Manual, COMDTINST M16790.1 (Series), I hereby appoint you as the Division Finance Staff Officer for the calendar year 200\_\_.

2. Your duties and responsibilities, consistent with the provisions of the Auxiliary Manual, are as follows:

a. Exercise staff responsibility and supervision over all Division financial matters, and keep the Division Board informed of all developments in this area.

b. Unless otherwise directed, you are to schedule qualified Auxiliarists to perform specific activities in your area of responsibility. The schedule must include a specific time and place for the activity.

c. Maintain close liaison with the District and Flotilla Finance Staff Officers.

d. Keep complete and understandable records of all receipts, disbursements, and other financial transactions.

e. Serve as a member of the Division Budget Committee and prepare an annual budget for consideration by the committee and for approval by the Division Board.

f. Render financial reports at Division meetings and as otherwise required. Encourage prompt payment of obligations.

g. Prepare the Annual Financial Report for review by the Division Audit Committee and submission to the Director.

h. Under my supervision, you shall receive and pay out all monies of the Division in accordance with its Standing Rules.

i. Immediate supervisory responsibility for routine matters is vested in the VCP. Cooperate with the VCP in every way to ensure that the Division's finances are effectively administered.

j. Upon expiration of your term of office, or when so directed by me, transfer all property and records of the office to your successor.

k. Additional duties of your office include, but are not limited to, the attached.

3. I am pleased to have you as a member of my staff.

## SUGGESTED ADDITIONAL DIVISION FINANCE STAFF OFFICER DUTIES

Attend all meetings of the Division. Give the Vice Captain prior notice when such attendance is not possible.

Whenever possible, attend District Board Meetings held in your area.

Be prepared to assist the Flotillas with any workshops, seminars and training sessions called, particularly those for the training of elected and staff officers.

Be familiar with the Division Standing Rules and the contents of the various other Auxiliary publications that pertain to handling and accounting for Auxiliary finances.

Take positive steps to ensure that the FSOs-FN are well trained. Conduct whatever workshops and/or training program(s) may be necessary to ensure that District policy is followed in your program.

Initiate and maintain contact with the DSO-FN.

Be alert for any reports on problems with supplies from the National Supply Center that affect your area of responsibility. Bring these matters to the attention of the VCP and/or DCP.

As a Division Staff Officer, you are a direct representative of the Division Captain, and as such, you are directed to visit and communicate with the various Flotillas as may be required to assist them. As a courtesy, prior coordination of any visits to the units will be made with the applicable FCs.

Prepare regular mailings to the Flotilla Finance Staff Officers. The frequency of such mailing is to be that required to pass down all information received from the DSO-FN. A mailing should also be sent as an introduction prior to the start of the year, with any directions, procedures and reminders that may be necessary to start new FSOs-FN off in the right direction. The purpose of these mailings is to ensure that communication down to the Flotilla level is maintained. When appropriate, copies will be provided to the Division Board and applicable District Staff Officers.

Prepare an article for the Division publication, when appropriate, to pass information of a general nature or of widespread interest down to Flotilla members within the Division.

Promptly mail out statements as specified in the Division's Standing Rules. You are responsible for the collection of all dues from the Flotillas.

Ensure prompt payment of District dues and/or any other financial obligations as authorized by the approved Division Budget, by the Division Captain as permitted by the Standing Rules, or by approval voted by the Division Board.

Prepare an Order Form, with Division price lists, for use by the Flotillas in ordering Public Education Course materials.

At each meeting, report in writing to the Division Board on activities and progress in carrying out these duties.

Provide a complete financial statement for review by the Division Board as required by the DCP.

Provide data required for the annual Audit Committee report to the Division Board and Director.

Copies of all correspondence from you, when appropriate, are to be provided to the DCP, VCP and the applicable DSO(s) (for matters concerning their particular areas).