

BRINGING CATHOLIC VALUES TO LIFE CATHOLIC ORDER OF FORESTERS A CATHOLIC FRATERNAL BENEFIT LIFE INSURANCE SOCIETY SINCE 1883 355 Shuman Boulevard, Naperville, IL 60563-1270 catholicforester.org | 800-552-0145

Here's how the Local Court Reimbursement Program works:

GUIDELINES

- Every year on January 1, the High Court determines the court's annual maximum yearly fraternal activity budget.
- The amount of each court's budget is based on the previous year's December 31 membership count.
- The amount is computed at \$3 per adult and youth member.
- The High Court reimburses each local court for approved fraternal activity expenses after receiving a Local Court Expense Request (FA-260).
- Approved expenses are reimbursed until the court exhausts its yearly budget.
- Court membership count is reviewed mid-year. If membership increases, the budget increases accordingly; however, a mid-year decrease will not affect that year's budget.
- Mileage is not eligible for reimbursement.
- Cash or gift card reimbursements are not allowed.

REIMBURSEMENT PROCEDURE

- Complete Local Court Expense Request (FA-260).
- Attach receipts if expenditures exceed \$25 per activity.
- Submit the request with receipts within 60 days of the activity, but no later than April 1 of the following year.
- Approved reimbursements are directly deposited into the court bank account.

REIMBURSEMENT REQUIREMENTS

Reimbursement eligibility remains contingent on court compliance with the Rule of 5:

- 1. Audit Report/Bank Signatory Card
- 2. Bond Application
- 3. Officer List
- 4. Form 990-N Certification
- 5. Activities Documentation Report

EXCEPTIONS

Money raised or awarded through separately funded activities/events such as youth activities and tournaments are not counted against the budget.

The Local Court Reimbursement Program will not pay any money toward Matching Funds expenses.

All expenses are paid at the Home Office's discretion.



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LOCAL COURT REIMBURSEMENT PROGRAM

FREQUENTLY ASKED QUESTIONS

Q: When will we be notified of our court's yearly budget?

A: In early January, because the budget is based on the previous year's December 31 membership count.

Q: Does this mean more paperwork for officers?

A: No, a Local Court Expense Request (FA-260) is quick and easy to complete. It's designed for officers to keep one copy on file.

Q: When should we submit fraternal expenses?

A: Within 60 days of the activity, but no later than April 1 of the following year.

Q: Are court charitable donations reimbursable?

- A: 25% of the annual budget may be donated. Masses for deceased members or a small stipend presented to a priest for saying a special court Mass will normally be allowed.
- Q: Can we submit expenses for more than one activity on a Local Court Expense Request form?
- A: Yes.
- Q: We recently bought refreshments for a court meeting and only spent \$20. Do we have to include the receipts with the reimbursement form?
- A: Although receipts are not required for an activity expense totaling less than \$25, it's strongly recommended to include them anyway.

Q: Where can I get the reimbursement forms?

A: Log in to your account at <u>catholicforester.org</u>.

Q: What if we spend more than our allotted yearly budget?

A: Any expenses exceeding the yearly budget must be covered by the court treasury.

Q: Can a court carry over money not spent from one year to the next?

A: No, courts will be assigned a new budget each January. Amounts not spent the previous year will not be carried over.

Q: Can reimbursements be made for cash or a gift card?

A: No, this is not allowed.

Q: Can reimbursements be made for mileage?

A: No, this is not allowed.

Q: How can our local court receive Matching Funds reimbursement?

A: Document all Matching Funds expenditures using the Matching Funds Program forms. Submit to the Home Office for approval.

If you have questions, contact Judy James at jjames@catholicforester.org.