

Financial Statement Coversheet for an Incorporated Society

Name of Society

Society Number

Use this form to file the annual financial statement for your society. An officer of the society must certify that the financial statement has been submitted to, and approved by, the members of the society at a general meeting.

Failure to file the annual financial statement may indicate that the society is no longer operating and the Registrar may then take steps to remove it from the register.

I certify that the annual financial statement has been submitted to and approved by the members at a general meeting held on the _____ day of _____ (month) 20 _____.

Annual financial statement for (financial year) _____ Position held _____

Name _____

Signed _____

The society's annual general meeting is usually held in _____ (month)

Checklist before filing:

Does the annual financial statement detail:

The income and expenditure for the relevant year?

The assets and liabilities of the society at the close of the financial year?

All mortgages and secured loans of any description, affecting any property of the society, as at the close of the financial year?

Is the financial statement clearly legible on A4 white paper?

Have the contact details for the society changed? If so, you should also file a Change of Contact Details form, available online at www.societies.govt.nz.

Minutes of AGM meetings are not required.

Important Note:

The annual financial statement does NOT need to be audited UNLESS the rules of the society require that an auditor be appointed to audit the financial statements.

Your Contact
Details

Name and Postal Address:

Other Details

Telephone:

Email:

Post To

Incorporated Societies Register
Companies Office
Private Bag 92061
Victoria Street West, Auckland 1142