



Report of the Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report (¶ 2549). Additional reports should be made as requested by the Charge Conference or Church Council or equivalent. Numbers in parentheses refer to paragraphs in the 2008 Book of Discipline.

Copies of this report should be filed with the recording secretary, pastor, district superintendent and the board of trustees.

_____ Church _____ Charge
 _____ District _____ Annual Conference

For the period beginning _____ and ending _____
DATE OF PRIOR CHARGE CONFERENCE DATE OF CURRENT CHARGE CONFERENCE

1. Organization for the present conference year was effective (date) _____, by electing the following officers (no less than three, and up to nine persons):

Name	Term Expires
President _____	_____
Vice President _____	_____
Secretary _____	_____
Treasurer _____	_____
Member _____	_____
Member _____	_____
Member _____	_____
Member _____	_____
Member _____	_____

2. Is the local church incorporated (¶2528.1)? Yes No

3. a. Name or names in which title to each piece of property is recorded, as shown by civil land records (¶¶2535, 2537):

Name(s)	Office	Book	Page
Church Buildings _____	_____	_____	_____
Church Buildings _____	_____	_____	_____
Parsonages _____	_____	_____	_____
Parsonages _____	_____	_____	_____
Other _____	_____	_____	_____
Other _____	_____	_____	_____

b. Who is the custodian of deeds and other legal papers? _____

c. Where are they kept? _____

4. Does each deed contain trust clause (¶2503)? Yes No

5. Do you have a long-term plan for the replacement of facilities and equipment as they deteriorate? Yes No

6.a. Insurance (§2532.2, 2549.7)

Item Insured/ Insurance	Replacement Value	Amount of Coverage	Type of Coverage	Company	Restricted By Coinsurance (Yes or No and amount)		Expires When
Church Buildings	\$	\$			Y <input type="checkbox"/>	<input type="checkbox"/> Amount::	
					N <input type="checkbox"/>		
Parsonages	\$	\$			Y <input type="checkbox"/>	Amount:	
					N <input type="checkbox"/>		
Church Furnishings and Equipment	\$	\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Parsonage Furnishings and Equipment	\$	\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Vehicle(s)	\$	\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
General Liability		\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Worker's Compensation					Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Directors and Officers/Errors and Omissions/Crime		\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Professional Liability Coverage (Including Sexual Misconduct)		\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		

b. Have the buildings been inspected for fire and other safety hazards within the past year? ___ Yes ___ No

c. Have you assessed the of replacement value within the last 5 years? ___ Yes ___ No

d. Who performed the assessment? _____

e. Does the church have a Safe Sanctuary Policy? ___ Yes ___ No

f. Is the amount of insurance adequate? ___ Yes ___ No

(to determine adequacy of coverage, please use the GCFA Insurance Worksheet found at www.gcfa.org/charge.html)

7. a. Has an annual accessibility audit for church properties been conducted (§ 2532.6)? ___ Yes ___ No

(attach as a report; an example audit form may be found at www.gcfa.org/charge.html)

b. If needed, have you developed an accessibility plan? ___ Yes ___ No (Attach plan)

8. Provide a detailed list of income-producing and permanent funds:

Item	Date Received	Amount	Where Invested	Income	How Income is Used for Ministry

(Attach as a supplement a statement “clarifying the manner in which these investments made a positive contribution toward the realization of the goals outlined in the Social Principles of the church and showing the investments are socially responsible...” § 2532.5 and § 2549.9)

Signed: _____, President of Trustees

Date: _____

Annual Report of the Board of Trustees, 2009-2012

Prepared and edited by the General Council on Finance and Administration and authorized as the official form for this purpose.