

Secretary-Treasurer LM-2 Requirements

The effective management of union funds is paramount. Secretary-Treasurers manage hundreds of thousands of dollars of the membership and Local's money. If you are the Secretary-Treasurer of a Local that has an income of \$250,000 or more, the rules for collecting, analyzing and filing your union's LM-2 Labor Department Annual Report are drastically more complex than ever before. Remember, the rules aren't just related to new information on the form itself; you must also file your LM-2 electronically. This five (5) day class is designed to provide you with the effective tools to accomplish this filing. The workshop material will provide you with an excellent understanding of all the new requirements and will lead to the successful completion of the LM-2 form for you Local.

Learn how to

- Understand and meet all the new **LM-2 Labor Department reporting requirements**
- Acquire the needed **electronic signatures**
- **File your LM-2 form electronically**
- Become proficient in the use of the **Quick Books** Accounting System
- Establish a **Standardized Chart of Accounts to accommodate the new LM-2** for your Local's income and expense items
- Establish a Local **payroll** and **credit card** Account using the new **LM-2 Labor Department reporting requirements**
- **Produce** and **design financial reports** you need; i.e., **monthly financial reports**
- Establish income and expense accounts to **track** and **budget** the costs of the Local

You will benefit by

- Receiving a **CD that contains a Standardized Chart of Accounts** that meets the needs of the new LM-2 Labor Department reporting requirements.
- Performing **hands-on** computer exercises
- Participating in **real-world** activities, like those you need to accomplish every day
- Having instructors that **fully understand the material and your needs**
- Receiving **3 college credit hours**

Course length and schedule

- **Five (5) days** of in-depth training with personal instruction if needed
- Class # **LBUS3501**

Who should attend?

- **Treasurers, Presidents**, and persons responsible for auditing the finances

How to sign up

- Visit us at www.nlc.edu to register.

Some comments from class participants:

Declan Murray was the best instructor I have ever had. The class taught me more than any other class I've had on the subject.

Secretary-Treasurer – IBEW Local 627

This should be a must class for any Union Financial Officer. Quick Books approach was great. Instructor was very patient and answered all questions in a logical manner.

Office Manager – Laborers Intl Union

Pleasant learning experience! Declan was well prepared & materials were very good, meet the need I came to obtain for the Local.

President – IBEW Local 627

Excellent Class! This was the most informative Secretary-Treasurers class I ever attended. The horror stories I have heard about the new reporting requirements doesn't scare me anymore!

Secretary-Treasurer-- APWU Chicago Area Local

Best! Secretary-Treasurers training I ever had! – Really a must class!

Secretary-Treasurer-- APWU 480-481 Detroit Area Local

Made a complex job simpler. Excellent Teacher – Relaxed Environment – individual attention – made normally boring material, interesting. Best program available for the new reporting requirements.

Secretary-Treasurer – United Food and Commercial Workers, Local 1445

Absolutely great! This course has instilled confidence in me to be able to do my job well. Declan did an outstanding job in developing and presenting this course.

Secretary-Treasurer – United Steel Workers, Local 307

Excellent Class! Will let everyone know how great it was!

Secretary-Treasurer -- APWU St Louis Area Local

Great material, great information, and an exceptional instructor!

Secretary-Treasurer – OPEIU, Local 29

One of the very best classes I have had for Presidents & Secretary-Treasurer!

President – OPEIU, Local 251

Class was exceptional – loaded with information. Instructor made class fun... great interaction with class participants.

Administrative Assistant – AFGE, Local 2302

Better than any Secretary-Treasurer class I have ever attended. Great job.

Financial Secretary-Treasurer – United Association of Plumbers and Pipe Fitters, Local 189

Fantastic!! President – APWU Wichita Area Local

Fantastic Class! Learned a lot! Declan explained the processes so well that I felt the class was easy. I was expecting to rack my brain – but it was painless. I would recommend this class to any Financial Officer in a heartbeat. Treasurer, Intl Theatrical Stage Employees