

# The Secretary-Treasurer's Total Solution

The effective management of union funds is paramount. Secretary-Treasurers manage hundreds of thousands of dollars of the Membership and Local's money. They have a responsibility to insure the prudent handling of funds and the compliance to all regulatory requirements dictated by the IRS and DOL. This five (5) day class is designed to provide the Secretary-Treasurer with the tools to effectively manage all aspects of their positions. The class is a hands-on computer course designed to assist the student in developing proficiency with Quick Books as it relates to the Union environment.

## Learn how to

- Determine and meet your Local's **fiduciary responsibilities**
- Accommodate all the **IRS and new Labor Department reporting** requirements
- Become proficient in the use of the **Quick Books Pro** Accounting System
- Establish a **Standardized Chart of Accounts (income and expense items)** for your Local
- Establish your Local's **payroll, credit card account, asset and liability accounts** for taxes, buildings, furniture and equipment
- **Produce and design financial reports** that will accommodate **monthly financial reporting** and will **track special projects or events**
- Use and establish income and expense accounts to **track and budget** the costs of the Local

## You will benefit by

- Receiving a **CD containing a Standardized Chart of Accounts** that is tailored to the Union environment and meets the reporting requirements of the Labor Department LM 3 & 4 Local. It's all you need to get started on making the job easier.
- 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 days** of in-depth training with personal instruction if needed
- Course # **LBUS3500**

## Who should attend?

- **Secretary-Treasurers, Presidents**, and persons responsible for auditing the Local's finances

## How to sign up:

- Visit us at [www.nlc.edu](http://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