

Chancery Finance Office - quick reference guide

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Financial and Tax Reporting

Chancery Office audited financial statements	x	x					
Diocese of Fall River financial transparency reports	x	x					
Diocesan investment accounts		x	x	x			
1099s issued by Chancery			x	x	x		

Deposit and Loan Program

Depository withdrawal requests	x	x					
New loan requests	x	x					
Current rates		x	x	x			
Online account access				x			
Account history, statements and current balances				x			

Chancery invoices

Monthly invoices (medical, dental, property, assessment, lay/clergy pension, etc...)			x	x	x		
Miscellaneous invoices (403B, etc...)			x	x	x		

Parish and School Support

Parish and school budgets						x	x
Parish annual report requirement						x	x
Parish assessment		x					x
Parish/school financial reviews and audits						x	x
Accounting questions						x	x
Escheated property searches						x	x
Diocesan schools scholarship endowment						x	x
Group purchasing opportunities (energy supply, phone, internet)		x				x	

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SOLAR opportunities		x				x	x
Proof of 510(c)3 status		x				x	x
Quickbooks questions						x	x
1099/tax reporting procedures for parishes and schools						x	x
Central staff support							
Expense reports (central staff only)			x	x	x		
Check requests (central staff only)			x	x	x		
Catholic Schools Office - banking/wires							x
W-9s for vendors				x	x		
Committee Support							
Diocesan Finance Council	x	x					
Diocesan Audit Committee	x	x					
Diocesan Investment Committee	x	x					
Diocesan Real Estate Committee	x	x					
Other							
Second collections			x	x	x		
Gifts of stock	Please call contact Christine Duggan at the Catholic Foundation Cduggan@catholicfoundationsema.org						
Sale or lease of properties	Please call contact Paul Brooks (Director of Facilities and Real Estate) at Pbrooks@dioc-fr.org						
Construction or renovation projects	Please call contact Paul Brooks (Director of Facilities and Real Estate) at Pbrooks@dioc-fr.org						