1375, boul. St. Laurent Blvd., Ottawa, ON K1G 0Z7

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cupemail@cupe.ca/courriel@scfp.ca - cupe.ca/scfp.ca

January 2019

## **IMPORTANT** PLEASE GIVE THIS PACKAGE TO THE TRUSTEES

## Dear Sisters and Brothers:

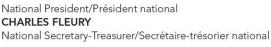
CUPE Trustees play a vital role in the union. Their annual audit ensures that the finances of the local union or chartered organization are being administered properly and effectively. Recommendations made by the Trustees help guide the membership in making the best financial decisions possible.

To that end, I am pleased to enclose the 2019 TRUSTEES' REPORT PACKAGE, to be used for all Trustees' audits in accordance with Article B.3.12 of the CUPE Constitution.

Please complete and return to my attention the following:

Trustees' Audit Report (using the paper version of the attached document <b>OR</b> generated from the electronic ledger)	completed, <b>signed</b> , and <u>balanced</u> with the amounts indicated on the Secretary-Treasurer's Financial Report to the Trustees
Secretary-Treasurer's Financial Report to the Trustees (using the paper version of the attached document <b>OR</b> generated from the electronic ledger)	completed by the local Secretary-Treasurer and given to the Trustees prior to the audit
Trustees' Checklist and Suggested Recommendations (attached)	completed by the Trustees
Trustees' written report to the membership	Reporting on findings of the audit (If none, please specify)
Trustees' written report made to the President and Secretary-Treasurer	Reporting on findings of the audit (If none, please specify)
Written response of the Secretary- Treasurer to the Trustees	Providing explanation to Trustees' findings

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MARK HANCOCK









We review all Trustees' Reports that are received at CUPE National. We will send your local a letter acknowledging receipt of your reports and confirm whether the reports have been accepted. A copy will also be sent to your CUPE National servicing representative, so they can assist you should there be any concerns with your submission.

We encourage locals to use the CUPE electronic ledger. There is a six-month ledger, as well as a twelve-month ledger that can be used for all other fiscal periods besides the January-December year. Download the ledger of your choice from the CUPE website at <a href="mailto:cupe.ca/ledger-local-union-financial-officers">cupe.ca/ledger-local-union-financial-officers</a>.

You may also wish to download the Financial Officers' Handbook which provides a wide range of financial information. The link can be found at <a href="mailto:cupe.ca/financial-officers-handbook">cupe.ca/financial-officers-handbook</a>.

If you have any questions or need additional assistance, please do not hesitate to contact us at 1-800-363-2873, option #5 or at <a href="mailto:trustees@cupe.ca">trustees@cupe.ca</a>. If you require extra copies of these documents, select option #6. You may also download them from the CUPE website at <a href="mailto:cupe.ca/trustees-report-package">cupe.ca/trustees-report-package</a>.

In solidarity,

CHARLES FLEURY

National Secretary-Treasurer

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**Enclosures** 

c.c.: M. Hancock; National Executive Board; National Trustees; Regional Directors; Assistant Regional Directors; Organizing and Regional Services; CUPE Servicing Representatives