

2023 CHAPTER REPORTING INSTRUCTIONS

ONLINE REPORTING IS STRONGLY ENCOURAGED

Online reporting is easy and efficient!

To get started, visit www.assuredlife.org. From the Homepage, click on **Chapter Leaders** on the top menu bar, then select **Chapter Annual Reporting**. The following reports *must* be completed no later than **May 1, 2024**:

- **Annual Report/Survey 2023**
- **Chapter Report of Officers for 2024**
- **Chapter Financial Report 2023**

HELPFUL TIPS:

- Prior to completing, glance through the reports to see what information is required and gather your resources before you begin.
- When the question asks for a number or average of a number, record only a *whole number*. For example, when entering average attendance, enter 25 rather than 20-25.
- Do not enter additional text or symbols in the numerical fields such as dollar signs and commas.
- If you're unsure of the answer, please estimate.
- Please answer each question unless otherwise indicated.

VERY IMPORTANT:

- As you enter information, use the **TAB** key to navigate to the next field. **DO NOT press the ENTER key until you are finished.** Pressing 'Enter' will submit what you've entered so far, and your data will be lost.
- When the report has been completely entered, hit Submit.
- To save a copy of your online submission, simply print the webpage before you click on Submit at the bottom of the page. If you forget, the home office can provide you a copy of your submission for your files.

*If you are unable to complete online reporting, forms may be downloaded and printed and submitted to:
Assured Life Association, 6025 S. Quebec Street, Ste. 320, Centennial, CO 80111
Please note that online submission is strongly encouraged.*

*If you experience website reporting difficulty, please call (800) 777-9777
or email assuredservice@assuredlife.org for assistance*

ADDITIONAL REPORTING INSTRUCTIONS

Chapter Annual Report/Survey

- There have been no changes to the annual reports for 2023.
- *For Fraternal Business & Social Activities or Events*, please report the number of business meetings separate from the number of social events/activities. If you combine business meetings with social events or programs, record the time spent and average attendance for the business meetings *separate from* the time spent and average attendance for the social event.
- *For Community Service Activities or Events*, a Yes or No answer is required for each question. If answering yes, please complete the description in the following field. If answering no, please enter N/A in the following field.
 - ⇒ For each of the major community service categories, other than donations, we ask that you report the amount the Chapter spent on putting on the event (*printing of promotional flyers, supplies for the service event, food and refreshments for volunteers, etc.*)
 - ⇒ Any amount donated to an organization in conjunction with an event should be reported on the Financial Report.

Chapter Financial Report

- In the Income section, there is an additional labeled *Member Donations to Charity through local chapter in support of Chapter Community Service Activity*. The purpose of this field is to record members' monetary donations for a community service project in lieu of in-kind donations or time volunteering. For example, if your Chapter has a member food drive and a member donates cash, this amount should be recorded as income in this field. This amount is also reported under Expenses of the Chapter for *Total Donations to Non-Profit Organizations* along with any Chapter Funds donated.

Chapter Reporting Deadline
May 1, 2024

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