

SMPS CHAPTER FINANCIAL REPORT

SMPS**Society for Marketing
Professional Services**

For the fiscal year September 1, 2010 – August 31, 2011

This completed report **MUST** be received by SMPS National no later than
September 30, 2011.

Preparer's Name _____

Chapter _____

	Budget	Actual	Difference
1. Total All Income (Itemize by source in Line 5)	\$	\$	\$
2. Total All Expenses	\$	\$	\$
3. Net Income (Loss) (Subtract item 2 from item 1)	\$	\$	\$

4. **EDUCATIONAL PROGRAMS** (Amounts here should also be included in Total Income and Expenses Reported above)

Income (Registration fees; Sponsorships, etc)

Expenses (Provide details below)*

Net Profit (Loss) from Programs

\$	\$	\$
\$	\$	\$
\$	\$	\$

**Educational Program Expense Breakdown*

Speaker Fees \$ Food & Beverage \$ Promotion/Adv/Other \$
Number of Programs 2010-11 Estimated Attendance: Largest Smallest Average

5. **SOURCES OF REVENUE** (Sum of all figures here should equal total "Actual" Income reported in Line 1)

Program Registrations	\$	Sponsors/Exhibitors	\$	Advertising	\$
Contributions/Donations	\$	Community Service Programs	\$	Interest Income	\$
Social/Fundraising Events	\$	Shared Dues	\$	Other Income	\$

6. **RESERVES as of 8/31/11** (Chapter's account balances)

Checking Savings Other Investments

7. **AUDITS:** Are your chapter's books and records audited annually? ☐ Yes ☐ No

If yes, who does the audit? Outside Auditor ☐ Chapter Committee ☐ Other ☐

ANNUAL IRS INFORMATION RETURN (File on or before January 15, 2012. Chapters with gross receipts less than \$200,000 and total assets less than \$500,000 at the end of the year may file Form 990EZ. Chapters with gross receipts normally \$50,000 or less may file a Form 990N (e-card). For details, please visit www.irs.gov/eo.)

Our chapter plans to file ☐ Form 990N ☐ Form 990EZ ☐ Form 990

A copy of your return must also be sent to SMPS National upon completion.

Please complete this form and return to SMPS.

MAIL**FAX****EMAIL****SMPS**

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