



SALES AND MARKETING
PROFESSIONALS
OF NORTHEAST
WISCONSIN

Finance Committee Activities

These functions are shared by the team

- Responsible for the administration of the registration process - ensuring the collection of the proper funds based on the membership or guest type. There are several membership types including Bundled, Pay-As-You-Go, Guests from a Member Company, Sponsorship, Recent College Graduate and Guests.
- Ensure PayPal linkage is operational and that all of the elements of the registration process are working properly.
- Maintain the membership database with program attendance data points.
- Periodic mail pick-up at the P.O. Box in Appleton including distribution of mail to other board or committee members.
- Manage checking, scholarship and savings accounts including deposits, withdrawals and distribution of funds for products and services rendered by the organization.
- Bring to the attention of the SMPNEW President any questionable expenses submitted by any member, or any questionable financial activity at all.
- Track and record all organization expenses.
- Identify and communicate members up for renewal, coordinate with the Membership Committee and generate invoices for renewal membership.
- Coordinate new member applications with the Membership Committee and generate invoices.
- Manage and communicate taxpayer ID information as requested.
- Annually review insurance policies and complete associated paperwork.
- Develop and communicate a monthly income statement for review at the board meeting. Report on the status of each financial account and note any special account activity.
- Support the VP if they are unable to attend monthly board meetings (usually one hour) and submit financial reports.
- Express your passion for sales, marketing and be prepared to share your experience and energy with the SMPNEW team!

