

SMPS CHAPTER FINANCIAL REPORT

For the fiscal year September 1, 2024 – August 31, 2025.

This completed report MUST be received by SMPS Headquarters no later than September 30, 2025.

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 2024-25 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	\$
Regional Conferences	\$	Community Service Programs	\$	Interest Income	\$
Social/Fundraising Events	\$	Shared Dues	\$	Other Income	\$

6. RESERVES as of 8/31/25 (Chapter's account balances)

Checking:	\$	Savings:	\$	Other Investments:	\$
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7. AUDITS: Are your chapter's books and records audited annually? ☐ Yes ☐ No

If yes, who does Outside Chapter Other

ANNUAL IRS INFORMATION RETURN ***

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

****Please attach a copy of your 990 for the year ended 8/31/24 to this form.**

8. ACCOUNTING SOFTWARE:

Does your chapter use accounting software for financial reporting? ☐ Yes ☐ No

If yes, what software (and version) are you using? _____

**Please complete this form and return to SMPS Headquarters,
Coordinator, Accounting and Operations, Christine Lucas at
accountspayable@sm^{ps}.org.**