

Financial Statement Coversheet for an Incorporated Society



The Incorporated Societies Act 1908 (Section 23)
This form is available online at www.societies.med.govt.nz

Name of
Society

Society
Number

Incorporated societies must file an annual financial statement with the Registrar of Incorporated Societies. An officer of the society must certify that the financial statement has been submitted to, and approved by, the members of the society at a general meeting. Use this form when filing an annual financial statement for an incorporated society.

I certify that the annual financial statement has been submitted to and approved by the members at a general meeting held on the _____ day of _____ (month) 20_____

Annual financial statement for (financial year) _____ Position held _____

Name _____

Signed _____

The society's annual general meeting is usually held in _____ (month)

Checklist before filing:

Does the annual financial statement detail:

The income and expenditure for the relevant year?

The assets and liabilities of the society at the close of the financial year?

All mortgages and secured loans of any description, affecting any property of the society, as at the close of the financial year?

A sample financial statement is available at www.societies.med.govt.nz.

Is the financial statement clearly legible on A4 white paper?

Have the contact details for the society changed? If so, you should also file a Change of Contact Details form, available online at www.societies.med.govt.nz.

Minutes of AGM meetings are not required.

Important Note: the annual financial statement does NOT need to be audited UNLESS the rules of the society require that an auditor be appointed to audit the financial statements.

Completed by

Name and postal address

Other details

Telephone

Email

Post to

Registrar of Incorporated Societies
Ministry of Economic Development
Private Bag 92061
Auckland Mail Centre 1020