

Resource List of Trained Diocesan Financial Reviewers

Please find an attached list of Trained Diocesan Financial Reviewers.

Please contact one of the above trained reviewers to check their availability to conduct your annual financial review. There are several reviewers to select from if one is unavailable. Please keep in mind the location of the reviewer in relation to your church. Select a reviewer as close to you as possible as some may have restrictions on ability to travel long distances.

Please read the Financial Review Prep List to see a detailed list of the documents you will need to have ready for the reviewer upon their arrival.

Please remember the Diocese is willing to pay for your financial reviewer to come out ahead of your scheduled financial review if you should need assistance in collecting or preparing the items on the prep list.

You will need a balance sheet available for your reviewer. If you don't have one and would like some assistance in creating one please take advantage of our offer to have a reviewer come out ahead of your review to assist you.

Your treasurer must be present during the financial review and all documents on the prep list must be available. If your reviewer arrives for your financial review and either of the above are not available you will have to reschedule the financial review and pay the reviewer twice for time and travel.