



# Report of Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report (§ 2549). Additional reports should be made as requested by the Charge Conference or Church Council or equivalent. Numbers in parentheses refer to paragraphs in the 2008 *Book of Discipline*.

**Copies of this report should be filed with the recording secretary, pastor, district superintendent, and the board of trustees.**

\_\_\_\_\_ **Church** \_\_\_\_\_ **Charge**  
\_\_\_\_\_ **District** \_\_\_\_\_ **Annual Conference**

**For the period beginning** \_\_\_\_\_ **and ending** \_\_\_\_\_  
DATE OF PRIOR CHARGE CONFERENCE DATE OF CURRENT CHARGE CONFERENCE

1. Organization for the present conference year was effected (*date*) \_\_\_\_\_,  
by electing the following officers (no less than three, and up to nine persons):

Name	Term Expires
President _____	_____
Vice President _____	_____
Secretary _____	_____
Treasurer _____	_____
Member _____	_____
Member _____	_____
Member _____	_____
Member _____	_____
Member _____	_____

2. Is the local church incorporated (§2528.1)? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No**

3. a. Name or names in which title to each piece of property is recorded, as shown by civil land records (§§2535, 2537):

Name(s)	Office	Book	Page
Church Buildings _____	_____	_____	_____
Church Buildings _____	_____	_____	_____
Parsonages _____	_____	_____	_____
Parsonages _____	_____	_____	_____
Other _____	_____	_____	_____
Other _____	_____	_____	_____

b. Who is the custodian of deeds and other legal papers? \_\_\_\_\_

c. Where are they kept? \_\_\_\_\_

4. Does each deed contain trust clause (§2503)? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No**

5. Do you have a long-term plan for the replacement of facilities and equipment as they deteriorate? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No**

ANNUAL REPORT OF TRUSTEES CONTINUED

6. a. Insurance: (§§ 2532.2, 2549.7)

Item Insured/ Insurance	Replacement Value	Amount of Coverage	Type of Coverage	Company	Restricted by Coinsurance (Yes or No and amount)		Expires When
					Y <input type="checkbox"/>	Amount:	
Church Buildings	\$	\$			Y <input type="checkbox"/>	Amount:	
Parsonages	\$	\$			N <input type="checkbox"/>	Amount:	
Church Furnishings and Equipment	\$	\$			Y <input type="checkbox"/>	Amount:	
Parsonage Furnishings and Equipment	\$	\$			N <input type="checkbox"/>	Amount:	
Vehicle(s)	\$	\$			Y <input type="checkbox"/>	Amount:	
General Liability		\$			N <input type="checkbox"/>	Amount:	
Worker's Compensation					Y <input type="checkbox"/>	Amount:	
Directors and Officers/ Errors and Omissions/Crime		\$			N <input type="checkbox"/>	Amount:	
Professional Liability Coverage (Including Sexual Misconduct)		\$			Y <input type="checkbox"/>	Amount:	

b. Have the buildings been inspected for fire and other safety hazards within the past year? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No**

c. Have you assessed the replacement value within the last 5 years? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No**

d. Who performed the assessment? \_\_\_\_\_

e. Does the church have a Safe Sanctuary policy? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No**

f. Is the amount of insurance adequate? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No** (to determine the adequacy of coverage, please use the **GCFA Insurance Worksheet found at [www.gcfa.org/insuranceworksheet.pdf](http://www.gcfa.org/insuranceworksheet.pdf)**)

7. a. Has an annual accessibility audit for church properties been conducted (§ 2532.6)? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No**

(Attach report; audit forms may be found at [www.gcfa.org/accessibilityaudit.pdf](http://www.gcfa.org/accessibilityaudit.pdf))

b. If needed, have you developed an accessibility plan? \_\_\_\_\_ **Yes** \_\_\_\_\_ **No** (Attach plan.)

8. Provide a list of income-producing and permanent funds:

Item	Date Received	Amount	Where Invested	Income	How Income is Used for Ministry
		\$		\$	
		\$		\$	
		\$		\$	

(Attach as a supplement a statement “clarifying the manner in which these investments made a positive contribution toward the realization of the goals outlined in the Social Principles of the church and showing the investments are socially responsible...” § 2532.5 and § 2549.9)

Signed: \_\_\_\_\_, President of Trustees

Date: \_\_\_\_\_

**Annual Report of the Board of Trustees, 2009-2012**

Prepared and edited by the General Council on Finance and Administration and authorized as the official form for this purpose.

Permission is granted to photocopy this form for use in your local church.