ΑΣΦ
ALPHA SIGMA PHI
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VP OF FINANCE – FIRST 30 DAYS

Congratulations on your election as Vice President of Finance! Although this may not be an exhaustive list, this is intended to get you started on tasks that will be beneficial to you moving forward.

Stakeholders

- Reach out to your Finance Advisor
    - Set up a time to meet within the next two weeks
    - Get to know one another and establish expectations for working together
    - Analyze account balances, budget, paperwork, and cash flow
    - Discuss challenges or issues you may experience during your term
    - Set up a day and time for biweekly communication
- Contact the IFC Treasurer and introduce yourself
- Reach out to your Fraternity Staff Liaison
    - Get to know one another and establish expectations for working together
- Review any outstanding balances and upcoming deadlines
- Contact your Chapter Services Representative at OmegaFi to discuss the chapter's relationship and introduce yourself
- Contact CLVEN (if applicable) and introduce yourself
    - Set up a time to talk within the next two weeks
    - Review any outstanding balances
    - Make sure the President and House Manager have had contact with them as well

Transitions

- Meet with the outgoing Vice President of Finance to transition
    - Review current goals and/or strategic plan
    - Review account balances, budget, paperwork, and cash flow
    - Collect any relevant records, tax paperwork, etc...from the outgoing officer
    - Discuss successes and challenges he encountered during his term
    - Gain suggestions and information on resources to utilize during your term
    - Review upcoming payments and deadlines
    - Ensure officer user permissions in OmegaFi/Vault have been updated to allow necessary access

- Change contact information with any service providers or other bills that the chapter may receive (e.g. utilities, internet services, etc.)
- Make signature changes for chapter checking account at the bank (if applicable)
- Attend Shared Vision Retreat with remainder of incoming Prudential Board
- Attend Calendar Planning Retreat with remainder of incoming Prudential Board

Training and Resources

- Register for Finance Summit
    - This can be done by logging into MyAlphaSig > Events > Finance Summit
- Complete Online Officer Training
    - This can be done by logging into MyAlphaSig ☐ Online Officer Training
- Secure and review copies of your chapter's:
    - Constitution and Bylaws
    - Calendar of events
    - Strategic plan and/or goals
- Items to Review
    - Check your chapter's account balance with IFC or any other campus board/council (e.g.
    - Programming Board, Greek Council, etc.).
    - Review all current accounts payable (invoices) and receivables (membership dues)
    - Ensure that Bill Pay and officer purchasing cards are updated as needed
    - Review any outstanding balances between the chapter and CLVEN (if applicable)
    - Membership roster and billing cycles/groups
- Review resources on the Alpha Sigma Phi website
- Review resource videos on the Alpha Sigma Phi Youtube channel