



Blue Star Mothers of America, Inc.
2025 Convention Training
Compliance
Sonya Kay Stowers
National 4th Vice President

What does the N4VP do?

1. Compliance
2. Chartering New Chapters
3. Assisting Chapters in need of help



What is Compliance for Blue Star Mothers Departments, Chapters, and Auxiliaries (D, C, As)?

That's easy - obviously it is the most fun part of being in BSMA and everyone's favorite!!

I ♥
Being
Compliant



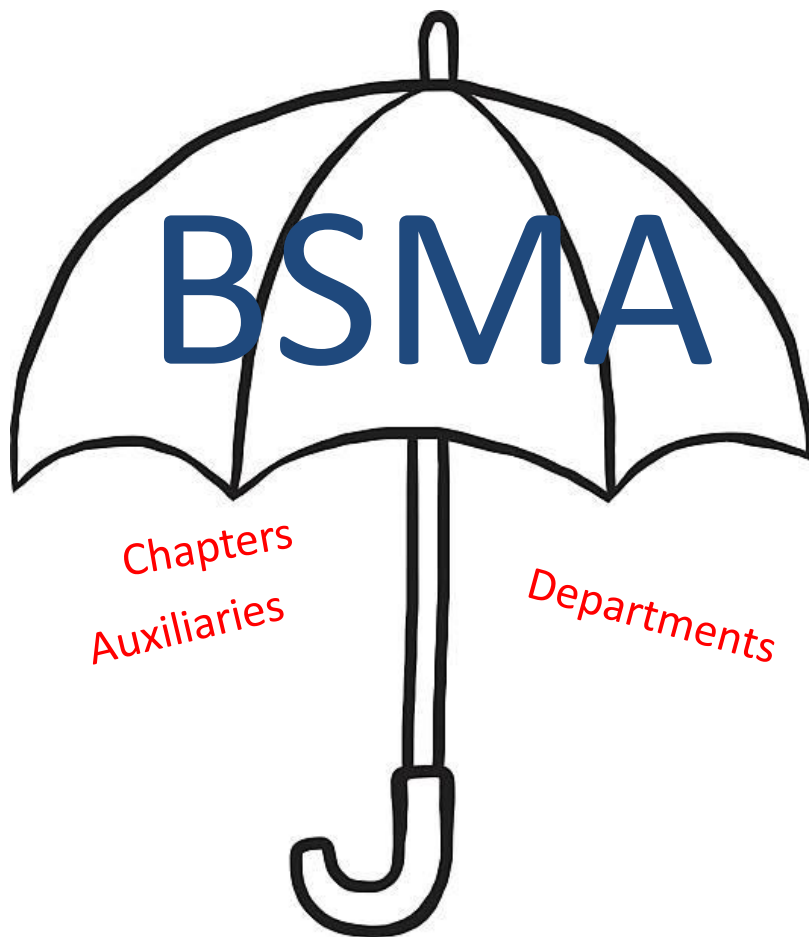
For BSMA, Compliance is a window of time every Fall for D/C/As to complete the required and necessary documents to maintain your status as a D/C/A in Good Standing.



What is the BSMA Compliance Window?
I'm glad you asked!
 All BSMA Compliance must be completed between
 September 1 and December 1 every year

What happens if we don't complete BSMA Compliance on time?
Another great question!
 Your D/C/A is considered late and will no longer be in Good Standing

BSMA Fiscal Year – September 1 through August 31, every year!



I have heard people talk about an “umbrella” – What is that?

The IRS can recognize the tax exempt status of a central organization, and then that organization may obtain a group exemption for subordinate organizations affiliated with it and under the general supervision/control of the central organization.

BSMA, Inc. is a 501(c)3 and has a Determination Letter from the IRS stating as much. BSMA also holds a group exemption, this allows all of our D/C/As to be part of the National group exemption **IF** the subordinate(s) is in Good Standing.

What does a D/C/A need to prove to its donors that it is a 501(c)3?

1. A copy of the BSMA Determination Letter
2. A letter from the BSMA National Treasurer noting the group exemption and stating that your D/C/A is in Good Standing. 4



P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248364843
Mar. 02, 2015 LTR 4167C 0
34-1008973 000000 00

00023381
BODC: TE

BLUE STAR MOTHERS OF AMERICA INC
% HELEN FRANZ
PO BOX 700048
SAN ANTONIO TX 78270



028333

Employer Identification Number: 34-1008973
Group Exemption Number: 1878
Person to Contact: Mrs. Towe
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Feb. 19, 2015, request for information about your tax-exempt status.

Our records indicate that you were issued a determination letter in July 1967, and that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Based on the information supplied, we recognized the subordinates named on the list you submitted as exempt from Federal income tax under section 501(c)(3) of the Code.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106 and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Doris Kenwright, Operation Mgr.
Accounts Management Operations 1

This letter is available on the BSMA website on the Financial tab.

BLUE STAR MOTHERS OF AMERICA, INC



Office of the National President

President
Rebecca Stagford
Missouri

First Vice President
Karen Stillwell
Ohio

Second Vice President
Karla Keller
Minnesota

Third Vice President
Jacqueline Ransom
Michigan

Fourth Vice President
Brenda Ternello
California

Recording Secretary
Amy Jo Hutchinson
Ohio

Financial Secretary
Sueya Kay
Illinois

Treasurer
Althea Tronell
Missouri

April 22, 2024

RE: 61-1774445
Blue Star Mothers of America, Inc
Chicagoland Blue Star Mothers, IL6

To Whom It May Concern:

This letter is to verify that the Chicagoland Blue Star Mothers, Chapter IL6 is under the Group Exemption Umbrella of Blue Star Mothers of America, Inc. Group number 1878 as shown in the Group Determination Letter from the IRS. Chicagoland Blue Star Mothers, Chapter IL6 was chartered by the Blue Star Mothers of America, Inc on January 13, 2016.

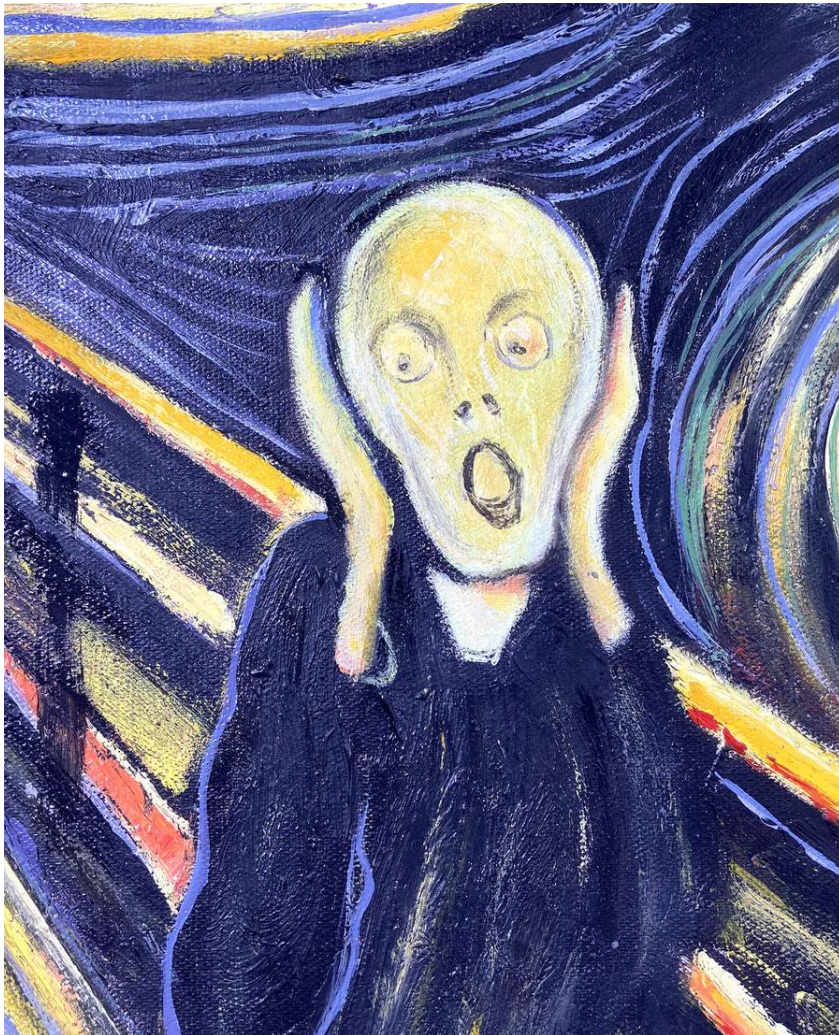
Respectfully,

This letter is available, upon request, from the National Treasurer. This letter can only be provided AFTER your annual Compliance is Complete and is only good for that one fiscal year!

How does that IRS stuff tie into Compliance?

Short answer – if you have not completed your Compliance then you are not in Good Standing. If you are not in Good Standing, then you cannot act as a subsidiary of BSMA – you cannot be a 501(c)3 without doing your Compliance and being in Good Standing.

**No Compliance = No Umbrella= No 501(c)3!
No checks from National either!**



OK, it's not THAT scary! We just have to do the work 😊

So how do we get our Compliance done so we can be in Good Standing?

Remember that the **Compliance Window** is the same every year
September 1 through December 1

That does not change, all documents and reports are due during this time frame!

There are 7 Components of Compliance

The following two reports are filed with the IRS or your State agencies, with digital copies emailed to 4VP@bluestarmothers.us

1. IRS Form 990 – Accepted
2. State Filing Requirements - these vary by State, please see the Chapter and Department Resources Tab on the National Website for information on your State requirements

The following reports are submitted using your D/C/A profile on the BSMA website:

3. EIN Report
4. Chapter Information Report
5. Officer Roster with signed Affiliation Agreement attached
 - If you are filing for a Department, submit the Department Officer Roster
 - If you are filing for a Chapter, submit the Chapter Officer Roster

Affiliation Agreement (AA) – Using only the Affiliation Agreement signed by the National Officers following the most recent convention, officers should sign this form to submit with your Officer Roster.

 - If you are filing for a Department, submit the AA with your Department President signature
 - If you are filing for a Chapter within a Department, submit the AA with your Dept. President signature
 - If you are filing for a Chapter without a Department, submit the AA signed only by the National Officers
6. Annual Report – this includes attachments for Bank Statement(s), Bank Signers Verification Letter, Balance Sheet (or Statement of Financial Position), and Profit and Loss Statement (or Statement of Activities).
7. VAVS Fee

Let's Break it Down!

Hard Problem

#1
Easier

#2
Easier

#3
Easier

Easy

Easy

Easy

Easy

Easy

Easy



Compliance Basic Training



Who is responsible for completing Compliance?

Another excellent question!

The entire Chapter Executive Board should be involved, the entire chapter should be aware of the process and help as needed!

Use only your **Chapter Profile log in credentials** to complete Compliance!

There is a **Compliance Guide** on the BSMA website –

1. Log in using the Chapter credentials
2. Click on either Compliance Forms or Compliance Guide in the red box menu on the right – it's in both places.

When you are contacted by the N4VP, N1VP, or a person from the financial document review team, **please READ their instructions and follow them** – we are trying to make it easier for you!

let's do this!

Every file name and **every email subject line** and every **document header NEEDS** to include your Chapter State and Number (**CSN**), or Department or Auxiliary Name – no exceptions!

Watch your President and Membership Chair emails for **Compliance Training Emails!** Share those emails with your team!

Reach out and ask any questions you have!

Some documents/reports are for the fiscal year just ended, others are for the fiscal year just starting – WHAT?!?!

For the fiscal year just ended:

1. 990
2. State Filings
3. Annual Report – including P&L, Balance Sheet, and Bank Statement



For the fiscal year just starting:

1. EIN Report
2. Chapter Information Report
3. Officer Roster and Affiliation Agreement
4. Annual Report – Bank Signers Verification Letter
5. VAVS Fund Fee

Special Note on Officer Rosters and Affiliation Agreements

- These are due immediately any time there is a change of officers
- These must be submitted immediately any time there is a change of officers – there is no window on this piece, it must be done immediately any time there is any change!
- These must be submitted at least once annually, immediately after elections even if no changes have been made

Special Note on Bank Signer Verification Letters

- These are required to be updated any time there is a change in Financial Secretary, Treasurer, or 1VP (for emergencies only).



- These 3 positions are the official signers on all bank accounts so this letter must be updated if there is a change in any of these positions!
- This must be submitted at least once annually as part of your compliance, even if there are no changes to these officers.

Report #1 – IRS 990

A thumbnail image of the top portion of an IRS Form 990. The form is titled "Form 990 Return of" and "Under section 501". It includes the Department of the Treasury and Internal Revenue Service logo. Section A is labeled "For the 2011 calendar year, or tax year b". Section B includes a checkbox for "Address change". Section C is labeled "Name of organization" and "Doing Business As".

Who? Every Department, Chapter, and Auxiliary

What? File a 990 with the IRS

When? Any time between Sept. 1 and Dec. 1, every year

Where? IRS website

Why? Well, because we are a business and it is required by the IRS!

How do I get a copy of this document to BSMA?

Excellent Question!

You send a copy of the IRS 990 showing a filing status of “Accepted” to the N4VP via email



But wait – **BIG QUESTION** – how do I get a copy of our 990 showing a filing status of “Accepted” to email it to the N4VP???

This process takes 2 steps and anywhere from minutes to a couple of weeks – time frame is up to the IRS!

Step 1: Log into the IRS website and file your 990N.

Step 2: Check back later – a few minutes, a few hours, a couple of weeks. Log back into the IRS website using the same log in credentials you used to file, navigate to the Manage 990N area, and check on the status of your submission. If it says filing status “Accepted” then click open that submission ID and your form is there! If it says “Pending”, then check back again later! No, the IRS will NOT contact you when this is ready, you must check!

WHAT EXACTLY DOES THIS IRS 990N WITH A FILING STATUS OF “ACCEPTED” LOOK LIKE?!?!?

Yet again, another excellent question!



Confirmation

[Home](#) | [Security Profile](#) | [Logout](#)

Your Form 990-N(e-Postcard) has been submitted to the IRS

- **Organization Name:** BLUE STAR MOTHERS OF AMERICA
- **EIN:** [REDACTED] [Your Dept/Chapter/Auxiliary EIN](#)
- **Tax Year:** 20[REDACTED] [Beginning Year of the Fiscal Year, IE will say 2024 for FY 2024-2025](#)
- **Tax Year Start Date:** 09-01-20[REDACTED] [Beginning Year of the Fiscal Year](#)
- **Tax Year End Date:** 08-31-20[REDACTED] [Ending Year of the Fiscal Year](#)
- **Submission ID:** 10065520232827071204 [Will vary, is assigned by the IRS](#)
- **Filing Status Date:** 10[REDACTED] [Filing should happen between 9/1 and 12/1 of the fiscal year](#)
- **Filing Status:** Accepted [This line must say Accepted for this to be the correct form to submit](#)

[MANAGE FORM 990-N SUBMISSIONS](#)

Example of an IRS 990 form showing a filing status of “Accepted”

Thanks for asking 😊





Report #2 – State Filings

Almost every state requires a form(s) to show the continued existence of your D/C/A.

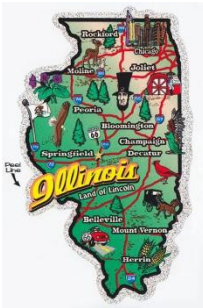


Every D/C/A is responsible for checking on the requirements of their state and making sure those are met and then reported to BSMA via email to the N4VP.

There's an amazing list on the BSMA website to help you know your state's requirements!

Cool – Where?!?

1. Log in to your profile or your chapter profile.
2. Click on Chapter and Department Resources in the red boxes to the right.
3. Scroll down to a list titled “State Income Filing Requirements (by State):”
4. Locate your State on the list, click it open, and see what is required!



After you file with your State, email digital copies of all State filings to the N4VP!

Report #3 – EIN Report



EIN Report

EIN Reporting Form

All Departments and Chapters - **EIN Report MUST BE FILED BY DECEMBER 1ST** for this fiscal year **AND THEN** updated each time there is a change in chapter mailing address or contact name to ensure that they are listed under the organizations 501(c)3 umbrella. Reimbursement checks are mailed to the address on this form **and will not be sent if not current.**

Complete the following and click submit. You do not have to mail this in if filed electronically. A copy of your form will be emailed to you.

Department or Chapter Full Name*

Department State (if reporting for a Dept)

Selection Set

- None
- OH
- MN
- MI

Chapter State and Number

Department or Chapter EIN*

The number above must be your own chapter or department EIN and you must NOT use the National EIN. **DO NOT Use 34-1008973**

Chapter or Department Mailing Address - Mailing Address*

P.O. Box 881		
Line 2		
Warrenville	Illinois	60555
United States		

Contact Person Name*

IL6	*Chicagoland Blue Star Mothers
-----	--------------------------------

Phone

Phone*

Email

Primary Email*

Submit

Why?

1. To confirm your EIN.
2. To make sure we have your current mailing address, and that the address used follows our governing documents.
3. So we can mail you things, like checks, and be sure you will get them!
4. Submit this form again if your address changes during the year!

Chapter Information Report

Chapter Name*

Chicagoland

Chapter State and Number*

IL6

The information provided on this form will be used as contact information on the public portion of the site. Please provide CURRENT information. Your meeting location, address, state, and zip fields are required since this information is used to populate the map locating all of our chapters. You will be required to provide a digital signature allowing use of this information on the public contact information page.

Because it is important for members and prospective members to be able to contact you, it is recommended you enter the Chapter PO Box number, and a chapter email address. Many sites provide free email addresses, or you can get one from 4vp@bluestarmothers.us for one from the organization.

Chapter President for this FISCAL YEAR*

Sonya Stowers

Email

Chapter Presidents Email*

president.il6@bluestarmothers.us

Phone

Chapter President Phone*

630-447-8173

Chapter Address - Mailing Address*

P.O. Box 881

Line 2

Warrenville Illinois 60555

United States

Area Served*

Meeting Date and Time*

2nd Thursday of each month at 6:30 pm

Meeting Location*

Warrenville VFW Post 8081

Meeting Address*

Meeting City*

State*

Zip*

Chapter Website

Submitted by: Chapter State and Number and Chapter Name

PLEASE DO NOT PUT YOUR PERSONAL NAME THIS IS TO BE SUBMITTED BY CHAPTER STATE AND NUMBER THEN THE NAME OF YOUR CHAPTER

Chapter State/Number & Name (not your name)*

IL6 *Chicagoland Blue Star Mothers

Email

Primary Email*

president.il6@bluestarmothers.us

Please type your name in the box below. Your typed name constitutes a digital signature. I understand that the chapter contact information provided above will be published on the public contact information page at www.bluestarmothers.org. I also understand that this information can be viewed by the general public.

Signature*

Submit

Report #4 – Chapter Information Report

Why?

1. To update your info on Locate A Chapter and ZeeMaps
2. To make sure any new/potential members have your correct contact information.



Report #5 – Officer Roster and Affiliation Agreement

Chapter Officer Roster

This form is to be used to submit your current chapter officer roster to National. The names of the officers and their emails are required. The information will be recorded in the database. This information will also be published in the secure, members only section of the national site. If there is no VAVS Rep or Blue to Gold Liaison please enter none

Submitted by*
IL6 *Chicagoland Blue Star Mothers

Email
Primary Email*
president.il6@bluestarmothers.us

Chapter Name*
Chicagoland

Chapter State and Number*
IL6

Chapter President Name (First & Last)*
Sonya Stowers

Chapter President Phone
Cell*

Email
Chapter Presidents Email*
president.il6@bluestarmothers.us

Chapter First VP Name (First & Last)*
Colleen Peterson

Email
Chapter First VP Email*
1vp.il6@bluestarmothers.us

Chapter 2VP Name (First & Last)

Email - Chapter Second VP Email

Chapter Third VP Name (First & Last)

Chapter Third VP Email

Chapter Fourth VP Name (First & Last)

Chapter Fourth VP Email

Chapter Recording Secretary (First & Last)*
Mary Zumbrock

Email
Chapter Recording Secretary Email*
recsec.il6@bluestarmothers.us

Chapter Financial Secretary (First & Last)*
Susan D'Alessandro

Email
Chapter Financial Secretary Email*
finsec.il6@bluestarmothers.us

Chapter Treasurer Name (First & Last)*
Rebecca Mysyk

Email
Chapter Treasurer Email*
treasurer.il6@bluestarmothers.us

Installed By*

Date*

Chapter Blue to Gold Liaison*
None

Blue to Gold Liaison Email (IF NONE PLEASE ENTER NONE)*

Chapters please provide the name of your Membership officer (Not Chapter President) to be added to the membership group for working with the database roster. Membership Chair must be 1VP or one of the Financial Officers.

Chapter Membership*
Rebecca Mysyk

Email*

Affiliation Agreement Signature Page
if there is a form attached from a previous submission, YOU MUST REMOVE THE OLD form before you can attach the new form.

Affiliation Agreement*
[IL6 2024-2025 Affiliation Agreement - signed.pdf remove](#)

Bank Signers Verification*
[IL6 2024-2025 Bank Signers Verification Letter.pdf remove](#)

Comments



Check out those awesome file names right there!!

Submit

When? Any time there is any change in officers, and once a year **immediately** following elections even if there are no changes.

Why? To be sure you are in Compliance with your officers and to be able to contact your D/C/A!


Special Note: Be sure emails are correct so we can reach out to you!

Affiliation Agreement (AA) –

1. Make sure it is the one most recently signed by the current National Executive Board (NEB). This is found on the Compliance Forms page.
2. Make sure you read the Governing Documents prior to signing – by signing you are committing to follow all our Governing Documents!
3. Sign on the line AND print your name below the line
4. Date the document and make sure your D/C/A is noted on the line at the top.
5. Attach this to your Officer Roster when you submit it.

Reminder – A new AA must be signed and submitted with an Officer Roster any time there is a change in Officers and once after elections even if there are no changes!





The individuals signing below hereby represent and warrant that they have read and understand the Agreement, are duly authorized to execute and deliver this Agreement, and this Agreement is binding in accordance with its terms.

FOR DEPARTMENT/CHAPTER/AUXILIARY _____ STATE & # _____

<u>Rebecca Stafford</u> as National President, Rebecca Stafford	_____	_____	as President
<u>Karen Stillwell</u> as National 1 st Vice President, Karen Stillwell	_____	_____	as 1 st Vice President
<u>Karla Keller</u> as National 2 nd Vice President, Karla Keller	_____	_____	as 2 nd Vice President
<u>Mary Johnson</u> as National 3 rd Vice President, Mary Johnson (pro Tem)	_____	_____	as 3 rd Vice President
<u>Sonya Kay</u> as National 4 th Vice President, Sonya Kay	_____	_____	as 4 th Vice President
<u>Amy Jo Hutchinson</u> as National Recording Secretary, Amy Jo Hutchinson	_____	_____	as Recording Secretary
<u>Carrie Beck</u> as National Financial Secretary, Carrie Beck	_____	_____	as Financial Secretary
<u>Jacqueline Ransom</u> as National Treasurer, Jacqueline Ransom (Pro Tem)	_____	_____	as Treasurer
_____	_____	_____	As Department President

DATE 3-21-2025 DATE _____

PLEASE SCAN THE SIGNATURE PAGE ONLY AND UPLOAD WITH THE OFFICER ROSTER
Contact 4412@blue-starmothers.org for any questions.

Report #6 – Annual Report, with attached Financial Documents

BSMA Compliance		
Annual Report Worksheet		
Question on Report	Answer	Notes
Membership Census (if none enter 0)		
Number of Paid Members		Why?
Number of Associates		
Number of Gold Star Mothers in Chapter		
Number of Big Dipper Members		
Number of Members/Associates Attended Convention VAVS Reps, Deputies, or Volunteers		
Membership Activities (if none enter 0)		
Number of VAVS Events		To have a view of how the organization as a whole is performing, to confirm that all D/C/As are following Internal Revenue Code to maintain our full organizational 501(c)3 status, to get help to D/C/As if needed, to
Number of VA Hospital Hours		
Number of Visits to Veterans (non-hospital)		
Number of Chaplain Visits		
Number of Chaplain Contacts		
Number of Civic-VSA Events		
Number of Community Events		
Number of Parades		
Number of Flags/Blue Star Banners Presented		
Number of Gold Star Banners Presented		
Number of Gold Star Events		
Number of Military Funerals/Memorials Attended		
Number of Member Funerals/Memorials Attended		
Number of Care Packages Sent		
Number of Cards/Letters to Military Members		
Number of Military Homecomings Attended		
Number of Homeless Veterans Projects		
Number of Military Events		
Number of Wounded Warrior Events		
Number of Legislative Initiative Events		
Number of Planned Major Fundraisers		
Announcements (if none enter 0)		
Speaking Engagements		educate our D/C/As on proper accounting if needed, etc...
Number of Radio Broadcasts		
Number of TV Broadcasts		
Number of Newspaper Articles		
Number of Online Articles		

Significant Events (if none enter 0)		
Number of National/Department President's Project		Please remember, every D/C/A is a business!
Number of Chapter President's Project		
Comments		
Primary Sources of Income (enter whole dollar amts, no dollar signs, no decimals, please round)		
Membership Dues		Please remember, every D/C/A is a business!
Sales of Merchandise		
Grants		
General Donations		
Restricted Donations		
Fundraising Income		
Total Monetary Income		
Functional Breakdown of Expenses (enter whole dollar amts, no dollar sign, no decimals, please round)		
Membership dues to National/Department		Donations given, care pkg supplies, etc... Advertising, Supplies, etc... Po Box, Rent, Business Cards, etc...
Cost of Goods Sold		
Restricted Donations Expense		
Program Expenses		
Fundraising Expenses		
Management Expenses		
Total Monetary Expenses		
Total In-Kind Donations Received		
Total In-Kind Donations Disbursed		
Attach Financial Documents		
Statement of Activity (Profit & Loss Stmt)		Always use the most recent AA, signed by the NEB in August of the fiscal year just ended
Statement of Financial Position (Balance Sheet)		
Bank Statement - Checking - ALL PAGES		
Bank Statement - Savings (if applicable) - ALL PAGES		
Bank Statement - PayPal (if applicable) - ALL PAGES		
Bank Signature Verification Letter		
Signed Affiliation Agreement		
Have you Filed with your State?(if applicable)		
		Answer yes, no, or not applicable - emails documents to 4VP@bluestarmothers.us

2023-2024 BSMA Annual Report Totals for all D/C/As!

Annual Report Totals Self Reported by BSMA D/C/As for FY 2023-2024 *	
Paid Members	4485
Associates	1584
Gold Star Mothers	259
Big Dipper Members	849
Number Members/Associates Attended Convention	197
VAVS	180
VAVS Events	414
VA Hospital Hours	4915
Visits to Veterans Non Hospital	1930
Chaplain Visits	76
Chaplain Contacts	552
Civic - VSO Events	445
Community Events	1576
Parades	243
Flags/Blue Star Banners Presented	293
Gold Star Banners Presented	165
Gold Star Events	189
Military Funerals/Memorials Attended	750
Member Funerals/Memorials Attended	58
Care Packages Sent	37,667
Cards/Letters to Military Members	132,873
Military Homecomings	136
Homeless Veterans Projects	223
Military Events	539
Wounded Warrior Events	48
Legislative Initiative Events	43
Planned Major Fundraisers	348
Speaking Engagements	563
Radio Broadcasts	168
TV Broadcasts	98
Newspaper Articles	298
Online Articles	488
National-Department Presidents Project	63
Chapter Presidents Project	104
Income/Revenue	
Membership Dues	\$ 374,833.00
Sales of Merchandise	\$ 247,197.00
Grants	\$ 169,218.00
General Donations	\$ 2,230,119.00
Donations	\$ 5,564,666.00
Fundraising Income	\$ 5,736,444.00
Total Monetary Income	\$ 14,322,477.00
Expenses	
Membership Dues to National/Department	\$ 68,552.00
Cost of Goods Sold	\$ 142,174.00
Restricted Donation Expense	\$ 3,692,391.00
Program Expenses	\$ 2,545,359.00
Fundraising Expenses	\$ 4,971,632.00
Management Expenses	\$ 3,299,364.00
Total Monetary Expenses	\$ 14,719,472.00
In Kind Donations	
Total In Kind Donations Received	\$ 2,546,712.00
Total In Kind Donations Disbursed	\$ 2,601,646.00



Just look what we did!!!

*These numbers are self-reported by BSMA D/C/As on their Annual Report as part of Compliance for fiscal year 2023-2024. This is the most recent data as of 7-15-25.

Sample Financial Documents

BSMA Sample P&L (include CSN in title)		
Statement of Activity/Profit & Loss Statement		
FY 20xx-20xx		
INCOME		
Donations Received		\$ 100.00
Fundraising Income		
Pasta Dinner	\$ 450.39	
Quarter Auction	\$ 400.00	
Total Fundraisers		\$ 850.67
Membership Income		\$ 550.00
Total Income		\$ 1,500.67
EXPENSES		
Membership Dues to Natl		\$ 300.00
Gold Star Programs		\$ 150.00
Program Expenses		
WWP Donation	\$ 50.00	
Veterans Homeless Shelter Donation	\$ 50.00	
Service Dogs LLC Donation	\$ 50.00	
Supplies for Irreverent Warriors Event	\$ 30.00	
Care Package Supplies	\$ 20.00	
Total Program Expenses		\$ 200.00
Management Expenses		
PO Box	\$ 200.00	
Business Cards	\$ 25.00	
Office Supplies	\$ 30.00	
Total Management Expenses		\$ 255.00
Fundraising Expenses		
Pasta Dinner Expenses	\$ 100.00	
Quarter Auction Expenses	\$ 52.39	
Total Fundraising Expenses		\$ 152.39
VAVS Fee		\$ 45.00
Total Expenses		\$ 1,102.39
Net Income		\$ 398.28

Tips and Tricks and Definitions:

1. **Accrual Basis of Accounting** – when it happens, not when money exchanges hands
2. Must have 2 FO signatures on checks
3. **Make sure your totals add up!**
4. Check for negatives – those will create questions, correct or explain up front!
5. **Be specific with categories** – no Misc., Other, or vague names. Do not use acronyms that are specific to your area without explaining them 😊
6. Reconcile your account statements every month!
7. **Every document needs your CSN in the file name and in the header of the doc!**
8. Both Financial Officers should have full access to accounting software/docs (finsec for monies in, treasurer for monies out). Other CEB members should have read only access.
9. **Submit this report once online, then follow your reviewer's instructions for getting updates sent in (usually email).**
10. **PAY DOWN YOUR ASSETS** – spend your funds on the Mission!

BSMA CSN			
Balance Sheet/Statement of Financial Position			
FY 20xx-20xx			
			Notes
ASSETS			
Bank Account	\$ 2,562.57		This should match your 8-31-24 bank statement
Savings Account	\$ 3,000.00		This should match your 8-31-24 bank statement
PayPal Account	\$ 25.00		This should match your 8-31-24 bank statement
Total Assets		\$ 5,587.57	Total of all accounts
LIABILITIES AND EQUITY			
Liabilities			
Outstanding Checks	\$ 25.00		This is used only if you have checks written that have not been cleared
Total Liabilities		\$ 25.00	Liabilities can be zero if you have nothing outstanding
Equity		\$ 5,562.57	This is the difference between assets and liabilities
TOTAL LIABILITIES AND EQUITY		\$ 5,587.57	This should match the total assets, thus "Balance"

Report #7 – VAVS Fund Fee

VA



U.S. Department
of Veterans Affairs

Transmittal Form

VAVS Fund

Chapter State and Number*

IL6

Number of Members in Chapter*

Chapter President*

Sonya Stowers

Treasurer*

Financial Secretary*

Amount Due (minimum \$45)*

\$ 45.00

Date Submitted*

Submitted By*

IL6 *Chicagoland Blue Star Mothers

Email

Primary Email*

president.il6@bluestarmothers.us

Next

The Compliance Review Team

- The N4VP heads the team and reviews IRS 990, State Filings, EIN Reports, Chapter Information Report, VAVS Fee.
- **The N1VP reviews Officer Rosters/Affiliation Agreements.**
- The National Financial Assistant leads the Financial Review Team and manages submissions and gets documents to reviewers.
- **The Financial Review Team members each takes a group of D/C/As and review their financial document submissions.**
- Only the N4VP can notify you that your D/C/A is fully complete with Compliance – anything from another team member regards only the portion they are reviewing.

BSMA Compliance Tracker for D/C/As									
Report	How to File	Reviewer	Date Submitted by D/C/A	Date Corrections/ Clarifications Requested if Needed	Date Corrections/ Clarifications Submitted per Instructions if Needed	Date Further Corrections/ Clarifications Requested if Needed	Date Further Corrections/ Clarifications Submitted if Needed	Date Approval Received from Reviewer	Date N4VP Notifies D/C/A compliance is fully complete
IRS 990	Email to N4VP	N4VP							
State Filing(s)	Email to N4VP	N4VP							
EIN Report	BSMA Website	N4VP							
Chapter Information Report	BSMA Website	N4VP							
Officer Roster	BSMA Website	N1VP							
Affiliation Agreement	BSMA Website	N1VP							
Annual Report	BSMA Website	Financial Review Team							
Bank Statement(s)	BSMA Website	Financial Review Team							
Bank Signers Verification Letter	BSMA Website	Financial Review Team							
Balance Sheet/ Stmt of Financial Position	BSMA Website	Financial Review Team							
Profit and Loss Statement/ Stmt of Activities	BSMA Website	Financial Review Team							
VAVS	BSMA Website	N4VP							

Timeline for Compliance

Remember, all compliance documents and reports must be submitted between September 1 and December 1 to be considered On Time submissions! After December 1, your submissions are LATE.



If you have not completed Compliance by Thanksgiving time, your DEB/CEB/AEB will receive an email from the N4VP reminding you to get it completed on time, with a list of what is still needed.

If you have not completed Compliance by early December, your DEB/CEB/AEB will receive another email from the N4VP with a late notice and a list of what is still needed from you.



If you have not completed all of Compliance by mid January, your DEB/AEB/Entire Chapter membership will receive an email stating that you are well past due, with a list of what is missing, and a reminder that it is everyone's responsibility to make sure their D/C/A is compliant.

Best Practice: Complete all of Compliance between September 1 and December 1 (on time!) so you can get that amazing email from the N4VP letting you know Compliance is Complete and can focus on our Mission!



And just like that,
you have completed Compliance!



Any Questions???

ANY
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