

# THE TRIPP-JONES FAMILY

## ANNUAL BUDGET TEMPLATE

---

*Prepared by the Treasurer — reviewed and approved by the Finance Committee each December*

# Instructions

---

The Treasurer prepares this budget each December for the coming fiscal year (January 1 – December 31). Present to the Finance Committee for approval before January 1<sup>st</sup>. Distribute to the family within 14 days of approval. File a copy with the Secretary.

FISCAL YEAR: _____ Prepared by: _____ Date: _____
Approved by Finance Committee on: _____

## SECTION 1 — PROJECTED INCOME

---

Income Source	Projected Amount
Family donations (voluntary)	\$
Fundraiser #1: _____	\$
Fundraiser #2: _____	\$
Fundraiser #3: _____	\$
Reunion registration surplus (if any)	\$
Other income: _____	\$
<b>TOTAL PROJECTED INCOME</b>	<b>\$</b>

## SECTION 2 — PROJECTED EXPENSES

---

### 2.1 Reunion Support

Expense	Budget
Reunion host assistance grant	\$
Contingency / emergency reunion fund	\$
Subtotal — Reunion Support	\$

### 2.2 Family Historian

Expense	Budget
Archival materials and storage	\$
Genealogy research / database subscriptions	\$
Reunion display / presentation materials	\$
Other Historian expenses	\$
Subtotal — Family Historian	\$

### 2.3 Social Media & Communications

Expense	Budget
Website hosting and domain	\$
Graphic design / printing	\$
Email platform subscription	\$
Other communications expenses	\$

Expense	Budget
Subtotal — Communications	\$

## 2.4 Executive Committee Operations

Expense	Budget
Meeting platform subscriptions	\$
Postage and mailing costs	\$
Office / administrative supplies	\$
Other administrative expenses	\$
Subtotal — Operations	\$

## 2.5 Benevolence Fund Reserve

Expense	Budget
Benevolence Fund contribution (recommended: 15% of income)	\$

## 2.6 Contingency Reserve

Expense	Budget
Contingency reserve (minimum 10% of total budget)	\$

## Budget Summary

Summary Line	Amount
TOTAL PROJECTED INCOME	\$
TOTAL PROJECTED EXPENSES	\$
PROJECTED SURPLUS / (DEFICIT)	\$
Opening Balance (January 1)	\$
Projected Closing Balance (December 31)	\$

## SECTION 3 — MID-YEAR ACTUAL vs. BUDGET TRACKING

Update this section at mid-year (June 30) to track performance against budget. Present to Finance Committee at the next meeting.

Category	Budgeted	Actual (Mid-Year)
Total Income	\$	\$
Reunion Support	\$	\$
Family Historian	\$	\$
Communications	\$	\$
EC Operations	\$	\$
Benevolence Fund	\$	\$
Contingency	\$	\$
NET (Income – Expenses)	\$	\$

# Finance Committee Approval Signatures

---

\_\_\_\_\_  
Treasurer — Printed Name & Signature    Date: \_\_\_\_\_

\_\_\_\_\_  
President — Printed Name & Signature    Date: \_\_\_\_\_

\_\_\_\_\_  
Vice-President — Printed Name & Signature    Date: \_\_\_\_\_

**District Leader Signatures (Finance Committee):**

\_\_\_\_\_  
Americus District Leader — Printed Name & Signature

\_\_\_\_\_  
DMV District Leader — Printed Name & Signature

\_\_\_\_\_  
Atlanta District Leader — Printed Name & Signature

\_\_\_\_\_  
Florida District Leader — Printed Name & Signature