



ABOUT the LEADER



Dan Hotchkiss consults with synagogues and churches on strategic and financial planning, conflict management, clergy transition, and fund raising. Dan speaks and writes widely on leadership and organizational life, and has been a leader, minister, and consultant for over 25 years. Dan has served as a parish minister and national ministerial placement director for the Unitarian Universalist Association. He lives near Boston, Massachusetts.

▼ UPCOMING Seminar



"Dan has a very inviting and relaxed demeanor. He is knowledgeable and a good presenter." — Anonymous

Budgets, Investments, and Financial Planning

(A LARGE CONGREGATIONS SEMINAR)

February 26–28, 2008

Led by Dan Hotchkiss

Simpsonwood Conference and Retreat Center, Norcross, GA

TUITION ** Member: \$475 / Nonmember: \$525

ROOM & BOARD ** Single: \$325 / Double: \$230 / Commuter: \$180

This specially-designed Large Congregations Seminar is for clergy, board members, and administrative staff in churches whose very size means that their budgets, investment strategies, and overall financial planning require at the very least the skills of an MBA combined with the wisdom of Solomon!

You will learn about

- The fiduciary duties of a congregation's leaders.
- Articulating the financial side of mission
- Financial self-assessment: key things to measure & how to set up periodic reviews
- Necessary policies and processes regarding budgeting
- Fiscal management
- Gifts and donors
- Compensation and benefits
- Major purchases and debt
- Endowments and investment
- Audits and reports
- Record keeping and retention

This course will help participants to clarify who will make what decisions, and identify the topics every congregation must address in order to fulfill their duties as caretakers and as leaders.

Register online: www.alban.org or call 1-800-486-1318, ext. 247