

F15.0 DISTRIBUTION OF FINANCIAL INFORMATION TO THIRD PARTIES

SCOPE

All financial information regardless of form requested by a third party.

POLICY

From time to time the *Society* will be requested to supply financial information to third parties. Such a request may help ensure compliance with a license that the *Society* is a party to, or may be needed to satisfy the terms of a funding application. In all instances, and regardless of the form it takes, the Executive Director or the Treasurer must first approve of the distribution before it is released.

PROCEDURE

1. The employee receiving the request shall prepare the financial information in the format requested by the third party.
2. The information should be clearly marked audited or unaudited, as appropriate.
3. The financial information shall then be given to the Executive Director or the Treasurer for review and approval. The purpose and the intended use of the requested material, and the source of the request, should also be made clear.
4. The Executive Director or the Treasurer shall authorize distribution of the information by initialing the *Society's* pre-printed Request for Information Form.