

## PTA/PTSA President's Information Sheet

President: Keeping track of the following information throughout the year will help you when it comes time to fill out important forms and awards applications. Keep in a safe place – some information is confidential. At the end of your term, pass this on to the new President to help him/her get started.

**LOCAL UNIT NAME:** \_\_\_\_\_ PTA / PTSA (circle one)  
(As stated on your Bylaws)

**\*PTA ID #** (8 digit # for cards): \_\_\_\_\_ **Florida PTA REGION:** 5

**\*EIN #** (for tax forms & bank accounts): \_\_\_\_\_

FL. DEPT. OF REVENUE SALES TAX-EXEMPT # (if any): \_\_\_\_\_

**INSURED BY:** \_\_\_\_\_ **POLICY #:** \_\_\_\_\_ **EXPIRATION:** \_\_\_\_\_  
(At minimum, Units must have general liability and fidelity bond insurance.)

**\*BYLAWS APPROVAL DATE:** \_\_\_\_\_

(Bylaws are current for 3 years from the above date, see <http://www.floridapta.org> for Bylaws template)

**FINANCIAL AUDIT COMPLETED:** \_\_\_\_\_ **SENT TO FLPTA** ([audit@floridapta.org](mailto:audit@floridapta.org)): \_\_\_\_\_

**FILE TAXES (990N, 990ez, or 990):** \_\_\_\_\_ **SENT TO FLPTA** ([990@floridapta.org](mailto:990@floridapta.org)): \_\_\_\_\_

**PTA MEMBERSHIP LAST YEAR:** \_\_\_\_\_

**PTA MEMBERSHIP THIS YEAR** (\$3.50 per member sent to Florida PTA monthly) Record the number of new members submitted each month.

<b>Aug</b>	<b>Sept</b>	<b>Oct</b>	<b>Nov</b>
<b>Dec.</b>	<b>Jan.</b>	<b>Feb.</b>	<b>Mar.</b>
<b>April</b>	<b>May</b>		<b>TOTAL</b>

(State/National combined dues should be submitted monthly to Florida PTA as collected. Check the Florida PTA website for the final payment deadline. See [www.vcsedu.org/community-information-services/volusia-county-council-ptas-vccpta](http://www.vcsedu.org/community-information-services/volusia-county-council-ptas-vccpta) for dues information and payment form.)

**VOLUSIA COUNTY COUNCIL PTA (VCCPTA) DUES PAID THIS YEAR (date):** \_\_\_\_\_

**Send calendar, approved budget & verification of insurance to VCCPTA Area Coordinator:** \_\_\_\_\_

**ATTENDANCE at VCCPTA and Florida PTA Events and Training:** note # & names of those attending

<b>VCCPTA Leadership Training*</b>	<b>VCCPTA Events</b>	<b>FLPTA Events</b>
<b>July</b> _____ _____	<b>Breakfast</b> _____ _____	<b>Convention</b> _____ _____
<b>Aug</b> _____ _____	<b>Reflections</b> _____ _____	<b>Legislation Conf.</b> _____ _____
<b>Aug</b> _____ _____	<b>Founder's Day</b> _____ _____	
<b>Sept</b> _____ _____	<b>End of Yr Banquet</b> _____ _____	

\* Pres. & Treas. are required to attend annually per compliance however, all officers are encouraged to attend.

**Important:** it is the responsibility of the current year PTA/PTSA officers to ensure the newly voted officers are registered with Florida PTA. Link to online registration: <https://floridapta.org/new-or-returning-officers-form/>