Treasurer Recruitment Guide

Use this checklist to recruit, confirm, and onboard a qualified treasurer for your campaign. Move through each section carefully and check off each item once completed.

☐ Understand the Role of a Treasurer

You understand that a treasurer is legally responsible for campaign finance compliance and reporting.

Confirm the following:

- The treasurer tracks all contributions and expenses.
- The treasurer files required finance reports on time.
- The treasurer ensures compliance with state and local laws.
- The treasurer maintains accurate financial records.

You understand this role is mandatory and high responsibility.

☐ Identified Potential Treasurer Candidates

You have identified individuals who are trustworthy, organized, and detail-oriented.

Potential candidates:

1. _____
2. _____
3. _____

You are selecting based on reliability — not just convenience.

☐ Confirmed Legal Eligibility

You verified that your chosen treasurer meets all legal requirements.

Complete the following:

- Residency requirements (if applicable): _____
- Restrictions (e.g., candidate cannot serve as treasurer, if applicable): _____
- Any required registration steps: _____

You confirmed eligibility through official sources.

☐ Conducted a Clear Outreach Conversation

You explained the role honestly and transparently.

You covered:

- Expected time commitment
- Legal responsibilities
- Reporting deadlines
- Support/resources available

You did not minimize the responsibility.

☐ Secured Formal Agreement

Your treasurer has clearly agreed to serve.

- Treasurer Name: _____
- Agreement date: _____

They understand their role and have committed to it.

☐ Completed Required Paperwork

All official forms naming your treasurer are completed and ready (or filed, if required).

- Forms completed: Yes / No
- Submission method: _____
- Submission deadline (if applicable): _____

Your campaign now has a compliance anchor.

☐ Established Financial Systems

You have agreed on how finances will be tracked and managed.

Confirm:

- Bank account setup plan
- Expense approval process
- Receipt storage system
- Contribution tracking method
- Reporting calendar

You have created structure before raising or spending money.

☐ Scheduled Compliance Check-Ins

You and your treasurer have agreed to regular communication.

- Check-in frequency: _____
- Next scheduled review date: _____

You are proactive, not reactive, about compliance.

☐ Ready to Fundraise Legally

After completing this checklist:

☐ I am legally ready to raise and spend campaign funds.
☐ I need to complete remaining compliance steps.

Outstanding items (if any): _____

Your campaign now has legal foundation and financial accountability.

Before moving forward:

If you can check these boxes honestly and confidently, you are ready to activate your First 10 Supporters and begin building visible momentum.