



Annual Vestry Report Requirements

The following items should be included in every annual vestry report. If you have any questions, please contact your Territorial Archdeacon or the Secretary-Treasurer. For questions regarding the financial statements, please contact Ms. Jacqueline Davison, Director of Finance.

- Title page including the name and location (municipality) of the church and the date of the vestry meeting.
- Meeting agenda
- Minutes of the previous annual vestry meeting and any special vestry meetings held since.
- Rector's Charge to Vestry (if this is presented the morning of the vestry meeting, please ensure a copy is included in the vestry reports sent to the Bishop's office and to the Territorial Archdeacon)
- Bishop's Letter
- Wardens' report
- Deacon's report (if applicable)
- Group and committee reports including group/committee financials
- Nominating Committee report (a list of the Parish Council established at the vestry meeting should be sent with the vestry report to the Bishop's office and Territorial Archdeacon.) Please note: according to the Diocesan Constitution, alternate lay delegates equal in number to lay delegates must be elected at the annual vestry meeting and are members of the Parish Council.
- Cemetery report (if applicable)
- Financials, including:
 - Financial statement to year-end
 - Budget for the upcoming year
 - List of investments
 - Balance sheet
 - Cemetery financial statements (if applicable)
 - Chapel of Ease financial statements (if applicable)
 - Audit/Review statement (a statement that the financial records have been independently reviewed by someone other than the treasurer or wardens. The statement must be signed by the reviewer.)
 - If your parish publishes the financial statements separately from the vestry reports, please ensure that a copy of the financials accompanies the reports sent to the Bishop's office and your Territorial Archdeacon.

All vestry reports are to be received by the Bishop's Office and by your Territorial Archdeacon no later than March 31, 2024.