

North Coast Association of Health Underwriters

ORGANIZATIONAL TIMELINE

MONTH	NCAHU	CAHU	NAHU
JULY	In-coming Board members take office		
AUGUST	Notify NAHU of dues increases before September 1		
SEPTEMBER			
OCTOBER	<p>If the association grosses more than \$25,000, a non-profit tax return is due October 15 unless an extension is filed</p> <p>State law requires that members are given an annual financial report</p> <p>Education Symposium (formerly HI Today)</p>	Board meeting and Sales Conference	
NOVEMBER			
DECEMBER	Nominations Committee composed of the President-Elect, Immediate Past President, and two appointed members might want to start looking for candidates for the NCAHU Board		
JANUARY	<p>Make plans for NCAHU Board members to attend NAHU's Cap Conference</p> <p>Dues increases (if any) take affect January 1</p>	CAHU Board meeting	
FEBRUARY	If an extension was filed, a non-profit tax return is due February 15		
MARCH	<p>Appoint delegates to CAHU's House of Delegates in May</p> <p>Accept the slate of nominees for the NCAHU Board as developed by the Nominations Committee and approve presentation of the nominees to the membership for a vote at the annual membership meeting</p>	Board meeting (at which CAHU's positions on legislation will be adopted)	Cap Conference in Washington, D.C.
APRIL	<p>Appoint delegates to NAHU's House of Delegates in June</p> <p>Schedule the annual membership meeting in the second quarter of the calendar year. Send written notices of the meeting with date, time, location, and slate of nominees to the Board between 14 and 90 days before the meeting. The following business should be conducted:</p> <ul style="list-style-type: none"> ▪ Election of Board members ▪ Ratification of actions taken by the Board during the previous 12 months ▪ Notify the members of any change in outside CPA firms and/or legal counsel 		

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MAY		House of Delegates meeting in Sacramento Day at the Capitol in Sacramento	
JUNE	Consider strategic planning for the coming fiscal year which begins July 1 State law requires the adoption of an annual budget for each fiscal year		Annual Convention

NOTE: NCAHU Bylaws require the Board to meet at least once each quarter. To fulfill fiduciary responsibilities, the NCAHU Board should note and file financial statements at each Board meeting.