

# Church Treasurer

## Result Expected

An effective church treasurer disburses all funds received into the church treasury in a responsible and organized manner, with funds identified and bills paid when due, so that the ministry of the congregation can be effective.

## Spiritual Gifts and Qualifications Helpful for the Job

- This leader benefits from having one or more of these spiritual gifts: administration, discernment, giving, faith, and helping.
- Useful skills and experiences for this position are skills and interest in financial matters; ability to keep detailed, accurate records and maintain appropriate confidentiality; passion for financially supporting the mission of making Christian disciples for the transformation of the world; and ability to work with individuals and ministry teams.
- This leader needs skill in searching for new revenue sources along with an understanding of biblical stewardship and management of all resources that God provides.
- The financial secretary and treasurer roles should be held by two people who are not immediate family members.
- The congregation's committee on nominations and leadership development may establish specific standards for this position.

## Responsibilities of the Position

- The treasurer will disburse all money contributed to the local church budget, keeping accurate records of how money is spent.
- This leader works with finances according to the guidelines established by the committee on finance for total fiduciary responsibility. This includes maintaining compliance with all applicable governmental tax guidelines.
- The treasurer will send all world service and conference benevolence funds on hand to the conference treasurer each month.
- The treasurer works with the financial secretary to maintain records of all funds received. Designated gifts and bequests are managed by the trustees in accordance with *The Book of Discipline*.
- This leader works with the financial secretary and chair of the committee on finance to make regular financial reports to the committee on finance, church council, the charge conference and, in some cases, the trustees.
- There are three tasks not specifically assigned to the treasurer, financial secretary, or the chairperson of the committee on finance by the *Discipline*. Keeping these responsibilities separate is essential in maintaining segregation of duties. These tasks are: (1) approving payments for expenditures; (2) signing checks; (3) reconciling bank accounts. While the treasurer, financial secretary, or finance chairperson may be authorized to do any one of these tasks, no person should be authorized to do more than one. No persons related to one another should perform any two or more of these three tasks.

- This leader is accountable to the charge conference through the church council.

## Getting Started

- Talk with the pastor and others to understand their hopes and dreams for the congregation and for your financial leadership role in advancing toward the vision for ministry.
- Set aside time for prayer. Express your concerns, joys, and observations to God; and listen for God's direction for your leadership. Ask God for direction about wise management of the congregation's financial resources. Ask God to increase the understanding you and your congregation have for the role of stewardship in forming Christian disciples.
- Talk with people in your congregation who have (or have had) responsibilities similar to yours. Work closely with the financial secretary and chair of the finance committee to keep abreast of the changes in financial processes (institutional regulations as well as cultural changes, such as the trend toward electronic money management).
- Evaluate the financial processes of your congregation and collaborate with other finance leaders to improve these processes.
- [Study Guidelines for \*Leading Your Congregation, 2017-2020: Finance\*](#) and participate in training experiences.

## People and Agencies That Can Help

- Your pastor and people in your congregation and community.
- Office of Stewardship at Discipleship Ministries, [stewardship@umcdiscipleship.org](mailto:stewardship@umcdiscipleship.org); Website: [www.umcdiscipleship.org/stewardship](http://www.umcdiscipleship.org/stewardship).
- Ken Sloane, [ksloane@UMCdiscipleship.org](mailto:ksloane@UMCdiscipleship.org), Discipleship Ministries, P.O. Box 340003, Nashville, TN 37203-0003; (877) 899-2780; <http://www.umcdiscipleship.org/leadership-resources/stewardship>.
- Don Joiner, [djoiner@UMCdiscipleship.org](mailto:djoiner@UMCdiscipleship.org), Discipleship Ministries, P.O. Box 340003, Nashville, TN 37203-0003; (877) 899-2780; [www.umcdiscipleship.org](http://www.umcdiscipleship.org).
- InfoServ, the information service for the church, provides current information about United Methodist resources, programs, and staff services. Email: [infoserv@umcom.org](mailto:infoserv@umcom.org); Website: [infoserv.umc.org](http://infoserv.umc.org).

## Web and Print Resources

- [\*Afire with God: Becoming Spirited Stewards\*](#) by Betsy Schwartztraub (Nashville: Discipleship Resources, 2007)
- [\*The Book of Discipline of The United Methodist Church, 2016\*](#) (Nashville: The United Methodist Publishing House, 2016)
- [\*Celebrating the Offering\*](#) by Melvin Amerson and James Amerson (Nashville: Discipleship Resources, 2007)
- [\*Committed to Christ: Six Steps to a Generous Life\*](#) (Abingdon Press, 2012) by Bob Crossman
- [\*Creative Giving: Understanding Planned Giving and Endowments in Church\*](#) by Michael Reeves, Rob Farley, and Sanford Coon (Nashville: Discipleship Resources, 2015)
- Discipleship Ministries, [www.umcdiscipleship.org/leadership-resources/church-leaders](http://www.umcdiscipleship.org/leadership-resources/church-leaders); toll free 1-877-899-2780, email [info@umcdiscipleship.org](mailto:info@umcdiscipleship.org)
- Ecumenical Stewardship Center, <https://www.stewardshipresources.org>

- [Electronic Giving](#)
- [Enough: Discovering Joy Through Simplicity and Generosity](#) by Adam Hamilton (Abingdon Press, 2009)
- [Extraordinary Money: Understanding the Church Capital Campaign](#) by Michael D. Reeves (Nashville: Discipleship Resources, 2007)
- [Extravagant Generosity](#) by Michael Reeves, Robert Schnase and Jennifer Tyler (Abingdon Press, 2011)
- [Faith and Money: Understanding Annual Giving in Church](#) by Michael D. Reeves and Jennifer Tyler (Nashville: Discipleship Resources, 2003)
- [Five Practices of Fruitful Congregations](#) by Robert Schnase (Abingdon Press, 2007)
- [Guidelines for Leading Your Congregation, 2017-2020: Finance](#) (Cokesbury, 2016)
- [Interpreter](#), [www.interpretermagazine.org](http://www.interpretermagazine.org)
- [Let the Children Give: Time, Talent, Love and Money](#) by Delia Halverson (Nashville: Discipleship Resources, 2007)
- Lewis Center for Church Leadership at Wesley Seminary, [www.churchleadership.com](http://www.churchleadership.com)
- Luther Seminary, Stewardship, [www.luthersem.edu/stewardship](http://www.luthersem.edu/stewardship)
- [Ministry and Money: A Practical Guide for Pastors](#) by Janet T. and Philip D. Jamieson (Louisville: Westminster/John Knox Press, 2009)
- [Not Your Parents' Offering Plate](#) by Clif Christopher (Abingdon Press, 2015)
- [Simple Rules for Money: John Wesley on Earning, Saving, and Giving](#) by James A. Harnish (Nashville: Abingdon Press, 2010)
- [A Spirituality of Fundraising](#) by Henri Nouwen (Upper Room Books, 2011)
- [Stewardship in African-American Churches: A New Paradigm](#) by Melvin Amerson (Discipleship Resources, 2015)
- Stewardship Facebook Page, <http://www.facebook.com/umcstewardship>
- [umcgiving.org](http://umcgiving.org) – UMC GIVING.org will help you explain how United Methodists give through our connection and are able to do things no one church could do alone.
- [The United Methodist Church Financial Records Handbook, 2017-2020](#) (Cokesbury, 2017)
- [Whose Offering Plate Is It?](#) by Clif Christopher (Abingdon Press, 2010)

<http://www.umcdiscipleship.org/resources/church-treasurer>



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The people of The United Methodist Church\*