

Local finance volunteers

Local finance volunteers are what we collectively call treasurers and finance contacts and they are responsible for the financial activity in a local group. They're essential for ensuring our local groups run successfully and continue to benefit people affected by Parkinson's in their area.

Purpose of the role

1. To provide guidance to the local group on internal control and financial procedures.
2. To record your local group's financial activity accurately and in a timely manner.
3. To keep both your local group and UK office informed of your local group's financial position in line with reporting requirements.

Key tasks and responsibilities

Below is a list of the tasks and responsibilities you must undertake as a finance volunteer, with links to more information that you may find useful. We've identified the sections you must read and others that may be useful if you need them. For a full list of guidance available to local group volunteers, see the Introduction and Index.

Maintain a local bank account(s) in the charity's name and be a signatory on the account	
Must read	Optional
Bank accounts	Closing accounts
Cash pooling	Depositing funds
Guidance for signatories	Interest

Moving funds between your group and UK Office	Online banking
Signatories	Other ways to bank
	Payments requiring approval
	Petty cash
Ensure financial transactions are handled appropriately and safely	
Must read	Optional
Cash	Contactless card devices
Making cheque payments	Events
Money coming in	In memoriam donations
Paying for things	Trading
Accurately record financial activity	
Must read	Optional
Bank reconciliations	Cashbook categories
Invoices and receipts	
Keeping a cashbook	
Retaining documents	
Keep track of all local group assets, ensuring arrangements for their safekeeping are in place	
Must read	Optional
Purchases and Equipment	Gifted items
Be an active member of your group's lead volunteer team, including attending all meetings in person or via Zoom as far as is practicable	

Keep the group and the Parkinson's UK Local Networks Finance Team informed of the group's financial position using relevant reporting	
Must read	Optional
Annual Financial Return	Annual Financial Return for Sub Groups
Budgets	Independent Examination
Reporting	
Advise your local group on Parkinson's UK financial policies, internal controls and appropriate use of funds	
Must read	Optional
Charging for local group activities	Gift Aid
Internal Control	Large donations and legacies
Paying volunteer expenses	Raising funds
Related party transactions	Restricted funds
Reserves and transfers	
Use of funds	
Make sure that all financial decisions are agreed by lead volunteers and recorded	

Training

As well as finance volunteers being required to read the 'must read' sections above, there is [training](#) available that these volunteers, and any other group volunteers who may be interested, can join to find out more.

Checks

Before starting, local finance volunteers will need to supply two references and do not require a criminal record check. However, banks will perform a credit check on anyone becoming a signatory and you cannot be a finance volunteer if you have been declared bankrupt.