

TRANSITIONAL DOCUMENT REVIEW

Report Form

This Report completed by:

Conference: _____

Date: _____

For what congregation/parish

Those present at the meeting

_____ (pastor)

Pastoral Records: Are the following records up-to-date?

- 1. Records of membership, baptisms, confirmations, marriages, births, funerals, transfers, and communions; () yes () no
- 2. Annual congregational report forms (parochial reports) and recent congregational meeting reports and Council minutes; () yes () no
- 3. Perspective members list; () yes () no
- 4. Sick and shut-in's list, and other pastoral situations needing special attention; and () yes () no
- 5. Congregational mailing/address list. () yes () no

By the time the Assistant to the Bishop meets with the Call Committee, to identify a list of perspective candidates, all of these documents should be up-to-date.

Financial Records:

1. Where is the title for the church property? _____
2. Are the records of the church treasurer and the financial secretary up-to-date? () yes () no
3. Has the church filed its yearly report with Revenue Canada? () yes () no
4. Who is responsible to file with Revenue Canada? _____
5. Does the church have RSP's or other investments? () yes () no
6. If so, where are they located? _____
7. Who has responsibility for oversight of the investments? _____
8. Where is the church insurance policy? _____
9. Who sees that it is current? _____
10. Who has keys to the church? _____
11. Is there a safe? () yes () no
12. If so, who has the combination? _____

(pastor)

(Council President)

(Dean of the Conference)

*The Dean of the Conference is asked to forward this report form to the
Eastern Synod of the Evangelical Lutheran Church in Canada
74 Weber Street West
Kitchener, Ontario N2H 3Z3*