



## ANNUAL REPORTING Requirements for CHAPTERS

**Due no later than March 31, 2026**

- Chapters are required to submit an **Annual Report** to CAMFT to remain in compliance.
- Required reports are listed below
- Reports may be emailed **individually or as one package** to [mchampion@camft.org](mailto:mchampion@camft.org)

### General (Jan – Dec 2025)

- Click [here](#) to answer questions related to Staff/Independent Contractors, Accounting system, financial duties & Election procedures

### Board Roster (Current)

- **In EXCEL format**
- Please include:
  - All CHAPTER officers, directors, and committee chairs
  - Titles and Term limits for each position
  - Vacant positions, if you have any
  - **Email addresses that board members/chairs are monitoring frequently (Chapter or personal)**
    - These email addresses will be added to the Listserv
    - We will not inundate leaders with emails

### Membership (Jan – Dec 2025)

- Click [here](#) to answer a few general questions related to membership
- Provide 2026 Member Roster:
  - **In EXCEL format**
  - Please include:
    - ONLY current members of your Chapter
    - CAMFT ID number
    - First & Last Name
    - License #
    - Email address
    - Mailing address

### Financial reports (Jan – Dec 2025)

#### **I. For chapters on calendar year accounting (Jan – Dec), the following reports are required by March 31, 2026**

1. PROFIT & LOSS STATEMENT: Showing all income and expenses for your chapter's financial year-end 2025
2. BALANCE SHEET: Include total assets, liabilities, and equity for your chapter's financial year-end 2025
3. BUDGET for 2026
4. PROOF of taxes filed in 2025 for the 2024 calendar year-end

#### **II. For chapters on fiscal year accounting (not Jan - Dec), the following reports are due as indicated:**

1. PROFIT & LOSS STATEMENT: Showing all income and expenses for your chapter's calendar year-end 2025  
**By March 31, 2026**
2. BALANCE SHEET: Include total assets, liabilities, and equity for your chapter's calendar year-end 2025  
**by March 31, 2026**
3. PROOF of taxes filed in 2025 for the 2024 calendar year-end **by March 31, 2026**
4. BUDGET for 2026, as well as fiscal year-end P&L Statement and fiscal year-end Balance Sheet – **60 days after the close of your fiscal year**

#### Events (Jan – Dec 2025)

- **In EXCEL format**
- Provide a list of your 2025 events, including:
  - Title of event
  - Date of event
  - Virtual or in-person
  - Number of attendees per event
  - Fee charged per event
  - Type of event (e.g., Board meeting, **CE event**, Social, etc.)

#### DEIA+ (Jan – Dec 2025)

- A brief report in BULLETED format outlining your Diversity, Equity, Inclusion, and Accessibility initiatives in 2025, as it pertains to your Board, Membership, Programs, Mission, etc.
- Include links where appropriate
- Resource: Previous submissions are summarized [here](#)

#### Pre-Licensed/3,000 Club (Jan – Dec 2025)

- ALL Chapters need to complete this questionnaire, even if you do not have a Pre-Licensed/3,000 Club
- Click [here](#) to answer a few general questions

*Thank you!*

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### Provide upon renewal ONLY

#### Insurance policy certificates

##### Compliance requirement

Chapters are required to provide CAMFT with copies of BOTH their General Liability (CGL) and Directors & Officers (D&O) insurance policies **upon renewal**.

##### General Liability (CGL)

CAMFT needs to be added as an additional insured to this policy

##### Directors & Officers (D&O)

CAMFT **does not** need to be added as an additional insured to this policy

##### Reminders

CAMFT staff will email chapter Presidents and Treasurers a reminder 1-2 months in advance of the expiration dates