

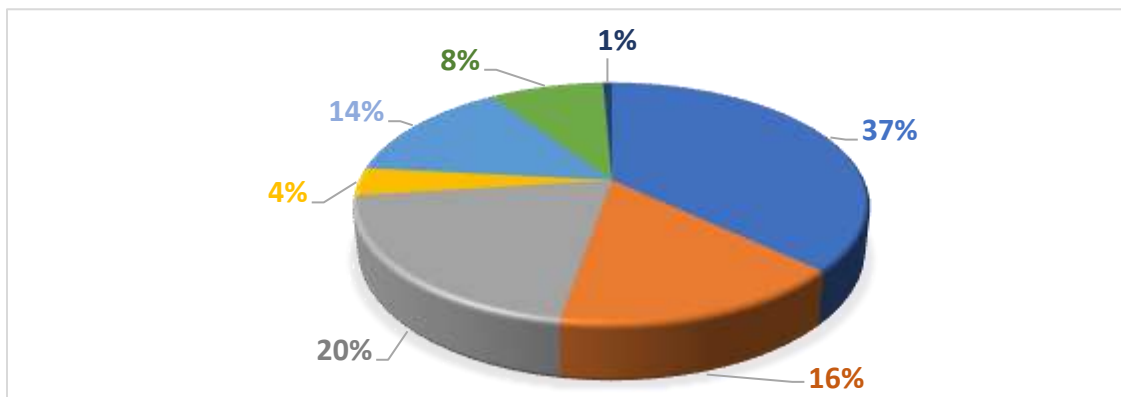
## County Finances to Support your Plans

### What's your County's 'Money Philosophy'?



- ❖ Spending
- ❖ Budgeting
- ❖ Donations
- ❖ Investments

### Where does your Money Come From? (statewide averages)



*How might the proportions differ for your county?*

### What's included in Financial Planning for the County Farm Bureau?

- Long-Term projects & Goals
- Future Plans
- Investments
- Donation policy
- Building Needs

## Does your county have a **Donation Policy**?

- ☐ Yes  
☐ No  
☐ I don't know



Developing a Donation Policy	
<b>Purpose of Donations</b> <p>Why do we donate?  How much do we want to spend?  What do we want to support?  What do we want to accomplish?</p>	<b>Process for Receiving/Reviewing Requests</b> <p>To whom should requests be submitted?  In what form &amp; when should requests be submitted?  Who will review requests (committee or full board)? Which will go to the full board?  Will all requests be publicized?  Memorials</p>
<p>✓ <i>Which of these items would be useful for your Board to discuss?</i></p>	<p>✓ <i>Which of these would streamline your Board meetings if we had a better system?</i></p>



## Does your county have an **Investment Policy**?

- ☐ Yes  
☐ No  
☐ I don't know

Developing an Investment Policy
<ul style="list-style-type: none"> <li>▶ Do we currently have investments? What type &amp; amount?</li> <li>▶ Access to financial advisor?</li> <li>▶ Committee?</li> <li>▶ Do we review? How often? Benchmarks? Rebalance?</li> <li>▶ Excess in checking/savings that could be invested? Threshold amount?</li> <li>▶ What are the goals of our investments?</li> <li>▶ Risk tolerance? Asset protection? Long-term viability?</li> </ul>
<p><i>How would your county benefit from this discussion?</i></p>