

ATLANTIC PLANNERS INSTITUTE

BRANCH ALLOCATION REQUEST FORM

Branch Name:

Year:

OUTLINE OF PROPOSED PROGRAM FOR CURRENT YEAR:

DETAILS OF ANNUAL BUDGET: (Attach Copy)

Total Estimated Revenue:

Total Estimated Expenses:

FINANCIAL SUMMARY FOR PREVIOUS YEAR: (Attach copy of financial statement)

Total Revenue:

Total Expenses:

Total Assets:

Total Liabilities:

Branch President Signature:

Date:

Authorized By:

PROCEDURES:

1. This Branch Allocation Request Form is intended to clarify the requirements and process for requesting branch allocations.
2. The form along with appropriate attachments should be submitted to the attention of the Treasurer of the Atlantic Planners Institute as early in the year as possible.

Current address:

Atlantic Planners Institute
RPO Box Churchill Square
P.O. Box 23014
St. John's, NL A1B 4J9

3. A copy of the branch's budget for the year to which the request applies and a financial statement for the previous year (can be unaudited) must be attached to the Branch Allocation Request Form.
4. The request must be signed by the branch president.
5. Requests for branch allocations will be reviewed at the next regular meeting of council.
6. When approved, the API Treasurer will authorize the release of the appropriate funds and will forward the funds to the branch. Please indicate the address to which the allocation should be forwarded.
7. Current allocation amounts are:
 - \$750.00 for each of the Newfoundland and Labrador and Prince Edward Island branches; and
 - \$15.00 for each member of the Nova Scotia and New Brunswick branches (based on total membership as of December 31st of the previous year).