

## Officer Change Forms Needed

**Officer Change/Appointment Worksheet:**

[http://gwrra.org/oconnect/pdf/OfficerChangeAppointmentFormVer11\\_2011.pdf?v=2015](http://gwrra.org/oconnect/pdf/OfficerChangeAppointmentFormVer11_2011.pdf?v=2015)

**Officer Candidate Memorandum of Understanding (MOU):**

<http://gwrra.org/oconnect/pdf/MOU-092215.pdf>

**Confidentiality Agreement of Member Information:**

<http://gwrra.org/oconnect/documents/confidentiality-agreement-member-info.pdf>

**Oath of Office: http:**

[http://www.gwrra.org/oconnect/documents/GWRRR\\_Oath\\_Of\\_Office.pdf](http://www.gwrra.org/oconnect/documents/GWRRR_Oath_Of_Office.pdf)

**Bank Information & Staff Signatures:**

[http://www.gwrra.org/oconnect/documents/I-16\\_Bank\\_Info.pdf](http://www.gwrra.org/oconnect/documents/I-16_Bank_Info.pdf)

**Change of Address (IRS 8822-B Form):**

<http://gwrra.org/oconnect/pdf/8822-B.pdf>

### **Instructions for Completing Officer Change Forms**

- Officer Change/Appointment Worksheet **MUST** be filled out on the computer, saved, and then sent it to your Assistant District Director as an attachment in an e-mail. All other forms should be mailed as hard copies to your ADD.
- The MOU and the IRS 8822B Form **MUST** be filled out on the computer, then printed and signed.

Please type or use black ink for completing all Officer Change Forms and all Financial Forms.

## Officer Change/Appointment Worksheet:

“Retiring Officer”: If the officer is taking on another officer position, on the “Title Line”: indicate what will be his/her new position. If the officer is not taking on another position, complete as indicated.

“Position Appointed To”: Click in the area of the box that corresponds with the position you are accepting. A mark will appear in that box.

“Chapter”: Only use for chapter appointments. Do not list a chapter for a District officer’s position.

“District”: should be entered as Pennsylvania.

“Region”: should be entered as Northeast Region B.

“Personal Information”: Please fill in the blanks with your information.

“**Exp. Date**”: Officer’s GWRRA membership must be current through the term in office. Since there is no tenure, officer’s membership must be current through the consecutive years he/she is volunteering. In most cases that will be through December 31st of the year in which you take office, presuming you are appointed on January 1<sup>st</sup>. Otherwise, your term is one year from your date of appointment.

“Appointment Date”: That is the date the retiring officer is no longer serving in his/her position. Should always be the last day of the month.

“Effective Date”: This is not the date that you are filling out the application. For new officers the date should be January 1st. If you are a new officer coming on board during the year the appointment date should always be the 1st of the month.

### “Appointing Officer”: Signature Area.

- For CD’s the appointing officer is the District Director. The concurring officer is the Region Director.
- For ACD’s the appointing officer is the Chapter Director. The concurring officer is the District Director.
- For Chapter Treasurer’s the appointing officer is the Chapter Director. The concurring officer is the District Treasurer.
- For Chapter Membership Enhancement Coordinators the appointing officer is the District MEC. The concurring officer is the Chapter Director.

**ALL APPOINTMENT WORKSHEETS AND MOU’S MUST BE SENT TO THE DISTRICT DIRECTOR. HE/SHE WILL**

**DISTRIBUTE THEM TO THE OFFICERS THAT NEED THEM.**

Memorandum of Understanding (MOU):

**This form is to be filled out by the “Applicant”**

Unless the change is taking place in the middle of the year then the date should be the 1<sup>st</sup> day of January of the year.

Probation period is 6 months from the date the MOU was made.

Please complete the “Officer Candidate” information on the second page. Print and sign your name.

The “**Appointing Officer**” is:

- For Chapter Director it is the District Director.
- For ACD it is the Chapter Director.
- For the Chapter Treasurer it is the Chapter Director.
- For the Chapter MEC it is the District MEC.

Confidentiality Agreement of Member Information:

**This form is to be filled out by the Applicant and Co-Applicant.**

Unless the change is taking place in the middle of the year then the date should be the 1<sup>st</sup> day of January of the year.

Print and sign both names.

Oath of Office:

Please read the “Oath of Office” and sign at the bottom acknowledging that you have read and understood the “Oath of Office”.

The “**Appointing Officer**” is:

- For Chapter Director it is the District Director.
- For ACD it is the Chapter Director.
- For the Chapter Treasurer it is the Chapter Director.
- For the Chapter MEC it is the District MEC.

Bank Information and Staff Signatures:

**Complete the form and send with the officer change paperwork. District will forward it to the home office.**

If there is a change in officers (Chapter Director, Assistant Chapter Director, Chapter Treasurer or the District Director) then the “Bank Information & Staff Signatures” form must be filled out.

Date should be the 1<sup>st</sup> of January or if there has been a change in officers during the year the date should be the 1<sup>st</sup> of the month that the new officer started. Be sure to fill out all of the information at the top of the form.

(Area # 1) Information should be the Chapter Director.

(Area # 2) Information should be the Assistant Chapter Director or if no assistant then the Chapter Educator can be the second signature.

(Area # 3) Information should be the Chapter Treasurer.

(Area # 4) Information should be that of the current District Director.

**Please make sure everyone signs the form in the appropriate spot for each position.**

IRS Form 8822B; Change of Address:

This is a new updated form from the IRS for 2012. It is easier than the old standard 8822. It should be filled out on the computer and then PRINTED.

- If you are a tax-exempt organization (see instructions), check here. Needs to be checked
- #1 Employment, excise, income, and other business returns (Forms 720, 940, 941, 990, 1041, 1065, 1120, etc.) Needs to be checked.
- # 3 Business location needs to be checked.
- # 4a. Business Name: The Business Name should read Pennsylvania Chapter -“Your Chapter Letter”. Since Chapters, Districts and Regions are affiliates of GWRRA and are separate from GWRRA; do not use the name Gold Wing Road Rider Association on the application.
- #4b. Enter the Chapter’s Employer Identification Number
- #5. Enter **OUTGOING** Chapter Directors address. Leave Foreign country area blank
- #6. Enter **NEW** Chapter Directors address. Leave Foreign country area blank.
- #7 Leave Blank
- #8a Fill in with the name of the **OUTGOING** Chapter Director.
- #8b Fill in with the name of the **NEW** Chapter Director.
- #9a Enter the Social Security number of the **OUTGOING** Chapter Director.

- #9b Enter the Social Security number of the **NEW** Chapter Director.
- #10 Enter the daytime phone number of person to contact. Sign and date along with your title.

**Make a copy of this form for your file. Send the ORIGINAL to the District Director. He/She will send ALL forms to the IRS in one package.**