

Officer Change Forms Needed

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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 8822 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 1st. 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 1st 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 only to be filled out by the “Co-Applicant”. Unless the change is taking place in the middle of the year then the date should be the 1st day of January of the year.

Print and sign your name.

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 1st of January or if there has been a change in officers during the year the date should be the 1st 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.

IRS Form 8822; Change of Address:

(a) Part I of this form is **NOT** to be completed.

(b) Part II of this form is to be completed when the office of Chapter Director or District Director is taking place.

- # 10 Business location needs to be checked.
- # 11a. 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.
- #11b. Enter the Chapter’s Employer Identification Number
- #12. Enter out going Chapter Directors address with his/her name.
- #13. Enter name and new Chapter Directors address.
- #14. Leave Blank

(c) Part III. **Where the form asks to “sign here” be sure to sign on the lines on the right side of the form.** Place the 1st of January as the date unless the change takes place during the year then use the 1st of the month that the officers are changing.