

# Financial Management Policy Sample Form

## Organization Information

Organization Name

Policy Effective Date

Last Revision Date

## Policy Purpose

Describe the purpose of this financial management policy

## Scope

Who and what does this policy apply to?

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### 1. Budgeting

Outline budgeting procedures, approval process, timeline, etc.

### 2. Expenditure Authorization

Define who is authorized to approve expenditures and limits

### 3. Financial Reporting

Describe reporting requirements, frequency, recipients

## **4. Asset Management**

Policies for acquiring, managing, and disposing of assets

## **5. Record Keeping**

Describe how financial records will be maintained and for how long

## **6. Internal Controls**

Outline procedures for internal controls and checks

## **7. Review & Amendment**

How often is this policy reviewed and by whom?

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## **Approvals**

Approved By

Approval Date