

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?

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?

Approvals

Approved By

Approval Date