

Organizational Finance Strategy Policy Form

Organization Name

Policy Title

Effective Date

Policy Version

1. POLICY OVERVIEW

Brief summary of the financial strategy policy

2. PURPOSE & OBJECTIVES

Purpose of this policy

Key financial objectives

3. SCOPE

Who and what does this policy cover?

4. FINANCIAL STRATEGY

Key Funding Sources

Investment Approach

Risk Management Strategies

Budget Planning & Forecasting

5. ROLES AND RESPONSIBILITIES

Key personnel and their responsibilities

6. MONITORING & REVIEW

How will policy compliance and effectiveness be monitored and reviewed?

7. APPROVAL & AMENDMENT

Approval process and authority

Policy amendment procedure