

**IDAHO ASSOCIATION OF HEALTH UNDERWRITERS  
POLICY & PROCEDURES**

<b>POLICY TITLE:</b>	IAHU Annual tax filing policy
<b>CLASSIFICATION:</b>	Finance
<b>POLICY NUMBER:</b>	10-12F
<b>MOTION:</b>	David Wilcox
<b>SECONDED:</b>	Rhonda Bartholomew
<b>DATE APPROVED:</b>	July 2020
<b>SUNSET DATE:</b>	2023

**PURPOSE:** To ensure that the IAHU Board fulfills the association's tax obligations each year.

**POLICY:**

**1.** That the Treasurer shall direct the Executive Assistant to inform the IAHU contracted accounting firm which performs the annual audit/tax return in August of each year to complete the required tax forms and to file the tax return. To also copy the President and Treasurer on the results of the annual audit/tax return and any related correspondence from the contracted accounting firm.

**2.** That the results of the annual audit/tax return and the any related correspondence from the contracted accounting firm shall be presented to the Board of Trustees by the Treasurer.

**FINANCIAL IMPACT:** Costs for completing and filing annual tax return will be budgeted by Board in the annual budget.

\_\_\_\_\_  
Date

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Attested by Secretary