



TIGER TIPS: CLASS TREASURERS' FORUM

THE BASICS AND BEYOND -
SHARING IDEAS ON OUR CORE
RESPONSIBILITIES AND POTENTIAL
CONTRIBUTIONS AS TREASURERS -
PART 1

Presented by Chuck Brown '02, Andrew Lewis '12,
and Matthew Morgan '85

April 1, 2026



Agenda

- Introductions
- Treasurer responsibilities & best practices
- Hot topics & discussion
- Conclusion & thanks

Class Affairs Committee (CAC)

Mission is to support class officers in building class community, provide guidance on best practices, troubleshoot issues and to serve as a liaison between classes and the University.

CAC works closely with the Alumni Engagement staff and class officers to provide useful resources to class leadership.

Class Liaisons:

- Each class is assigned a liaison within the CAC.
- Your liaison can assist you with any specific class issues, provide fresh ideas for class engagement and can share best practices.



Class Affairs Committee (CAC)

FY 2025-2026



Anthony Pappenfus '13
Chair
Class President



Victoria Scott '18
Vice Chair
Class President



Charles Brown, Jr. '02
Class Treasurer



Christienne Coates '89
Class President



**Julianna Yasinski
Edwards '92**
Class President



Olga Lara '81
Class Secretary



Matthew Morgan '85
Class Treasurer



Kat Giordano '18
Class Secretary



Emily Trieu '23
Class Vice President



Emily Walling '99
Class Vice President



Minna Abdella '26
Senior Class President

Meet the Class Affairs Team



Cathy Phillips h93 h02 h12 h20

Associate Director, Class Affairs

609-258-9573

cathyphillips@princeton.edu



Dottie Werner h22 h27 h30 h32 h33 h35 h36 h37 h38 h40

h41 h43 h44 h45 h46 h47 h48 h49 h50 h52 h54 h55 h56 h57 h58 h59

h60 h62 h64 h65 h68 h71 h72 h73 h78 h79 h84 h86 h87 h89 h93

Coordinator, Class Affairs

609-258-5451

tigerdot@princeton.edu

Class Affairs Email: classaff@princeton.edu

Treasurer Responsibilities & Best Practices



Treasurer

The Treasurer is responsible for the diligent management of class finances, ensuring the financial health and sustainability of class operations. Their role involves **budgeting**, financial **reporting**, and **collecting dues** to support class initiatives effectively.

Treasurer Responsibilities:

Manage Finances: Supervise class finances, ensuring stability through meticulous management of revenue and expenses. Develop and adhere to a budget to support class initiatives.

Collect Dues: Solicit class dues via the annual Treasurer's letter and other class outreach, ensuring timely and consistent collection.

Maintain Records: Keep accurate financial records, including dues payments logs. Prepare and submit an annual financial report to the University.

Manage Bank Accounts: Oversee class bank accounts, ensuring funds are securely held and appropriately utilized.

Ensure Compliance: Ensure class adherence to policies and regulations to maintain tax-exempt status and financial standing.

**DUES LEDGERS
COMING LATE JULY!**

Best Practices

- Know the difference - Class Dues vs. Annual Giving vs. Reunions
- Separate accounts for class dues and Reunions
- Backup class officer with access to the class account in case of emergencies
- Awareness of reporting timelines and timely response for annual reporting
- Know who key points of contact are
- Please share your own!

Hot Topics

Bank Home Satisfaction

General Banking Guidelines:

- Class officers may select any bank.
- At least two class officers should have access to each account.
- Setting up an account requires:
 - Your Class' IRS tax exempt letter with EIN
 - Class charter / constitution
 - Meeting minutes
 - Identification

Investment of Class Funds

- The University does not provide guidance in this area
- Several classes have experiences that may be helpful
- Everyone is welcome to share their experiences

Thank You!
Tiger Cheers!

