

## 1.) Pass-Through Contributions Accounting Guidance

- Please see attached Diocesan Guidance on Best Practices - Pass-Through Contributions Accounting. As discussed at Biz Exchange Meeting. Also on Google Sites - Finance Office Page

## 2.) Bishop's Decree on Rectory Policy

- Per discussion and request at the Biz Exchange Meeting, please see the attached Bishop's Decree on Rectory Policy that Tim McGuire reviewed with us at the meeting.

## 3.) **ACTION REQUIRED: PDS ON-SITE TRAINING: 3/18/20**

- Please e-mail me if you CAN or CAN'T make the date of 3/18/20 work for PDS ledger training at the Catholic Center. [E-MAIL BY 2/5/20](#)

## 4.) **ACTION REQUIRED: CPC Shortfall "Budget" Billing**

- Per discussion at Biz Exchange meeting, please e-mail Rhonda Weis if you [DON'T](#) want to have a monthly invoice for estimated CPC shortfall. [E-MAIL BY 2/5/20](#)

## 5.) **Close, Sync, Upload Financials through 12/31/19.**

Please close, upload, & sync 12/31/19 as soon as possible.

## 6.) **1.28.20 Biz Exchange Recap**

- The meeting Recap and copy of the presentation deck coming soon!