

2026 APFFPA Financial Trustee Roles and Responsibilities

APFFPA Financial Trustee Roles and Responsibilities



Version	Approved By	Revision Date	Author(s)
1.0	APFFPA Executive Board		APFFPA Principal Officers

Purpose

The purpose of this policy is to outline the roles and responsibilities of the APFFPA's Financial Trustee ensuring a comprehensive approach to managing WCB processes, Presumptive Cancer Coverage, and collaborative efforts with the APFFPA executive, affiliates, and committees

Scope

The policy is applicable to activities and responsibilities within Alberta and the Northwest Territories, where the APFFPA operates.

This policy directly involves and is applicable to the following stakeholders: APFFPA's Financial Trustee

- APFFPA Executive Team
- APFFPA Affiliates
- IAFF (International Association of Fire Fighters)
- APFFPA Bookkeeper & Executive Assistant

Policy Statement

Financial Trustees are entrusted with safeguarding the Association's financial integrity through regular reviews, audits, and reporting. They serve as independent overseers of fiscal operations while maintaining strict confidentiality and neutrality.

Section 1 Financial Oversight & Audits:

The Financial Trustees shall conduct thorough examinations of the APFFPA's books at least twice annually, with additional reviews performed as deemed necessary. They retain full access to all financial records maintained by the Secretary-Treasurer. Upon completing each review, the Trustees must submit a detailed report of their findings to the Executive Board and Convention delegates.

The Trustees are responsible for delivering the prior year's financial records to a qualified firm to facilitate a Notice to Reader or review engagement. They must present the results of this audit at the Annual Spring Convention.

Section 2 Quarterly & Annual Reviews:

The Financial Trustees shall meet quarterly with the Secretary-Treasurer to analyze Budget vs. Actual expenditures, ensuring alignment with fiscal plans. Following the fiscal year-end, they must convene with the Secretary-Treasurer and Bookkeeper to review annual financial statements and supplementary reports.

Section 3 Confidentiality:

The APFFPA Trustee shall treat all information and matters as it pertains to their position with the utmost confidentiality, in compliance with organizational policies and procedures.
As such, a confidentiality agreement must be signed by the Financial Trustee before they can act in the role.

Section 4 Role Limitation:

The Financial Trustees do not direct operational decisions of the APFFPA Executive Board.

Section 5 Performance Evaluation:

The performance of the Trustees is evaluated periodically by the APFFPA Secretary-Treasurer or their designate. The evaluation includes an assessment of adherence to roles and responsibilities, effectiveness in communication, contribution to organizational goals, and timeliness in meeting tasks described within the APFFPA’s CBL, Blue Book, or assigned by the Principal Officers of the APFFPA.

Section 6 Support for Affiliates:

Ensures a higher degree of oversight in the spending of affiliates per capita.

Section 7 Continuous Education and Improvement:

- Retain awareness of APFFPA objectives and the costs to achieve them.
- Learn how other provincial IAFF associations “audit” their fiscal years.
- Understand the varying degrees of audits available to the APFFPA.

Reporting structure

The APFFPA’s Trustee reports directly to the APFFPA Secretary-Treasurer or a designate appointed by the APFFPA Secretary-Treasurer.

Roles & Responsibilities

Role & Responsibility

The APFFPA’s Financial Trustee is entrusted with the following key responsibilities:

6.3 - FINANCIAL TRUSTEES -

Provide a bullet point list of the responsibilities and duties of the Financial Trustees.

- Meet with the APFFPA’s Secretary-Treasurer on a quarterly basis to review each quarter’s Budget vs Actual expenditures.
- Meet with the APFFPA’s Secretary-Treasurer and Bookkeeper following fiscal year end to review the year-end Budget vs Actual expenditures, financial records, and any additional reports generated by the Bookkeeper.
- Conduct an internal audit of the APFFPA finances in accordance with the APFFPA Constitution & By-Laws and the processes outlined within the APFFPA Blue Book.
- Review the books, financial records, and supporting documentation of the APFFPA at least twice annually, and at such other times as directed by the President or deemed advisable by the Trustees.
- Maintain full access to all books and records pertaining to the financial matters of the APFFPA for the purpose of conducting examinations and internal financial reviews.
- Prepare and present written reports outlining the findings of the internal audit and financial examinations to the Executive Board and delegates at Convention.

- Provide recommendations regarding the financial position, practices, controls, or procedures of the APFFPA where appropriate.

Approval & Review

This policy will undergo periodic reviews to ensure its continued relevance and effectiveness. The APFFPA Financial Trustee is accountable for implementing and adhering to the roles and responsibilities outlined in this policy.

Name	Title	Date of Review
Elliott Davis	APFFPA President	May 2026
Dan Henschel	APFFPA EVP	May 2026
Cole Chapelsky	APFFPA Secretary Treasurer	May 2026