



ONTARIO COMMAND

ANNUAL BRANCH INSPECTION REPORT

DISTRICT/ZONE _____ BRANCH NO: _____ DATE OF VISIT: _____

ASSISTANCE REQUIRED? YES NO If yes state reasons in Zone Commander comments

INSPECTION OCCURED AT: General Meeting Executive Meeting Other

BRANCH OPERATION

1. Are Branch Premises Owned Leased
2. Are Renovations planned? If yes give details in Zone Commander comments
3. Insurance Company Name: _____ Policy# _____
Expiry Date: _____ (attach copy of coverages page)
4. Directors and Officers Liability Insurance - (separate Policy) Expiry Date: _____
5. Municipal Tax Exemption Yes No Expiry Date: _____
6. Education Tax Exemption Yes No Expiry Date: _____
7. Liquor Licence Yes No Expiry Date: _____
8. Per Capita Tax paid up to date Yes No
9. Does Branch receive lease income Yes No If yes – monthly amount \$ _____
10. Does Branch have a Ladies Auxiliary Yes No If yes is relationship good? _____

BRANCH GOVERNANCE

11. Branch Regulations Yes No Date last certified: _____
12. Term of Office 1 year 2 years
13. Are all Standing Committee Chairmanships filled? Yes No. Explain in Zone Commanders' comments
14. Did you examine the Minute Books for General and Executive Meetings Yes No
Explain why not

15. Are Minutes signed and motions properly recorded Yes No
16. Was Meeting conducted according to Legion procedures Yes No
Comments:

BRANCH FINANCES

17. *Did you receive copies of the required Year-End Financial Statements Yes No
18. *Were financial statements certified by the Financial Review Committee Yes No
19. Is a physical inventory done at least monthly Yes No If not, explain
20. How often does the Branch Financial Review Committee meet?
21. General Account Bank Balance as at May 31st Year End \$
22. General Account Bank Balance at time of visit: \$
23. How often are Bank reconciliations done? By whom?
24. *Attach copies of current year-to-date Financial Statements to month end prior to visit
Balance Sheet and Income & Expense (P&L) All Branch accounts except Poppy
25. Is a monthly financial statement made available to members Yes No verbal printed
26. Are expenditures approved by the membership according to Branch Regulations Yes No
27. Does the branch have financial investments? Yes No
State investment amount(s)
28. Petty Cash Amount \$ Bar floats amount \$

LIABILITIES

29. Total Accounts payable amount at time of visit \$
30. Monthly mortgage amount if applicable \$
31. Active Line of Credit Yes No amount owing \$
32. Loans payable Yes No amount owing \$
33. Does the Branch have any long-term debts Yes No If yes state total amount \$

ZONE COMMANDER'S COMMENTS (please attach separate sheet if needed)

Signature

Date sent to District Commander

If Branch requires Advisory Assistance send copy to District Commander and Ontario Command as soon as completed.

DISTRICT COMMANDER'S COMMENTS (please attach separate sheet if needed)

Signature

Date sent to Ontario Command

Send Copy to Branch Secretary after Zone and District Commander comments completed and include reasons for Advisory Assistance recommended if applicable.

*** Copies required to be submitted with this report**