Officer Handoff Checklist — _____

Office: Chair / Treasurer / Clerk or Secretary / Other: _____
Outgoing: _____ **Incoming:** _____
Elected or appointed on: _____ (minutes of the meeting held _____)
Handoff completed by: _____

1. Authority

- ☐ Minutes showing the vote or appointment are approved and filed.
- ☐ Bylaws, articles and current policies handed over (or the shared folder link): _____

2. Money (treasurer, and anyone who signs)

- ☐ Bank: board vote naming new signers delivered to the bank; old signers removed. Bank: _____ Date: _____
- ☐ Two-person approval rule for payments above _____ explained.
- ☐ Debit or credit cards cancelled or reissued.
- ☐ Payment apps, payroll and online donation accounts: owner changed.
- ☐ Last bank reconciliation, budget and treasurer's report handed over.
- ☐ Restricted gifts and grant balances listed, with the grant agreements.

3. Records (clerk or secretary)

- ☐ Minute book, signed written consents and the conflict-disclosure forms.
- ☐ Member or director roster with term end dates.
- ☐ For public bodies: the notice file, executive-session minutes and the public records request log.

4. Logins and keys

- ☐ Email, website, domain, shared drive and social accounts: recovery email and phone moved to the incoming officer or a board account — not a personal one.
- ☐ Physical keys, mail key, safe deposit box.

5. Filings and deadlines

- ☐ Annual board calendar reviewed together; next three deadlines: _____
- ☐ Secretary of State and charity regulator records updated with new officers where the form requires it: _____
- ☐ Insurance (including directors' and officers' coverage), contracts and leases: renewal dates and who to call.

6. Open commitments

Commitment	Who to contact	Due
_____	_____	_____
_____	_____	_____

Sign-off

Everything above has been handed over, or is listed as open.

Outgoing: _____ **Date:** _____

Incoming: _____ Date: _____
Chair or board witness: _____

State notes

- **Maine:** Maine nonprofit annual reports are due June 1. Check whether the report asks for current officers and directors, and update it after the handoff.
- **New Hampshire:** New Hampshire nonprofits file a report with the Secretary of State every five years, and charities file annual reports with the Charitable Trusts Unit. Check which of these list officers, and update them.
- **Massachusetts:** Massachusetts nonprofit annual reports go to the Secretary of the Commonwealth by November 1, and Form PC goes to the Attorney General. Check whether each lists officers, and update them after the handoff.

Sources

- 29-250 C.M.R. ch. 260, § 3 (Maine nonprofit annual reports, due June 1) — https://www.law.cornell.edu/regulations/maine/29-250-C-M-R-ch-260-SS-3
- RSA 292:25 (nonprofit return every 5 years; $25 fee) — https://www.gc.nh.gov/rsa/html/XXVII/292/292-25.htm
- RSA 7:28 (charitable trust registration and annual reports; GAAP statements at $500,000; audit at $2,000,000) — https://www.gc.nh.gov/rsa/html/I/7/7-28.htm
- M.G.L. c. 180, § 26A (nonprofit annual report to the Secretary, on or before November 1) — https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXXII/Chapter180/Section26A
- M.G.L. c. 12, § 8F (public charity annual report; fees; audit and review thresholds) — https://www.mass.gov/info-details/mass-general-laws-c12-ss-8f

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