

ACCOUNTING SERVICES

Whistleblower Policy Did you know the Archdiocese has in place a Whistleblower Policy? We have recently established the Whistleblower Policy to assist us in ensuring the funds we receive will benefit the people we serve and to protect our financial and physical assets from misuse. The policy which is located at <http://www.archindy.org/finance/parish/forms.html> describes the types of misuse and reportable conditions as well as how incidents can be reported. Beginning **April 1, 2009**, EthicsPoint Hotline, an independent company, will be enabled that allows concerns to be anonymously reported via a telephone call (1-888-393-6810) or via the internet by simply visiting the following website: www.archdioceseofindianapolis.ethicspoint.com.

We also encourage the policy to be posted around the parish, school and agency in places where employees and members gather.

2009 FMDC Conference The 2009 Fiscal Management and Discipleship Conference will be held on **Thursday, June 11th** at the Benedict Inn Retreat and Conference Center. Conference fee for registration is \$35 per person, early bird fee is \$30 per person if payment is received on or before May 10, 2009; lunch is included in both fees. All payments and registration forms must be received by **June 6, 2009**. Registration for this event will be available in a few days by visiting the FMDC website at <http://www.archindy.org/fmdc>. Please remember to mark your calendars for this exciting and informative event.

2009-2010 Budget Guidelines The 2009-2010 Budget guidelines are now available online at www.archindy.org/finance/parish/guidelines The budgets may be mailed, e-mailed or faxed and are due by **June 15, 2009** to the Office of Accounting Services. If you have any questions or require assistance with budget preparation, please contact the Office of Accounting Services at our email accountingservices@archindy.org.

Rental Car Provider The Archdiocese has recently contracted with Enterprise Rent-A-Car to be a new preferred rental car supplier for the Archdiocese of Indianapolis. This change provides significant savings in rental rates, and provides Archdiocese travelers with special recognition, service and speed. We encourage all employees of the Archdiocese to utilize this program when traveling locally distances in excess of 150 miles roundtrip; we have pre-arranged costs of \$50.99 per day rental rate for a standard size vehicle. The program is simple to use and easy to make reservations on-line. Please check out our website <http://www.archindy.org/finance/parish/forms.html> for instructions and frequently asked questions. If you have additional questions please contact us at accountingservices@archindy.org.

Budget Help In these tough economic times we must look at what is critical to our mission, our core ministries and programs. This year, more than any recently, we need to review our budgets from the bottom up; and determine what is absolutely core. If you need help in this area please contact Mike Witka, Director of Parish Financial Services and Risk Management, for an appointment at mwitka@archindy.org or call at (317) 236-1558.

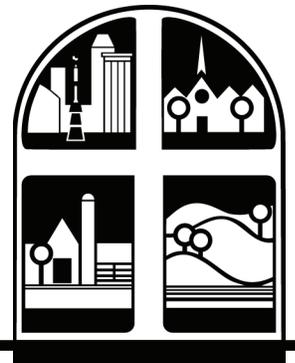
ADLF Rates for April–June 2009

Loans 3.75% Deposits 1.0%

ADLF rates for April- June are unchanged from the previous quarter. If you have any questions please contact the Office of Accounting Services at our email accountingservices@archindy.org.

Charitable Contribution Deduction When preparing to file your federal tax return, don't forget your contributions to charitable organizations. Your donations could add up to a sizeable tax deduction if you itemize on IRS Form 1040, Schedule A. For top ten ways to ensure a beneficial pay off to your contributions, please visit the IRS website at <http://www.irs.gov/newsroom/article/0..id=106990.00>.

Please feel free to send these newsletters to your fellow co-workers who normally would not receive through Accounting Services. There is always valuable information that can be shared throughout your parish or agency.



HUMAN RESOURCES

2010 Health Plan Information We are pleased to announce that your costs for our medical and dental plans will not increase in 2010. There will be no change to premiums, deductibles and out-of-pocket maximums between January 1 and December 31, 2010. Archdiocesan deposits to health savings accounts in 2010 will also continue at the current rate of \$100 per month for single coverage and \$200 per month for family coverage.

In the current recession, we know that it is important to keep your share of health care costs from rising, especially since salaries and wages are not increasing in 2009. Many employers and employees across the country are still facing double digit increases in health care costs, but the costs in our self-funded plan with Anthem are holding steady. For more information please contact Andrew DeCrane at adecrane@archindy.org.

Q & A

Q. What does Form 1099-SA report?

A. Teacher's Credit Union administers our Health Savings Accounts and provides this form. It is used to report distributions from each HSA. A full explanation of the form and reported amounts is printed on the back of the form. The Archdiocese does not have control over this form or its contents. Please contact TCU with any questions, replacement copies, etc.

Teacher's Credit Union
(574) 284-6247
(800) 552-4745

Access their website for nearby branches and other information. www.tcunet.com Because this form reports activity that occurred during the 2008 calendar year, Teacher's Credit Union should have provided the 2008 form by February 2, 2009.

Q. What does Form 5498-SA report?

A. This is another form provided by our HSA administrator, Teacher's Credit Union. It is used to report contributions to each HSA other than contributions made through Archdiocese paycheck deductions. A full explanation of the form and reported amounts is printed on the back of the form. The Archdiocese does not have control over this form or its contents. Please contact TCU with any questions, replacement copies, etc.

Because this form reports activity that occurred through April 15, 2009, Teacher's Credit Union should provide the 2008 form by June 1, 2009.

Q. How long can I typically expect a request for funds, via an ADLF withdrawal or deposit via ACH, to take?

A. Normally, if a request is faxed in prior to 4 o'clock, Monday through Thursday, you can expect a next business day turn around. Also, we have updated our ADLF Withdrawal request form. You can locate the new form online at <http://www.archindy.org/finance/parish/forms> and remember to keep faxing your requests to our ADLF fax number 317-592-4035

Send us your questions! Each month one or two questions will be addressed based on inquiries of the parishes.
Please submit any questions you would like answered to accountingservices@archindy.org.