

REQUIRED REPORTS AND COKESBURY FORMS FOR CHARGE CONFERENCE

All forms are accessible from: <https://ntcumc.org/connectional-resources/charge-conference>

Check List:

- _____ 1. **Report of the Pastor** (Cokesbury form - available online [here](#))
Please include in your written report goals you completed in 2023 and 3-5 goals for 2024.
- _____ 2. **Pastor's Continuing Formation Report** – supplement to pastor's report - [here](#)
- _____ 3. **2024 Ministerial Compensation Report & UMPIP Worksheet**
(To be completed online [here](#) – see **Clergy Compensation Package Instructions**)
- _____ 4. **Report of the Committee on Finance** (Cokesbury form - available online [here](#))
(**This should include both the 2024 budget and a current 2023 operating statement.**)
- _____ 5. **Fund Balance Report** (formerly known as the Report of the Annual Audit – online [here](#))
[Please note: **This is a report of the 2022 calendar year finances, not year-to-date 2023.** Please respond to questions 2 and 3 of this report. See included Local Church Audit Guide to complete this item. Also, refer to 2016 BoD ¶258.4d.]
- _____ 6. **Report of the Committee on Lay Leadership (Nominations)**
- _____ 7. **Annual Report of the Trustees including the Accessibility Audit**
(Cokesbury forms - available online: [Trustees](#), [Accessibility Audit](#))
- _____ 8. **Clergy Housing Report** (available online [here](#))
- _____ 9. **Accountable Reimbursement Policy - Short Form**
(if applicable to your situation – available [here](#))
- _____ 10. **Local Church Leadership Roster** - (to be completed online [here](#))
- _____ 11. **Report/Application of the Lay Servant** (available online [here](#))
(**BE SURE TO READ THE INSTRUCTIONS CAREFULLY**)
- _____ 12. **Retired Clergy Form** (available online [here](#))
- _____ 13. **A current copy of the membership roll.**
- _____ 14. **Equitable Salary Request** (supplied by the District Office as needed).
- _____ 15. **Health Insurance or Pension Supplement forms**
(supplied by the District Office as needed)
- _____ 16. **List of those present and Minutes following Charge Conference** (No form)

All forms are to be completed & submitted at least one week before the date of your Charge Conference.