

UW-Madison School of Business  
Student Organization Office

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## Financial Summary

The purpose of the financial summary is to provide the School of Business an overview and a detailed account of how each student organization spends money. Please complete the financial summary with attention to detail and thoroughness at the end of each semester. Please return it to the Student Organization Office in Grainger Hall, Room 1250B. If you need help or have any questions, please contact Amy Climer at [aclimer@bus.wisc.edu](mailto:aclimer@bus.wisc.edu) or 262-8676.

**Student organization name** \_\_\_\_\_

Summary is for  Summer & Fall semester 200\_\_ OR  Spring semester 200\_\_

Financial Institution for checking account \_\_\_\_\_  
account number \_\_\_\_\_ balance \$ \_\_\_\_\_ as of (date) \_\_\_\_\_

Financial Institution for savings account \_\_\_\_\_  
account number \_\_\_\_\_ balance \$ \_\_\_\_\_ as of (date) \_\_\_\_\_

Individuals authorized to access accounts for the semester checked above:

Name \_\_\_\_\_ email \_\_\_\_\_ phone \_\_\_\_\_  
Name \_\_\_\_\_ email \_\_\_\_\_ phone \_\_\_\_\_

Individuals authorized to access accounts for the next semester (if different from above):

Name \_\_\_\_\_ email \_\_\_\_\_ phone \_\_\_\_\_  
Name \_\_\_\_\_ email \_\_\_\_\_ phone \_\_\_\_\_

Have you changed the names with the financial institution? Yes No N/A

*Please attach:*

- Copies of your bank statements for the semester checked above.
- Itemized spreadsheet listing your income and expenses for the semester. Include notes to explain items as needed. See the sample template at <http://www.bus.wisc.edu/students/leaders/onlineforms.asp>

Report completed by \_\_\_\_\_ position \_\_\_\_\_ email \_\_\_\_\_

The information provided in this report is accurate. I understand providing false information will jeopardize the above named student organization's standing with the School of Business.

Signature \_\_\_\_\_ date \_\_\_\_\_

Advisor's signature \_\_\_\_\_ date \_\_\_\_\_