

**NATIONAL ASSOCIATION OF BENEFITS & INSURANCE PROFESSIONALS  
OHIO CHAPTER | POLICY AND PROCEDURE**

POLICY TITLE: Local Chapter expense reimbursement policy  
CLASSIFICATION: Board/Finance  
POLICY NUMBER: 2010/1101  
DATE SUBMITTED (INITIAL): 11/18/2010  
DATE APPROVED: 11/18/2010  
MOTION: Chris Heiberger  
SECONDED: Steve Brubaker  
APPROVED: Board

RENEWED: November 2012  
MOTION: Dave Kross  
SECONDED: Sam Fiorentino  
APPROVED BY: Board of Directors

RENEWED: September 2014  
MOTION: Sam Fiorentino  
SECONDED: Larry Link  
APPROVED BY: Board of Directors  
SUNSET DATE: September 2016  
SEND TO COMMITTEE: August 2016

RENEWED: September 2016  
MOTION: Lee Nathans  
SECONDED: Dave Kross  
APPROVED BY: Board of Directors  
SUNSET DATE: September 2018  
SEND TO COMMITTEE: August 2018

RENEWED: March 12, 2019  
MOTION: Carol Conway  
SECONDED: Ingrid Martin  
SUNSET DATE: March 2023

RENEWED: January 19, 2023  
MOTION: Andrew Toppin  
SECONDED: Barb Gerken  
SUNSET DATE: March 2025

**Purpose:** To define the policies for reimbursement of expenses by members of the local chapters of NABIP Ohio who incur expenses in the valid course of representing their local chapters of NABIP Ohio. Reimbursement will be determined by the NABIP Ohio board. Each local chapter member is reminded that NABIP Ohio's image can be best served by the use of restraint rather than extravagance in spending the Association's (and therefore the members') money.

**Policy:**

1. All expense requests must be submitted within 60 days of event, using the standard NABIP Ohio expense Reimbursement Form must include dates and business purpose of all travel.
2. Itemized receipts are required for all registration expenses.
  - a. **The method of payment.** When paid in cash, the receipt must indicate "cash." When paid by check, include the check number, the date of the check, and the name of the bank the check was drawn on. If a credit card was used, the original vendor receipt indicating "credit card/Visa/MC/etc." must be provided. Personal credit card receipts or statements are not considered an acceptable receipt.
3. **Duties of the Local Association**
  - a. The Local Association must be knowledgeable and familiar with NABIP Ohio Expense Reimbursement Policy.
  - b. The affected local individual will be given a copy of the NABIP Ohio Reimbursement policy so that requests for reimbursement will be made in accord with this NABIP Ohio policy. Reimbursement policy can be found on the ohioahu.org website.
  - c. The Local Association must gather all Expense Reimbursement forms and receipts from attendees and review, approve if appropriate and submit them to NABIP Ohio for reimbursement of the approved expenses: (checks payable to Local not individuals).
  - d. The Local Association is responsible to ensure the presence of their members at the venue and appropriate functions for reimbursement to occur.
4. **Expense Submission Review.** The NABIP Ohio President and Secretary / Treasurer will be responsible for implementation and administration of this policy. Any questionable expense will be reviewed by the NABIP Ohio Executive Committee for determination of approval.

Financial Impact will be determined annually at the budget meeting.