NEW County Chairman's Checklist

This is a generic checklist to ensure that all applicable information is transferred to the incoming chair.

Financial Records

- Transfer all existing bank accounts associated with the County Party to the new Chairman.
    - Name on the account
    - Update authorized Signature(s) on the account
    - Update mailing address if there is a change
    - Order new checks with appropriate information
    - Obtain and/or change username and password for online banking purposes
- Obtain the EIN Number (Employer Identification Number from the IRS) used for banking purposes in your county does not already have one.
    - If the county does have an EIN please follow the steps to update the contact on the account.
- Previous primary election finance records must be transferred along with all other previous financial records for the County Party.
    - This includes SOS log in information (username & password)

County Executive Committee (Precinct Chairs and Party Officers)

- The most current list of County Executive Committee (CEC) members should be handed over to the incoming Chairman. This list of individuals includes Officers and Current Precinct Chairs.
- Most current copy of County Party Bylaws.
- Previous agendas, and other materials used to at meetings
- Any information concerning the CEC meeting location (ie contracts, regulations, reservation polices and costs, etc.)
- Any contracts that are associated with the County Party

Online Communication/Social Media

- Username and Password
    - Email
    - Facebook page or group
    - Constant Contact (or similar email communication system)
    - Website
- Phone information if you have a generic number of cell phone for use of the County Chair.

Headquarters

- All utility bills etc should be contacted if address or account manager information needs to be updated.
- Keys to the Headquarters and/or changing the locks.

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Fundraising

- Username and Password for submission to the Texas Ethics Commission (TEC) and/or the Federal Ethics Commission (FEC) (if applicable.)
- Past paperwork regarding any past ethics filings.
- Any donor list(s) maintained by the County Party.
- Any materials, plans, papers related to fundraisers like the Reagan Dinner, etc.

Special Projects

- Any details concerning planning, contracts, regulations, printed materials and contacts regarding any special projects the County Party conducting.

Primary Election

- All ballot applications are public record and by state law must be kept for two years; at a minimum.
- SOS Account information including username & password.