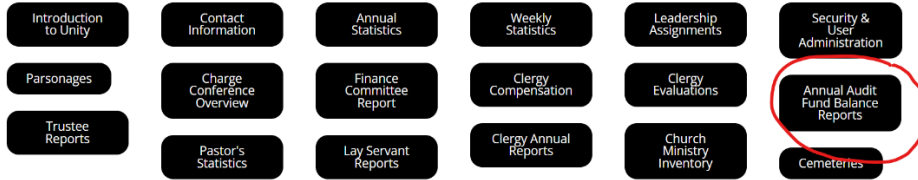


To Complete the Annual Fund Balance Report in Unity for a single Church:

FIRST STEP: Watch the 5 minute tutorial video at <https://vaumc.org/unity-web-video-assistance/> It explains the columns and what goes in each and how to avoid errors.

Topics:



You need a Unity Account. If you don't have one or don't remember your password, contact Lynn at Lynnmanley@vaumc.org

Log into Unity at <https://unity.vaumc.org/>

Click on (Specific Church Name) **Church section**

[Andrew Chapel\(Stafford\) Charge](#)

[Andrew Chapel UMC \(Stafford\) Church](#) 

Scroll Down and you will see **Church Annual Fund Balance Reports.**

[Annual Statistics](#)

Enter/View Annual Statistics for this church

[Church Audit Fund Balance Reports](#) 

Enter/View Annual Audit Fund Balance Reports for the Church


[Parsonage\(s\)](#)

Manage Church Parsonages and Enter Annual Review Reports

Click **Add New.**

Reporting Period	T1	T2	T3	Attachment	T1	T2	T3
1/1/2021 - 12/31/2021	Edit	View/Print	Upload Attachment				
1/1/2022 - 12/31/2022	Edit	View/Print	Upload Attachment				
1/1/2023 - 12/31/2023	Edit	View/Print	Upload Attachment				
1/1/2024 - 12/31/2024	Edit	View/Print	Upload Attachment	Created Jul 10 2025 5:52:06 PM	Replace	Download	

Showing 1 to 4 of 4 entries

[Add New](#) 

Previous 1 Next

Fill in the blanks.

Beginning date is 1.1.2025 and ending date is 12.31.2025

Click **Submit** at the bottom. It will save it and you can click View/print to see it. You can go back and edit it at any time. **How to know if there is a problem: If you hit Submit and it doesn't take you to a different overview page, THERE IS A PROBLEM.** Scroll back up until you see the warnings in Red telling you what is wrong. Correct those and then submit again. You can always go back in and edit it after it is submitted

How do I enter the form for a Multi-Church Charge? If you are part of a multichurch charge with charge funds, you would complete a report under the CHARGE section.

According to the Local Church Audit Guide put out by the GCFA, under "Information Required for the Audit,"

- Listing of all bank and investment accounts, including the person authorized to sign on each, and including any special use accounts under the control of the pastor(s) and in the name of the church.
- All other separate treasuries or bank accounts maintained by a group using the same employer's tax identification number as the church are to be audited, and thus should be listed on the annual fund balance report.

I've attached the Audit Guidelines from the Virginia Conference, the Local Church Audit Guide from the GCFA (General Council on Finance and Administration) and a blank form for those who want to see it before getting started.

The conference treasurer's office asked me to remind you that the Book of Discipline requires that each charge have an audit annually. If the church cannot afford a professional audit, they suggest a self audit by 2 volunteers (not the pastor, treasurer or financial secretary) or by swapping with another church nearby.