

## PATHWAYS ABILITIES SOCIETY

### **PROCEDURE: INVESTMENTS**

**Applies to:** All Personnel and Volunteers

Original Effective Date: July 21, 2001

Effective Date: January 28, 2013

Replaces Procedure Dated: September 12, 2011

1. The finance manager monitors the day-to-day status of Pathways Abilities Society investments and makes recommendations to the executive director and secretary treasurer.
2. The executive director, finance manager and secretary treasurer regularly review Pathways Abilities Society investments. They may individually or collectively consult with an independent financial advisor.
3. Investments recommendations are submitted to the Board of Directors for their consideration and approval.
4. Investments are audited annually and recommendations implemented immediately.