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Financial Policy Builder

Nonprofit, NGO & Social Sector

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Drafts a financial policy — budgeting, approvals and delegation limits, cash and bank rules, procurement thresholds and quotes, reporting and audit, and asset management. Use this to document your financial rules. Approve it at board level and adapt it. For the controls behind it use the Internal Controls Framework.

Purpose of this tool & output

Document your financial rules

How the output is used

Adopt a financial policy that documents your financial rules on approvals, controls and reporting.

Who receives it

Approved by the board; applies to all finance and program staff handling funds.

Important cautions

AI-generated policy; approve at board level and adapt.

Companion documents

- NGO Financial Management Guide
- Fund Accounting Setup
- Organisational Budget Builder
- Financial Report Builder
- Utilisation Certificate Builder
- Internal Controls Framework

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.