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MEMORANDUM

DATE: September 21, 2020

TO: Fund Financial Managers

CC: Suzanne Fortier, Principal and Vice-Chancellor
Faculty Financial Officers
Financial Services Teams

FROM: Yves Beauchamp, Vice-Principal, Administration and Finance
Cristiane Tinmouth, Associate Vice-Principal, Financial Services

RE: Fund Financial Management

As we begin a new academic year at McGill, we write to remind all Fund Financial Managers that you play an important role with regards to the safeguarding and sound management of public funds entrusted to the University.

Responsibilities of Fund Financial Managers include timely monitoring of a fund's transactions, adherence to policies, compliance with any externally imposed restrictions, as well as ensuring that there are no over-expenditures. This message serves as a reminder of the resources available to you in discharging your obligations in this capacity, in accordance with internal and external policy, and keeping in mind the best interests of the University. Most notably, these resources include:

- Faculty Financial Officers (FFO) and Financial Services Teams (FST), who disseminate and implement policies, procedures and guidelines and act as primary point of contact for financial and research fund administration;
- Regulations and policies on various matters such as Fund Financial Managers, Reimbursement of Expenses, and Financial Approvals of Purchase Requisitions, among others. These can be found here: [Financial Policies/Regulations](#);

- The [Financial Services](#) website which allows you to research various finance-related topics;
- Courses which are available to all fund financial managers via Financial Services;
- The Financial Services Help Desk, which can answer any questions you may have. They can be reached at extension 3463 or by email at: fishelp.acct@mcgill.ca.

Financial Services, your Faculty Financial Officer and Financial Services Teams are available to help you in managing this responsibility. Please do not hesitate to be in touch with them so that you may fulfill your role to the best of your ability.

Thank you for serving the University in this key capacity.



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