



District 4

John E. Shinn
District Director

Del Vitale
Assistant to the Director

Stephen J. Finnigan
Sub-District Director

December 5, 2018

To: Local Union Presidents, Treasurer, Financial Officers, and Recording Secretaries

From: Stephen J. Finnigan, Sub-District Director, Milford, MA

Re: **LM Conference and Presidents Meeting**
Wednesday, February 13, 2019
Registration: 8:30am, Seminar: 9:00 am
Hawthorn Suites
835 Upper Union Street
Franklin, MA 02038
508-553-3500

The LM Conference will be held on Wednesday, February 13, 2019

A President meeting will be held during the LM training program with Director John Shinn.

It is important that all Presidents attend this meeting, as the Director will be touching on numerous important topics.

DOL Mandatory Electronic LM Filing For 2018

Take the following sets to be prepared to electronically file before attending your LM Class

- www.olms.dol.gov
- Electronic Forms System (EFS)
- Register for EFS User ID and password (President, Fin. Sec. & Treasurer)
- If you are a signer, register as a signer, if you are a preparer, register as a preparer
- Complete the registration form by creating a USER ID and PASSWORD (you will need an email address to get verification from the DOL)
- After you have registered yourself, you need to obtain a UNION PIN NUMBER. The Local Union Pin Number is good for one year.
- **Bring your USER ID, PASSWORD & UNION PIN NUMBER to the LM Class**

United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers International Union

100 Medway Road, Suite 403, Milford, MA 01757 • 508-482-5555 • 508-482-9343 (Fax) • www.usw.org



LIST OF REQUIRED MATERIALS TO BRING TO LM REVIEW

1. FINANCIAL SECRETARY'S CASHBOOK – HARD COPIES
2. TREASURERS' CASHBOOK
3. ALL BANK STATEMENTS FOR THE YEAR 2018-ALL ACCOUNTS
4. ALL INTEREST STATEMENTS CHECKING, CD'S MONEY MARKETS (IF APPLICABLE)
5. IF LOCAL UNION MAINTAINS SEPARATE BANK ACCOUNTS FROM THEIR REGULAR CHECKING ACCOUNT, THESE MUST ALSO BE AVAILABLE
6. W-2'S AND W-3 FOR THE YEAR 2018
7. FORMS 431 (INDIVIDUAL EARNINGS RECORDS, YELLOW SHEETS) FOR THE YEAR 2018
8. TAX RECORDS (IRS FORM 941/944, STATE TAX, STATE UNEMPLOYMENT TAX)
9. FORM AR251 (ANNUAL REPORT) FOR THE YEAR 2018 – HARD COPY
MUST BE COMPLETED AND BALANCED PRIOR TO LM REVIEW SESSION
10. ITEM 24 ON THE LM-3, "ALL OFFICERS AND DISBURSEMENTS TO OFFICERS"
MUST BE COMPLETED PRIOR TO THE LM REVIEW SESSION
11. COPY OF PREVIOUS YEAR'S LM FORM
12. THE PIN NUMBER ISSUED BY THE DEPARTMENT OF LABOR FOR FILING ELECTRONICALLY-IF OBTAINED BY LOCAL PRIOR TO REVIEW
13. USER ID'S AND PASSWORDS FOR PRESIDENT AND TREASURER FOR ATTACHING ELECTRONIC SIGNATURES TO LM FORM-IF OBTAINED PRIOR TO REVIEW
14. LOCAL UNION'S LAPTOP COMPUTER

Registration fee is **\$75.00** per person. The fee will include a breakfast buffet and lunch. Checks should be made payable to USW District 4 and mailed with registration form to the Sub-District Office at 100 Medway Road, Suite 403, Milford, MA 01757, by **Friday, January 25, 2019.**

ALL LOST TIME AND EXPENSES INCURRED MUST BE BORNE BY YOUR LOCAL.

We hope that this will be a successful conference and that all locals will participate.

SJF/ald

Attachment

LOCAL UNION #

REGISTRATION FORM

Hawthorn Suites
835 Upper Union Street
Franklin, MA 02038
508-553-3500

*Please return completed form
and your check by*

January 25, 2019

8:30 – 9:00 AM – Registration
9:00 – Seminar Begin

The following are the names and titles of the officers who will be attending the LM Seminar on Wednesday, February 13, 2019.

LM Workshop

Name: _____ Name: _____
Title: _____ Title: _____
Name: _____ Name: _____
Title: _____ Title: _____
Name: _____ Name: _____
Title: _____ Title: _____
Name: _____ Name: _____
Title: _____ Title: _____

The following is the name of President who will be attending the Presidents Meeting on Wednesday, February 13, 2019.

Presidents Meeting

Name: _____
Title: _____

Please complete this form and make check payable to: **USW District 4**

Mail completed form and check to: United Steelworkers
100 Medway Road, Suite 403
Milford, MA 01757
Attn: Amy Durand