



Town of Templeton – Advisory Committee

Request for Transfer Between/Within Accounts



All requests must be approved prior to spending beyond current appropriation. Requestors are encouraged to accompany COMPLETED request forms in-person to the Advisory Committee meeting to answer any questions the board may have. This will avoid delays and ensure a timely decision on the request. PLEASE NOTE that any requests MUST be approved by the Board of Selectpersons BEFORE coming to the Advisory Committee for final approval.

Approval Signature Loop

SIGNATURE	PRINT NAME	SIGN NAME	DATE
Requestor			
Board of Selectpersons - Chair			
Advisory Committee - Chair			

This request is made for the described transfer between accounts, in accordance with Massachusetts General Laws, Chapter 44, Section 33B.

TOTAL AMOUNT REQUESTED: \$ _____

From Account Name(s)	From Account Number(s)	Amount(s)
To Account Name(s)	To Account Number(s)	Amount(s)

Requests must include the following information. Add additional pages as necessary.

- **PURPOSE OF REQUEST:** (Describe how the funds will be used.)

- **REASON FOR REQUEST:** (Explain the circumstances that make the request necessary.)

- **ALTERNATIVE PROPOSALS CONSIDERED:** (List, including cost estimates, pros & cons, etc.)

- **IMPACT IF REQUEST IS DENIED:** (Describe the emergency nature of the request.)

ADVISORY COMMITTEE ACTION:

Meeting Date	Members Present and Voting	
Transfer Approved (Circle One)	YES	NO
Amount Approved	\$	
Comments:		

NOTES –

- All information on the Transfer Between/Within Accounts Request Form must be completed BEFORE submission to the Advisory Committee for consideration. This includes:
 - Signatures as indicated on the form
 - Account names and numbers (to and from), balance, and amount requested. Include and explain any differences if your account balance is different from the Town Accountant records. Examples of differences that are likely to occur include:
 - Expenditures that have been authorized but not yet paid
 - Goods or services received but not yet invoiced
 - Complete explanations as indicated on the form. Additional sheets and supporting documents are encouraged as necessary. It is acceptable and encouraged to attach the form (with signatures) to your explanations of Purpose, Reason, Alternatives, and Impact.
- To avoid delays, the Advisory Committee recommends that you or your designated representative be present to provide clarification to questions as they arise. In our experience there are always questions from the Advisory Committee.
- Bear in mind that while you may possess knowledge and information to believe a transfer is warranted, the Advisory Committee may not (and most likely will not) have that knowledge and information. It is your responsibility to convey that information to the Advisory Committee in a manner appropriate to allow the Committee to consider the request fairly, accurately, and impartially.

Revision History

Revision Number	Revision Date	Author	Next Review Date
1	October 7, 2021	Matthew Rivard AC Chairperson	October 31, 2024. If revised before this date, three (3) years from that revision date.