



Poppy Funds:

Purpose, Administration, and Timelines



BRITISH COLUMBIA/
YUKON COMMAND

Workshop Topics

🔄 What are Poppy Funds?

≡ Reporting Requirements

📅 Poppy Campaign & Ordering Timeline

☑ Poppy Fund Do's and Don'ts

🎓 Bursaries

📁 Special Use Expenditures (SUEs)

? Q&A

Legion Mission

- The Royal Canadian Legion's mission is to serve Veterans, including serving military and RCMP members and their families, to promote Remembrance, and to serve our communities and our country.


Who is a Veteran?

Veteran

 Canadian Armed Forces
(current/honorably discharged)

 Commonwealth/wartime allies Veterans

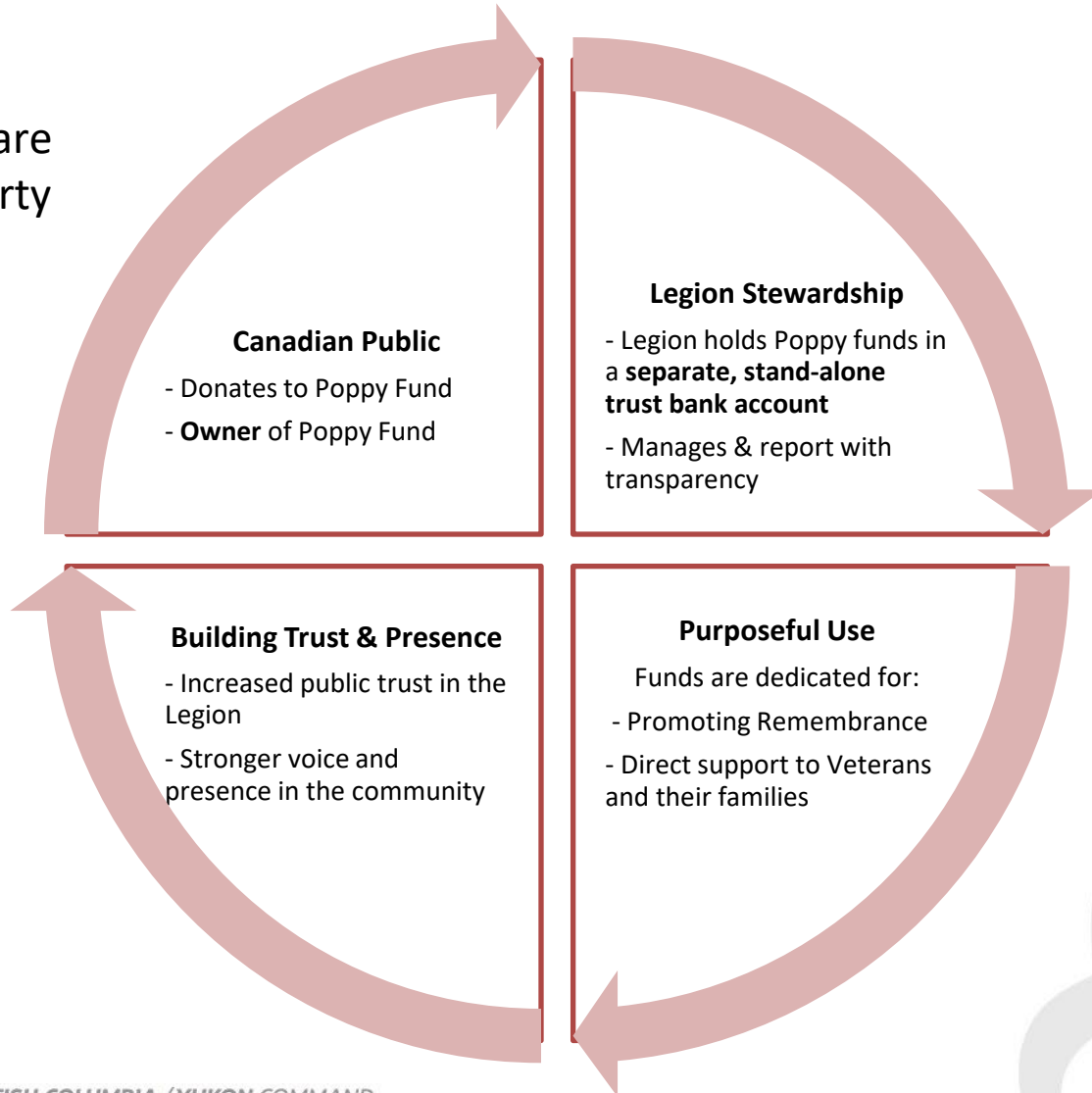
 Regular RCMP members

 Merchant Navy/Ferry Command
(wartime service)

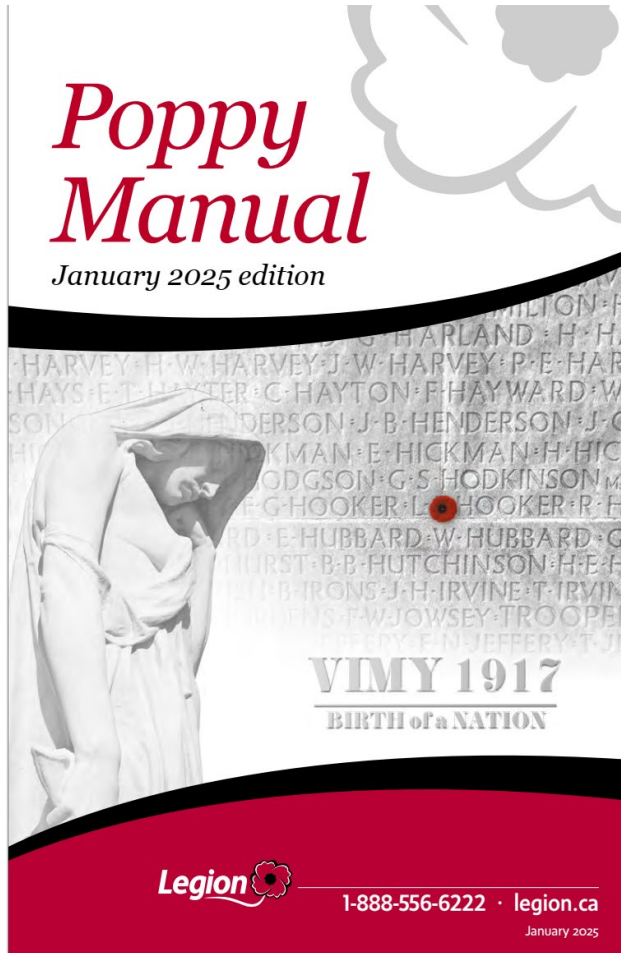
 Peace Officers

What are Poppy Funds?

⚠ Poppy Funds are **not** Legion property

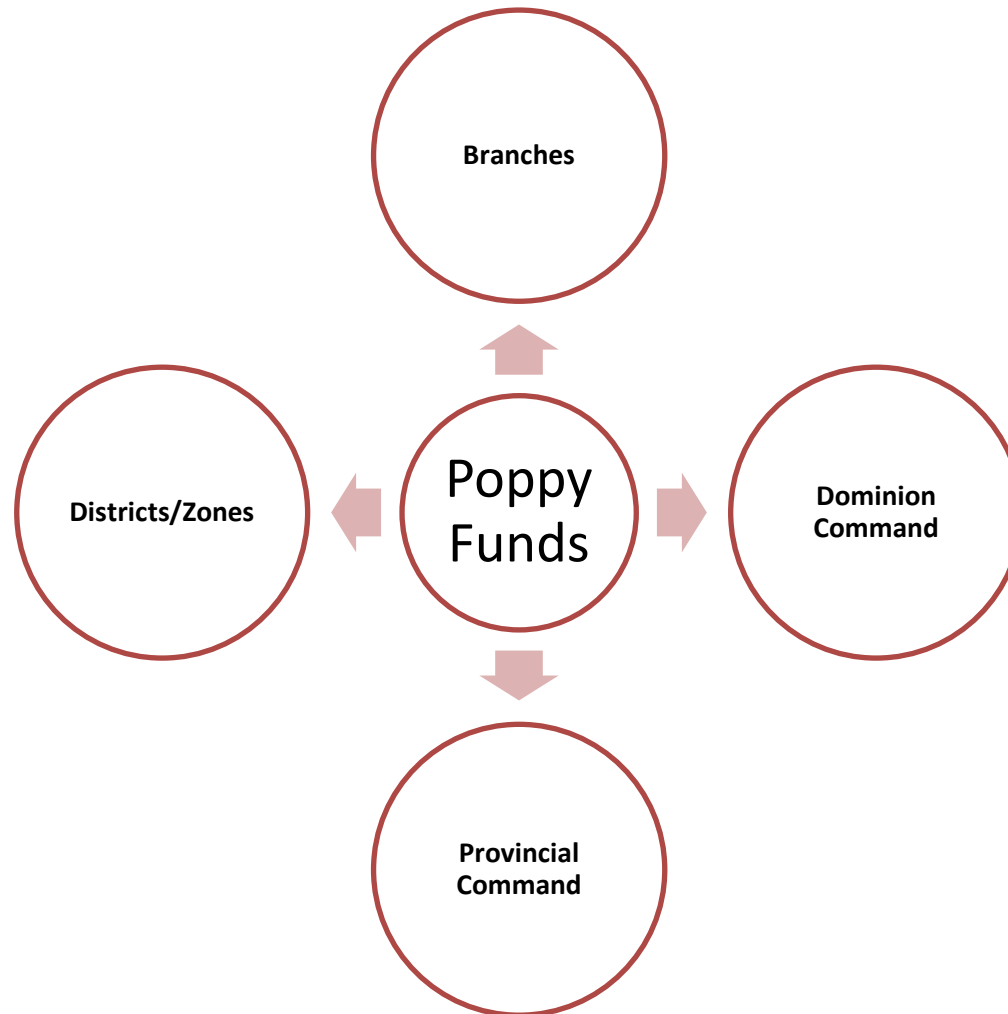


Administration



Your **first** resource when you have questions about the administration of Poppy Funds

4 Levels of Poppy Funds



Poppy Campaign Responsibilities and Financial Management

Dominion Command Responsibilities

Policy Development

- Create & update rules for Poppy Fund

Oversight & Compliance

- Ensure funds are spent as authorized

Misuse Monitoring

- Identify and address improper use

Review Special Requests

- Consider applications for unusual expenditures

BC/Yukon Command Responsibilities

Planning & Execution

- Plan, organize & implement all Poppy/Remembrance activities

Policy Communication

- Communicate policy to all Zones & Branches

Reporting

- Ensure Branch returns are submitted on time

Financial Oversight

- Poppy Fund Statement & Poppy Audit

Branch Responsibilities

Leadership & Planning

- Appoint Poppy Chair & Remembrance Committee
- Clarify roles & responsibilities for participants

Sourcing Materials

- Use only authorized Dominion Command supplies, sourced via Provincial Command

Financial Accountability

- Comply with General By-Laws:
 - 1102: Separate trust bank account
 - 1103: Authorized investments allowed
 - 1104: Disbursements following Poppy Manual

Branch Annual Compliance Requirements



- ☒ Branch Poppy Fund Statement
- ☒ Poppy Fund Assessments
- ☒ Poppy Fund Audits

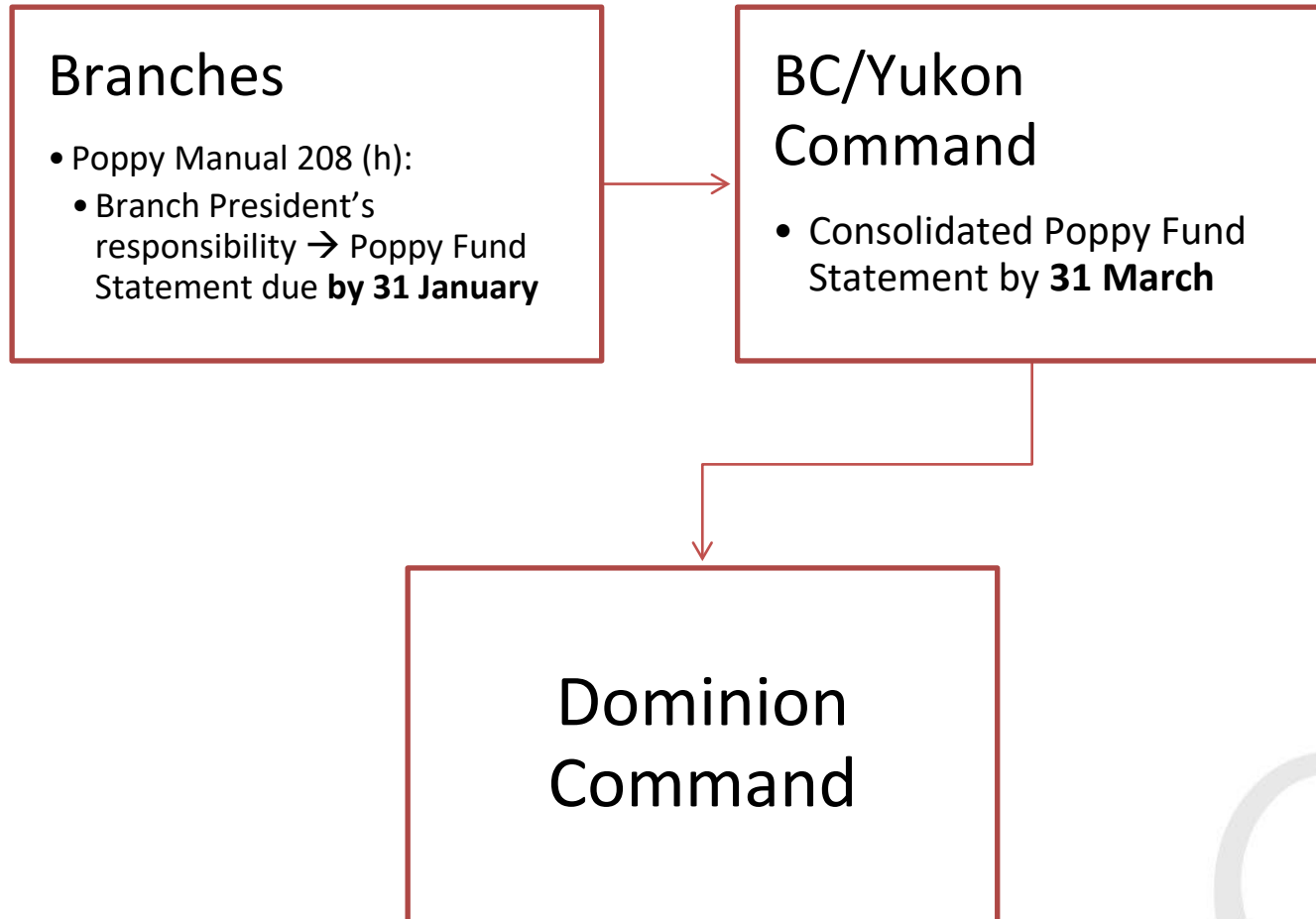


Reporting Requirements – Poppy Fund Statement

Purpose

- Information is used by BC/Yukon Command and Dominion Command to:
 - Analyze the success of the campaign
 - Plan future campaigns
 - To assess how Branches/Commands are performing financially

Reporting Requirements – Poppy Fund Statement



Reporting Requirements – Poppy Fund Statement

BRANCH POPPY FUND STATEMENT January 1, 2024 - December 31, 2024

Your attention is directed to the Poppy Manual of the Royal Canadian Legion and in particular, to Section 400 in which it states "each Branch shall forthwith such information relating to the affairs of the Branch as may from time to time be required by its Provincial Command or by Dominion Command." In order to comply with these by-law provisions you must submit this completed form to BC/Yukon Command Office as directed.

Please see next page for descriptions of expenses.

Branch Name & Number: _____

1. Balance as outlined in Item 1 next page. Branch Poppy Fund at December 31, 2023 as per bank statement	\$
2. Add: Donationss/Receipts/Interests (Poppy Fund revenues from all sources)	\$
3. General Adjustment Line + or (-). If used please explain on a separate paper	\$
Total "A" (sum of line 1 to 3)	\$
4. Cost of:	
a) Poppies and Wreaths	\$
b) Promotional Material	\$
c) Campaign Expenses	\$
d) Grants to Serving/Ex-service Personnel/dependants	\$
e) Poster and Literary Contest (include Zone prizes if applicable)	\$
f) Special Use Expenditures (Section 403 of the Poppy Manual)	\$
g) Bursary Donations in Community	\$
h) Poppy Assessment to BC/Yukon Command	\$
Total "B" (sum of line 4 a) to 4 h))	\$
5. Ending Balance at December 31, 2024 (Total "A" - Total "B" = Balance)	\$

Certified the above amount is the balance as at December 31, 2024

Please Print Name _____

Signature - Branch President _____

Please Print Name _____

Signature - Branch Treasurer _____

DEADLINE FOR RECEIPT OF THIS STATEMENT TO BC/YUKON COMMAND IS JANUARY 31, 2025



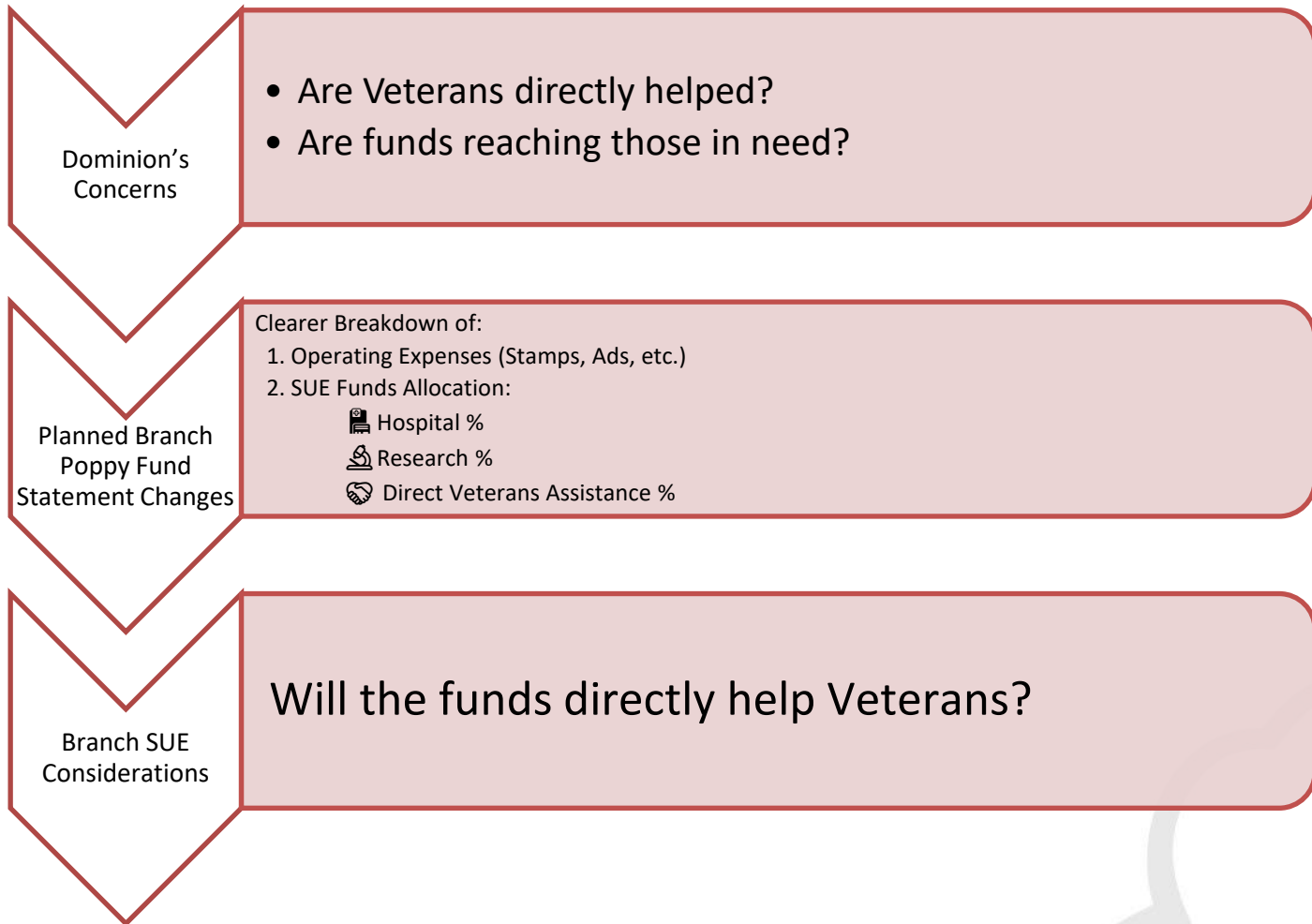
Reporting Requirements – Poppy Fund Statement

Documents Required



- ☒ Due to Command by **Jan 31**
- ☒ Copies of bank statements for the Poppy Fund account from **Jan 1 – Dec 31**
- ☒ Electronic copies preferred
- ☒ No staples please

Reporting Requirements – Poppy Fund Statement



Reporting Requirements – Poppy Fund Assessment

Purpose

- Revenue source for Command Poppy Fund to fund:
 - Emergency funding Veteran Assistance
 - Command Service Bureau
 - Poppy Coordinator
 - Poppy Campaign operations
 - Poppy Programs – Poster & Literary



Reporting Requirements – Poppy Fund Assessment

BC/Yukon Command of the Royal Canadian Legion
Annual Branch Poppy Fund Income Assessment Remittance Form

1 January 2024 through 31 December 2024

Branch Name: _____ Branch #: _____

Poppy Campaign Income	Amount of Revenues Earned	4.5% Assessment
1 January, 2024	\$ _____	\$ _____
2 February, 2024	\$ _____	\$ _____
3 March, 2024	\$ _____	\$ _____
4 April, 2024	\$ _____	\$ _____
5 May, 2024	\$ _____	\$ _____
6 June, 2024	\$ _____	\$ _____
7 July, 2024	\$ _____	\$ _____
8 August, 2024	\$ _____	\$ _____
9 September, 2024	\$ _____	\$ _____
10 October, 2024	\$ _____	\$ _____
11 November, 2024	\$ _____	\$ _____
12 December, 2024	\$ _____	\$ _____
Total	\$ _____	\$ _____

→ *This amount is DUE in to BC /Yukon Command by January 31, 2025

	Branch President	Branch Treasurer
Name in Print	_____	_____
Signature	_____	_____

KEEP A COPY OF THIS ON FILE WITH THE CAMPAIGN INFORMATION AND REPORT ON
THE ANNUAL BRANCH POPPY FUND STATEMENT FOR THE 2025 CAMPAIGN

Please attach a copy of each months bank statement for reference purposes, thank you!



BRITISH COLUMBIA / YUKON COMMAND

- Due **January 31**
- Covers period from **Jan 1 to Dec 31** of the prior fiscal year
- Assessed on **all** Poppy revenues
 - Including Investments

Reporting Requirements – Poppy Fund Assessment

Documents Required



Branch Poppy Fund Assessment form



Cheques/proof of payment



Copies of bank statements for the Poppy Fund account from **Jan 1 – Dec 31 (one copy for both Poppy Fund Statement and Assessment)**









Electronic copies preferred



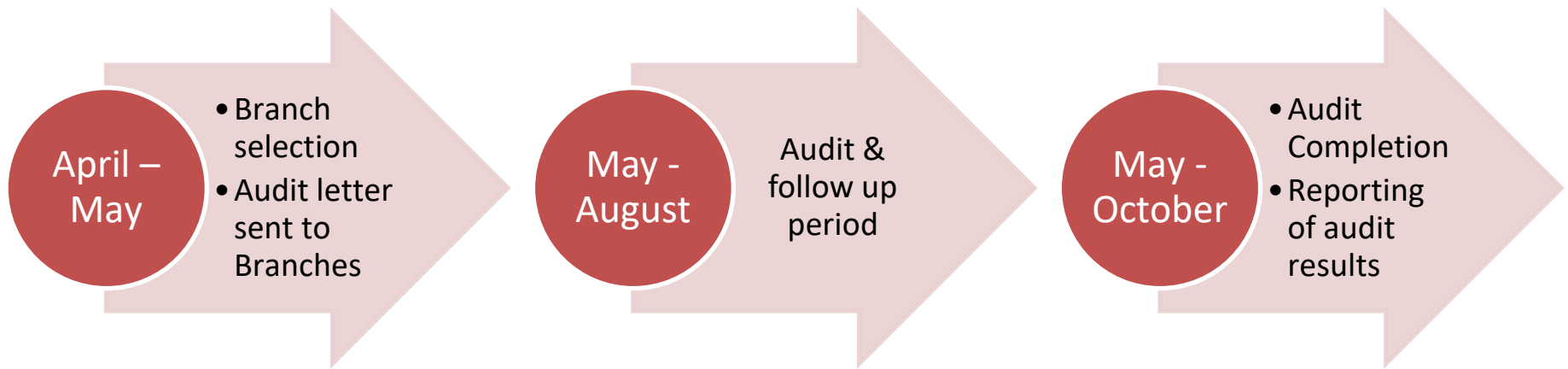
No staples please

Reporting Requirements – Poppy Audit

Purpose

-  Strengthen public trust
-  Ensure proper use of Funds
-  Maintain financial accountability
-  Comply with legal and Legion standards
-  Identify and address issues
-  Help improve controls

Reporting Requirements – Poppy Audit



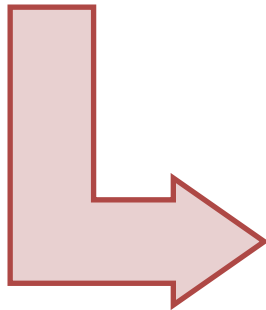
⚠ If issues are encountered, Branches may be audited multiple years in a row

Reporting Requirements – Poppy Audit

⚠ Poppy Fund Non-Compliance

Emphasis on
Financial
Accountability

- Repayment from General Fund
- Recommendation for Control Improvement
- Help from BC/Yukon Command



Persistent or
Material Non-
Compliance

- Flagging
- Probationary Management
- Trusteeship

BC/Yukon Command's Goal: Support, Educate & Improve

Reporting Requirements – Document Retention Summary

Keep a Copy

Always retain a copy of all submitted documents

No Originals

Do not send original paperwork

Preferred Method

Scan and email documents

Hard copies only if absolutely necessary

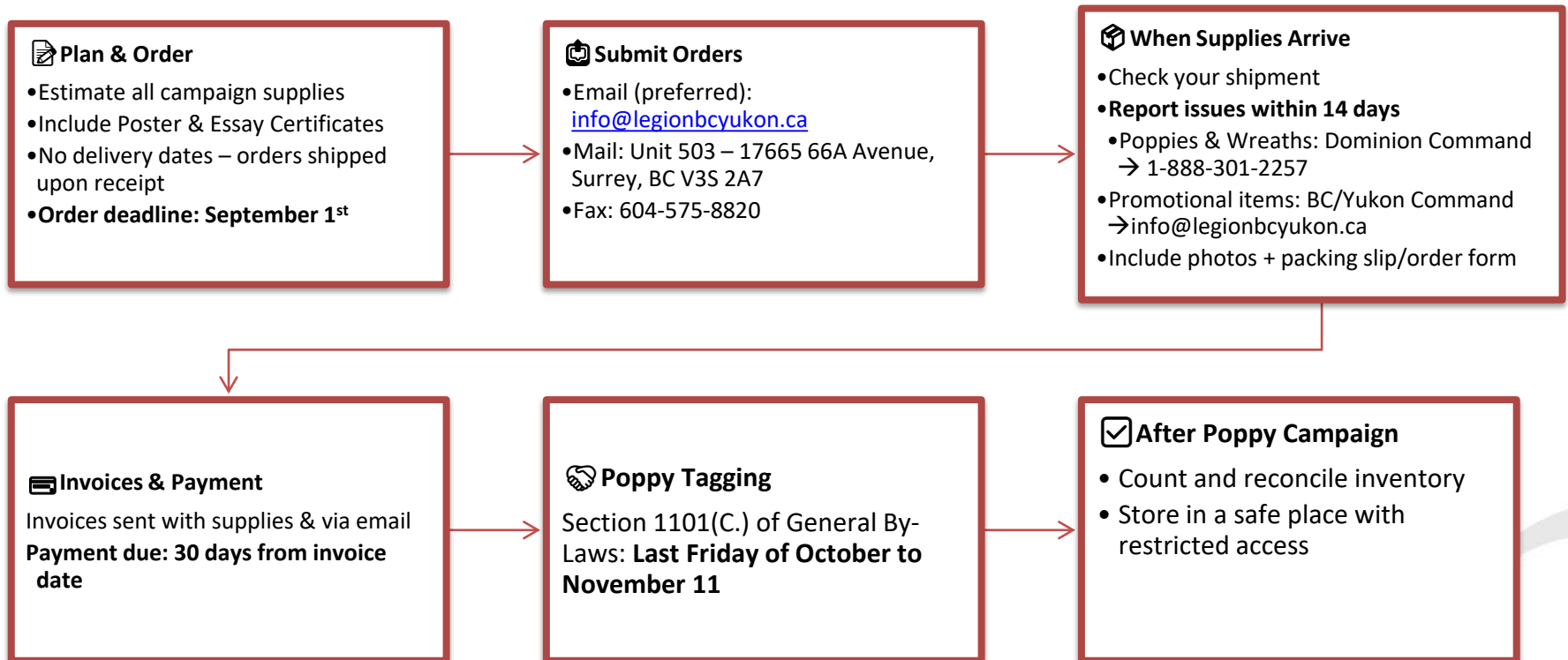
Bank Statements

Only one copy of full-year statements needed for both:

- *Poppy Fund Statement*
- *Poppy Fund Assessment*

No Staples

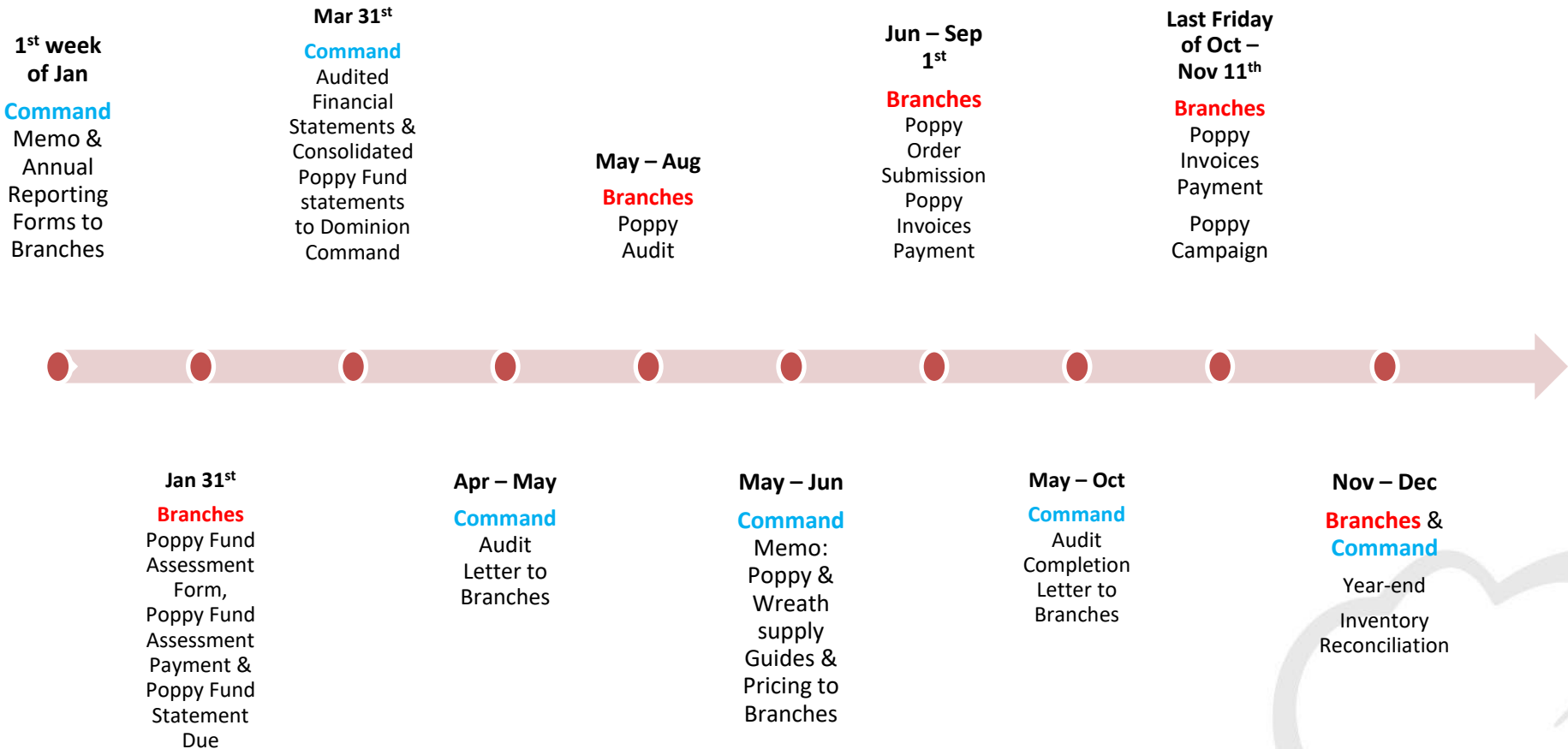
Poppy Campaign – Poppy Order Processes



Poppy Campaign – Poppy Campaign Tips

[illegible]

Timeline Summary



Poppy Fund: Do's and Don'ts

Poppy Manual: Chapters 4 & 5

- ☒ Keep Funds in a separate Trust Bank Account
- 🔍 Ensure all fund use is pre-approved
- ☎️ If unsure, contact BC/Yukon Command *before* spending
- ⚠️ Unapproved use must be repaid from Branch General Funds

Poppy Fund: Do's and Don'ts

Feature	Bursary	Scholarship
Based on	Financial need	Academic achievement, talent, or other merit criteria
Application Process	Includes income documentation and financial details	Often includes academic transcripts, essays, references
Eligibility	<ul style="list-style-type: none"> • Veteran • Descendant/spouse of Veteran • Low income • Financial need demonstration 	High grades, leadership, athletics, arts, community service
Purpose	Provide access and support to those in financial hardship	Recognize and reward excellence or potential
Source of Funds	<ul style="list-style-type: none"> ✓ Poppy ✓ General ✓ Lottery (with restrictions) 	<ul style="list-style-type: none"> ⊘ Poppy Fund prohibited ✓ General ✓ Lottery (with restrictions)

Poppy Fund: Do's and Don'ts

Bursaries

- Application Package
 - [Branch Corner](#)



Bursary Application - Regulations and Information

Section I

Student Information

- Please print clearly or type all information requested
- You must reside in British Columbia or the Yukon and be a Canadian Citizen

Section II

College/University Information

- Provide the name and address of the post-secondary institution you will be attending
- The institution must be in British Columbia or the Yukon (only special exceptions to this apply such as – applicants living in the Kootenay Zones may apply to Calgary, Alberta institutions as it is closer to your residence)
- Bursaries are awarded to students attending accredited institutions on a full time basis for two consecutive semesters
- Post graduate studies do not apply
- Up to \$1000.00 per student are awarded to successful applicants attending College, Vocational or Trade School. This amount is a guideline only. The Branch may decide to adjust this amount as they consider their available funds and the number of applicants.
- Up to \$1500.00 per student are awarded to successful applicants attending University or a third or fourth year college. This amount is a guideline only. The Branch may decide to adjust this amount as they consider their available funds and the number of applicants.

Section III

Financial Information

- This section is confidential and must be completed at the Branch interview
- The applicant is responsible for setting up an interview with an Executive member of The Royal Canadian Legion Branch closest to where you reside in that particular Zone. The applicant must contact this local Legion Branch to arrange for this interview. Do not simply drop off the application and expect someone to contact you; otherwise the application is considered incomplete and will not be considered
- Bursaries are granted to students who are Veterans, children, grandchildren or great-children of any of the eligible personnel, who are in need of financial assistance. This eligible person is defined as a Veteran by The Royal Canadian Legion's General By-Laws subsection 101.d. :
 - A Veteran is any person who is serving or who has honourably served in the Canadian Armed Forces, the Commonwealth or its wartime allies, or as a regular member of the Royal Canadian Mounted Police, or as a Peace Officer in a special duty area or on a special duty operation, or who has served in the Merchant Navy or Ferry Command during wartime
- Financial need is considered in part by the gross household income as determined by the Canada Student Grant for low and middle-income families. Special exceptions may apply, branches will utilize these thresholds as a part of considering financial need of the applicant.

2024 income thresholds (pre-tax income in previous year) – this is an example, please click link below

Family Size	1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 or more
Max. Income	\$68,324	\$95,664	\$114,436	\$126,441	\$137,460	\$147,862	\$156,919

<https://www.canada.ca/en/employment-social-development/services/student-financial-aid/student-loan/student-grants/csg/full-time.html>



Poppy Fund: Do's and Don'ts

Bursaries



Certificate of Understanding

Poppy Bursaries Guidelines

Members of our committee for the selection and awarding of bursaries to students, have reviewed the guidelines as set out and agree to follow the procedure as set out by the Executive Council on October 1996.

We acknowledge the eligibility criteria for the recipients of a bursary from the Poppy Fund must be in financial need and are children or grandchildren of veterans. We hereby confirm our understanding of the requirements concerning use of Poppy Funds for bursaries.

Branch No. _____ Branch Name _____

Date of meeting _____, Year _____

Signature of Branch Secretary _____

Signature of Branch Poppy Chair _____

Signature of Zone Commander _____

***Please keep a copy for your records and return a copy of this form to
BC/Yukon Command***

REMEMBER • JOIN • GIVE



BRITISH COLUMBIA / YUKON COMMAND

Poppy Fund: Do's and Don'ts

Bursaries – CRA Compliance

Issuance Requirement:

>\$500 Bursary Payment → T4A Slip **mandatory** even if not taxable to recipient

≡ Information Required:

- **From Recipient:**

- ☐ Full legal name
- ☐ Mailing address
- ☐ Social Insurance Number (SIN)
- ☐ 15-digit CRA payroll account number of the educational institution (if paid directly to the institution)

- **From the Branch:**

- ☐ 15-digit CRA payroll account number (9-digit business number + RP000x)
- ☐ Legal name of the Branch
- ☐ Mailing address
- ☐ Contact details for CRA-authorized representative

Poppy Fund: Do's and Don'ts

Bursaries – CRA Compliance

Jan – Dec of the calendar year

Bursaries Issued



Last day of February following the calendar year

T4As to CRA

T4As to Recipients

Late Filing Penalties

Number of information returns (slips) filed late	Penalty per day (up to 100 days)	Maximum Penalty
1 to 50	\$ 10	\$ 1,000
51 to 500	\$ 15	\$ 1,500
501 to 2,500	\$ 25	\$ 2,500
2,501 to 10,000	\$ 50	\$ 5,000
10,000 or more	\$ 75	\$ 7,500

Poppy Fund: Do's and Don'ts

Bursaries – CRA Compliance

Branch Legal Name

Year of Payment

Clear Data

T4A
Statement of Pension, Retirement, Annuity, and Other Income
État du revenu de pension, de retraite, de rente ou d'autres sources

Payer's name – Nom du payeur
BC/Yukon Command of The Royal Canadian Legion

Canada Revenue Agency
Agence du revenu du Canada

Year
Année 2025

Branch CRA Payroll #

Payer's program account number
Numéro de compte de programme du payeur
123456789RP0001

061

015

016

022

012

013

018

020

012 123 456 789

013 987654321 RP 0001

018

020

Recipients name and address – Nom et adresse du bénéficiaire

YUAN **EMILY**

Unit 123 - 123 Street
Surrey, BC, A1B 1A1

Recipients mailing address

Recipients legal name

Other information (see page 2)
Autres renseignements (voir à la page 2)

Box – Case **Amount – Montant**

105 **2,001.45**

Total bursary amount paid for the year

Only use Box 013 if recipient is a business. Enter recipient's business account number. If this box is completed, then box 012 is not required

T4A (24) Protected B when completed / Protégé B une fois rempli

Poppy Fund: Do's and Don'ts Bursaries – CRA Compliance

Canada Revenue Agency / Agence du revenu du Canada

0101 T4A SUMMARY / SOMMAIRE

Protected B when completed / Protégé B une fois rempli

For the year ending December 31, / Pour l'année se terminant le 31 décembre: **20 25**

Do not use this area / N'inscrivez rien ici

Payer's account number (15 characters) – Numéro de compte du payeur (15 caractères): **123456789RP0001**

Name and address of employer or payer – Nom et adresse de l'employeur ou du payeur: **BC/Yukon Command of The Royal Canadian Legion
1503 - 17665 66A Avenue
Surrey, BC V3S 2A7**

You have to file the T4A return on or before the last day of February. See the information on the back of this form. / Vous devez produire votre déclaration T4A au plus tard le dernier jour de février. Lisez les renseignements au verso de ce formulaire.

Total from T4A slips – Totaux des feuillets T4A	
Total number of T4A slips filed – Nombre total de feuillets T4A produits	2
Pension or superannuation – Prestations de retraite ou autres pensions	
Lump-sum payments – Paiements forfaitaires	
Self-employed commissions – Commissions d'un travail indépendant	
Annuities – Rentes	
Other income – Autres revenus	
Patronage allocations – Répartitions selon l'apport commercial	
RPP contributions (past service) – Cotisations à un RPA (services passés)	
Pension adjustment – Facteur d'équivalence	
RESP accumulated income payments – Paiements de revenu accumulé d'un REEE	
RESP educational assistance payments – Paiements d'aide aux études d'un REEE	
Fees for services – Honoraires ou autres sommes pour services rendus	
Other information – Autres renseignements	3,447.58
Income tax deducted – Impôt sur le revenu retenu	
Minus: remittances – Moins: versements	
Difference (Generally, the CRA does not charge or refund a difference of \$2 or less.) / Différence (Généralement, l'ARC n'exige ni ne rembourse une différence de 2 \$ ou moins.)	
Overpayment – Paiement en trop	
Balance due – Solde dû	
Agency use only – Réserve à l'Agence seulement	
Registration number(s) for RPP or DPSP / Numéro(s) d'agrément pour le ou les RPA ou RPDB	
Canadian-controlled private corporations or unincorporated employers / Sociétés privées sous contrôle canadien ou employeurs non constitués	
SIH of the proprietor(s) or principal owner(s) – NAS du ou des propriétaires	
Person to contact about this return – Personne avec qui communiquer au sujet de cette déclaration	Michelle Courtney
Area code / Indicateur régional	604
Telephone number / Numéro de téléphone	575-8840
Extension / Poste	
Certification – Attestation	
I certify that the information given in this T4A return (T4A Summary and related T4A slips) is correct and complete to the best of my knowledge. / J'atteste que les renseignements fournis dans cette déclaration T4A (le T4A Sommaire et les feuillets T4A connexes) sont, à ma connaissance, exacts et complets.	
Date	2026-01-31
Signature of authorized person – Signature d'une personne autorisée	Executive Director
Position or office – Titre ou poste	
Do not write in this area – Ne rien écrire dans cet espace	
090 1 Last to current / Précédente à courante	091 1 No / Non
2 No action / Aucune mesure	2 Yes / Oui
3 Other / Autres	
093 Date	Memo – Note
097 NLPP / APPT	098 NLIEFP / APPEO
Late-filing penalty / Pénalité pour production tardive	
Prepared by – Établi par	
Date	

See the privacy notice at the bottom of next page. / Consultez l'avis de confidentialité au bas de la page suivante.

T4A SUM (24)

Page 1 of / de 2

Canada

Calendar year of
bursary payments

Branch CRA payroll account number

Branch legal name & mailing address

Total # of T4A slips filed for the year

Total amount of bursary
payments for the year

Contact info for the person
who filled out the form

Date, signature & position for
the person who filled out the
form



BRITISH COLL

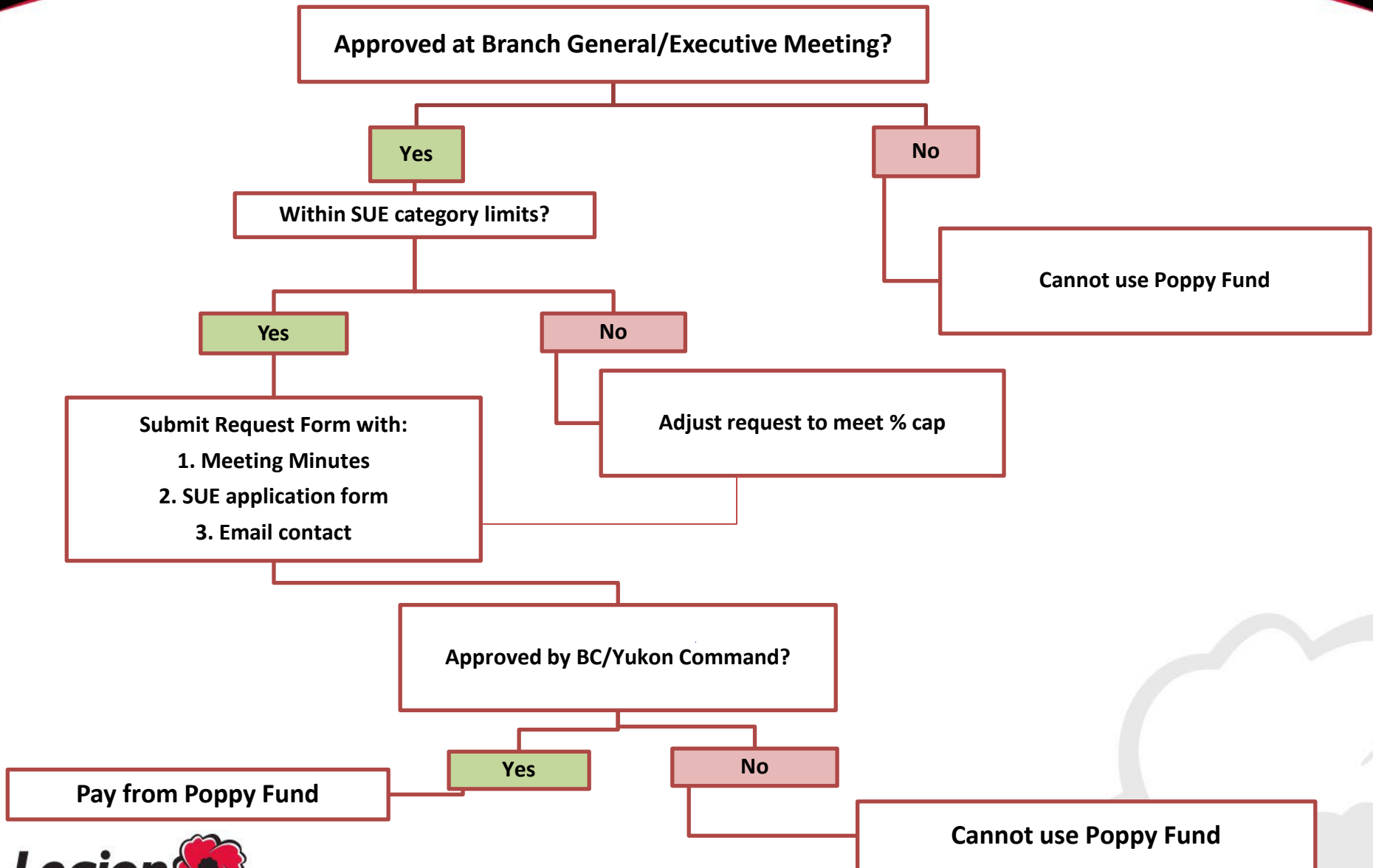
Poppy Fund: Do's and Don'ts

Bursaries – CRA Compliance

CRA Approved Methods for Filing T4A Slips

Filing Method	Best For	Slip Limit	Filing Type
Web Forms	Small filers, manual entry	Up to 100	CRA online portal (real-time)
Internet File Transfer (XML)	Larger filers, automated batch submissions	Unlimited	CRA online portal (upload)
Authorized software (Efile)	Accountants, Bookkeepers, NPOs with software	Depends on software license	Online
Paper Filing	Very small filers	Max 5	Mail

Special Use Expenditures



Special Use Expenditures Application Tips

Key Principle

Clear Details = Faster Approvals

Examples of Required Details

 Medical Appliances (403ii c) → Specify:

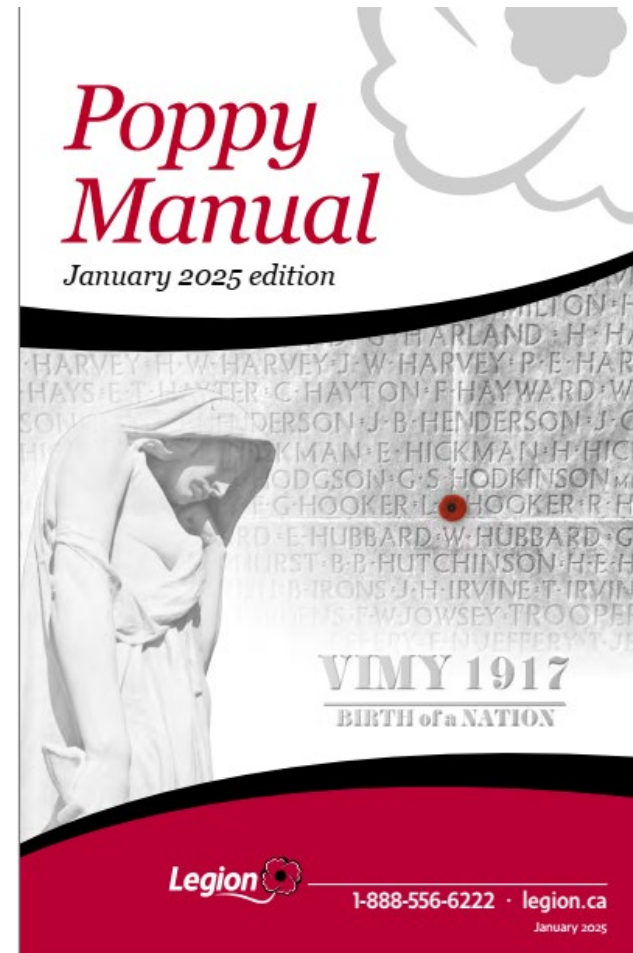
- Type of appliance
- Purpose

 Support of Cadet Units (403ii g) → Include:

- Specific unit name/number
- Exact use of funds (training equipment, Remembrance Day support, Poppy Campaign logistics, etc.)

Review

Your **first** resource when you have questions about the administration of Poppy Funds



Contact Information

Email

Digital submission preferred
lance.jenn@legionbcyukon.ca

Mailing Address

Attn: Poppy Fund Coordinator
Unit 503 – 17665 66A Ave
Surrey, BC V3S 2A7

 Well done! Recognizing awesome work in 2024 Poppy Fund Reporting:

••• Br# 013 Terrace
••• Br# 053 Cowichan
••• Br# 092 Salt Spring
Island
••• Br# 236 Westwold
••• Br# 266 Valemount

Poppy Fund
Statement



🏆 Br# 010 Nanaimo
🏆 Br# 139 Williams Lake

Poppy
Assessment



♦♦ Br# 006 Cloverdale
♦♦ Br# 107 Chase

Poppy
Audit



Thank you for your dedication and timely efforts!

? Questions

Join us at the Meet & Greet 3:00pm – 3:30pm



BRITISH COLUMBIA / YUKON COMMAND

