IAM UNION

9000 Machinists Place
Upper Marlboro, MD 20772-2687

(301) 967-4500
goIAM.org

Office of the General Secretary-Treasurer

October 3, 2026

Re: 2027 **Advanced Financial Officers Seminar**
Schedule and Enrollment

To: Directing Business Reps, Local Presidents and Recording Secretaries in the United States and Canada

Dear Sisters, Brothers, and Siblings:

This is the call for the **Advanced Financial Officers Seminar** to be held **July 25 - 30, 2027**, at the William W. Winpisinger Education and Technology Center in Hollywood, Maryland. Offered by the General Secretary-Treasurer Department this course will include advanced LM2, 990, and Budgeting. **All work will be completed with your Local or District records**.

Criteria For Attending Advanced Financial Officers Seminar

- **Secretary-Treasurer must have attended Basic Financial Officers Seminar**
- **Secretary-Treasurer must have served as Secretary-Treasurer for at least one (1) year prior to attending Advanced Financial Officers Seminar**
- **Local or District qualifies as a DOL LM-2 Filer**
- **Local or District is required to file a 990 Long and has filed a 990 extension with the IRS.**
- **Secretary-Treasurer will need the Local or District laptop with Office 365.**
- **If Admin Staff is attending, they must be accompanied by the Secretary-Treasurer of the Local or District**

If Admin Staff attends, they are not required to have attended Basic Financial Officers Seminar or have been employed for at least one (1) year

Included in this call letter is the IAM policy letter that details tuition, transportation, and curriculum. Use the link below to register members for this program.

Departmental Program Registration Form

Registration must be submitted by May 31, 2027. If you should have any questions about this program, please contact the General Secretary-Treasurer Department at (301) 967-4500.

Thank you for your support of this valuable program for our members. With every best wish, I remain in solidarity,

In Solidarity,

Dora Cervantes
General Secretary Treasurer

DC/PK/BP/alh

cc: IP Bryant

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POLICY NO. XI.1

William W. Winpisinger Education and Technology Center
Tuition, Transportation Subsidy and Curriculum
UPDATED: January 1, 2025

The IAM will pay full transportation costs under certain conditions for all participants selected to attend any IAM sponsored function at Winpisinger Center. These conditions are as follows:

1. The name(s) of participants attending any function must be provided to the Winpisinger Center Administrative Office a minimum of eight (8) weeks prior to the starting date of the function.

2. All transportation (air or rail) will be handled for the participant by the IAM International's designated meetings and travel agent, based on information provided by the member. 21-day Super Saver air or rail tickets will be purchased for each participant selected to attend a program upon the completion of a Travel Request Form.

3. If there is a cancellation of attendance once a non-refundable ticket has been purchased for any reason other than a doctor's excuse due to illness or death of the participant or a member of their family; the cost of the ticket will be billed to the local or district sending the participant once the ticket expires. If the ticket is used at another time to attend a William W. Winpisinger function the local or district sending the participant will be charged any change fees or costs associated with the use of the ticket. This also applies to Business Representatives or General Chairpersons.

4. If a ticket is purchased after the 21-day Super Saver Fare deadline, any difference in the super saver round trip ticket and actual cost of the ticket will be the responsibility of the participant or local or district sending the participant.

5. Participants from Air Transport locals or districts are requested to travel by employer furnished passes. Should the employer refuse to supply positive space passes; participants should contact their local or district for assistance.

6. No reimbursement will be made for tickets purchased by the member or their local or district.

7. Should a participant be required to spend a night while traveling to or from the Winpisinger Center, the cost of such accommodations will not be reimbursed by the IAM International.

8. Taxis, rental cars, limousines, buses, subways, parking, etc. will not be reimbursed by the IAM International.

9. IAM International will bear no travel costs for any dependents.

10. Should a participant elect to drive their own vehicle, they will be reimbursed at the IRS Standard Rate per mile up to a maximum of 1,600 miles round trip or the equivalent of a round trip super saver air fare, whichever is less. Distance will be determined by the member's home address to Hollywood, Maryland.

11. If space permits, carpooling is strongly encouraged when multiple participants from the same local or district are driving. When carpooling, the reimbursement amount will be determined in a manner consistent with Item # 10 above.

Every IAM member attending any function at Winpisinger Center, when the IAM is the primary sponsor, will attend at no charge for his or her room, meals and refreshments.

Depending on space availability, a participant enrolled in a program may bring his or her family for a minimal charge. The family is restricted to the participant's, spouse or partner, and their children who are living at home. Children under the age of 17 must have adult supervision at all times.

Consistent with the requirements of the curriculum, programs will not exceed five days whenever possible, beginning on Sunday and ending the following Friday.

Recruitment for the Leadership Programs will be according to the Official Announcement Packet for the Machinists Leadership and Train-the-Trainer Programs.

Applicants for the Leadership Programs will be enrolled on a first come, first serve basis, and will be based upon the allotments allowed for the number of participants in the specific local or district and / or the General Vice President's territory.

If a local or district applies to send a member for Leadership I, II, Advanced or Train-the-Trainer and all the programs have been filled, that member will be placed on a waiting list by date received for that year. All potential participants remaining on the waiting list at the end of the year will be given first choice of dates for the following year, but must resubmit an enrollment form in a timely manner.

Assignment to staff programs will be on the basis of need and will be assigned by their General Vice President.