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| **Finance Member Profile** |
| **Name** |  |
| **Campus Unit** |  |
| [**Divisional Finance Leader (DFL)**](http://cfo.berkeley.edu/divisional-finance-leaders#dfl) |  |
| **Budget Buddy *(e.g. mentor, peer, manager)*** |  |
| **Who develops and manages your unit’s budget process?** |  |
| **What is your role in your unit’s budget process?** |  |
| **What is your CalPlanning role?**  |  **Planner**  |
|  **CalRptg & HCPRptg** |
|  **CalRptg Only** |

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| [**My Entity Structure**](http://www.bai.berkeley.edu/BFS/BudgetGL/treeReports/UCBDTREE.HTM) **Start at your Org Level of responsibility and work up & down the tree**  |
| **Org Level** | **Entities** |
| **L2, Org** |  |
| **L3, Division** |  |
| **L4, Department** |  |
| **L5, Discussion Group** |  |
| **L6, SubUnit** |  |
| **L7, DeptID** |  |

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| **Unit Profile** |
| **Top 3 Unit Strategies or Goals**  | 1. |
| 2. |
| 3.  |

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| **Key Accounts for your unit** |
| **Top Revenue Sources** |  |
| **Top Expense Types** |  |

|  |  |
| --- | --- |
| **Key Funds Types *(any particular fund restrictions or fund flavors that you typically work with)*** |  |

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| **Unit Complexity** |
| **Components** | **Yes/No** | **If yes, describe** |
| **Capital Projects** | **Y / N** |  |
| **Centers & Programs** | **Y / N** |  |
| **Contracts & Grants** | **Y / N** |  |
| **Faculty** | **Y / N** |  |
| **Pooled Positions****(e.g. GSI/GSR, Lecturers)** | **Y / N** |  |
| **Recharge** | **Y / N** |  |
| **Represented Staff** | **Y / N** |  |