Finance Update
May 2026
David B., Treasurer

The following update is based on the unaudited financial statements for the period that ended 3/31/2026 as well as the 2026 budget approved at the 2026 World Service Conference.

Revenues (Income)
Revenue consists mainly of literature sales and contributions. Other revenue sources include magazine sales, *Mobile App* Daily Reflection subscriptions, and investment gains or losses. Literature sales for March were $276,835, below budgeted expectations, while contributions for March were $221,203, which is also below budgeted expectations. See the table below for March YTD Actuals versus Budget.

Expenses
The largest categories of expenses consist of WSO Staff salaries and associated costs (payroll taxes and benefits), technology support, Conference costs (including interpretation), and office expenses (postage, telephone, stationery, supplies, printing, Canadian office). Expenses for March were $552,751. See the table below for March YTD Actuals versus Budget. We continue to monitor all expenses and reduce them wherever possible.

Investments
Our ample reserve is contained mostly in the Reserve Fund under the careful watch of our investment manager and the Finance Committee. Market conditions in March were difficult, yielding an unfavorable rate of return on the portfolio. The March losses turned the YTD impact in the Reserve Fund to a loss of $168,658. Our investment accounts will continue to be sensitive to market conditions.

Net Increase/(Decrease)
The change in net assets, revenues less expenses, results in a March, YTD operating surplus of $86,024, which is behind budget due to lower revenues than expected.

2026 Results and Budget

	2026 Actuals	2026 Budget
Revenue		
Literature Sales—net	$466,314	$516,804
Contributions	$1,104,743	$1,120,572
Other income	$127,464	$214,630
Total Revenue	$1,698,521	$1,852,006

Total Expenses	$1,612,497	$1,666,252
Change in Net Assets Increase / (Decrease)	$86,024	$185,754

Reflections and Insights
Key trends in the 2025 financial results that we recently discussed with World Service Conference attendees continue into 2026. Bequests from members have helped our performance this year, but we remain behind budget through March. Without those bequests, our revenues would have been less than our expenses, resulting in a deficit. The WSO carefully watches spending while still providing the services that the fellowship asks of the WSO, spending less than the budget as a result. Overall, our total revenue less expenses, or what the accountants call the Change in Net Assets, is positive—a surplus through March. We are grateful for that.

As discussed at the recent World Service Conference, our 2026 budget represents a small increase in total revenues for this year compared to 2025, but that growth rate appears lower than reality because of the large bequests in 2025. Literature is projected to grow by six percent, primarily because of demand for the new *2026-2029 Al-Anon/Alateen Service Manual*, efforts to highlight specific literature, and the full rollout of our eBooks Globally strategy throughout the year. With continued contributions from our members and ongoing prudent management of our expenses, we are projecting a small surplus for 2026—revenues greater than expenses.

Two of our key spiritual principles are captured in our budget: hope and trust. Newcomers as well as current members seeking help to recover from the family disease of alcoholism find hope through the services funded through the budget, including public outreach materials, new literature development, and technology to find meetings. Our budget reflects trust in our members to keep purchasing Conference Approved Literature and making contributions to support these services as well as trust that those dollars will be spent wisely and effectively to provide the services to the members.

Being fully self-supporting through our Seventh Tradition refers to both our direct voluntary contributions to the WSO and purchases of literature, as captured in our budget each year. We can only look to ourselves to fund the services we request of the WSO. As Delegates return from the recent World Service Conference, they carry this message as part of their reports to their respective Area Assemblies as a reminder to our members that this need remains constant in the weeks and months to come so that we can experience the hope and trust that our budget symbolizes.