

**SECRETARY'S  
MANUAL**

THE SUPREME COUNCIL, 33°  
ANCIENT AND ACCEPTED SCOTTISH RITE  
OF FREEMASONRY  
SOUTHERN JURISDICTION  
U. S. A.

THE SUPREME COUNCIL, 33°

1733 Sixteenth Street, NW

Washington, DC 20009-3103

202-232-3579

OFFICIAL TITLE

The Supreme Council (Mother Council of the World) of the Inspectors General Knights Commanders of the House of the Temple of Solomon of the Thirty-third Degree of the Ancient and Accepted Scottish Rite of Freemasonry of the Southern Jurisdiction of the United States of America.

RONALD A. SEALE, 33°  
Sovereign Grand Commander

WILLIAM B. BRUNK, 33°  
Grand Secretary General

WILLIAM G. SIZEMORE, 33°, G.C.  
Grand Executive Director

Revised February 2012

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**NOTE:** Valleys should use this manual in conjunction with the *Sentinel User's Manual* and the *Sentinel User's Manual* and the *Sentinel Step-by-Step Training Guide*.

# Secretary's Manual

## 1. AFFILIATIONS

A. From within the Southern Jurisdiction. The affiliation of a Brother from another Valley within the jurisdiction of this Supreme Council should be reported on Form 660, "Change of Address and/or of Status." Under no circumstances should a Brother be affiliated without his presenting either a Certificate of Good Standing or a Demit from the Bodies to which he belongs. If the Certificate is used for affiliation purposes, the Secretary should fill out, sign, and return the bottom stub to the Valley issuing the certificate, which, upon receiving same, should remove the Brother from its membership rolls by promptly submitting a report of demission through the Sentinel System (preferred) or by submitting a Form 660 report of his demission to the Supreme Council. Failure to do so causes delay at the Supreme Council in processing the Brother's affiliation with the other Valley. The report of affiliation should give the name of the affiliated member's former Valley (in the space for the old address), his current address, and the date of affiliation and levels in the space provided therefor.

B. From Other Jurisdictions. A Brother affiliating with Bodies of our Jurisdiction whose former membership was with Bodies owing allegiance to a Supreme Council other than our own (see "Supreme Councils and Other in Amity with Mother Supreme Council" in the Transactions) is required by our Statutes to present a Demit from his former Bodies and either to purchase the Patent of our Supreme Council, or, if he has such document from another regular Jurisdiction, to have the same officially endorsed. (See *Statutes*, Article XVII, Section 18.) Furthermore, in order to enroll the Brother upon our records properly, it is necessary that you report his affiliation on Form 330, "Statement of Fees and Report of Investitures" (see Exhibit 1B below), giving all information called for

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**Exhibit 1B.** Sample Report of Affiliation of Member from Bodies under Another Supreme Council

**STATEMENT OF FEES AND REPORT OF INVESTITURES (FORM 330)**

from

<u>Baltimore</u> Lodge of Perfection	<u>Baltimore</u> Chapter of Rose Croix
<u>Baltimore</u> Council of Kadosh	<u>Baltimore</u> Consistory
Valley of <u>Baltimore</u>	<u>E Ray Leppo</u> Secretary
Orient of <u>Maryland</u>	Mailed on <u>January 30, 2005</u>

HISTORY	DATES OF INVESTITURE				FEES
	LODGE	CHAPTER	COUNCIL	CONSIST.	
NAME (in full) Gross, Clifford Elton		Affiliated	January 19,	2005, from	
P.O. ADDRESS 1070 Briar Meadow Drive			Cincinnati,	OH Bodies	
CITY AND STATE Catonsville, MD 22350			14°	4-16-68	
DATE OF BIRTH Jan. 3, 1949			18°	4-17-68	
PLACE OF BIRTH Fayetteville, NC			30°	4-17-68	
OCCUPATION Builder, self employed BU			32°	4-18-68	
BLUE LODGE Hampstead #476, Laurel					



thereon except substituting the date of affiliation for the date of investiture, and adding the name of the affiliate's former Bodies and the dates when he received the Degrees in the other Jurisdiction (see Exhibit 1B). The completed Form 330 must include the reporting Valley's identification. Affiliations from other Jurisdictions should be reported on a separate Statement Sheet from initiates. Of course several affiliates from other Jurisdictions may be reported on the same sheet. No fees are required for affiliation. However, if an Affiliation Patent is ordered, the fee for it should be remitted with the report. (See Paragraph 17, "Patents...")

With reference to petitions for affiliation or initiation from Brethren under the Jurisdiction of the Supreme Councils of England, Scotland, or Canada, please refer to the Grand Commander's directives on this subject in the Reference section of this manual.

In order that there may be uniformity in the matter of endorsing the Patents of Brethren who affiliate, it is suggested that the space between the right-hand column and the margin of the Thirty-second Degree Patent be utilized and that the following form be used with corresponding changes in date, location, name of Body and officers to make the same applicable:

Affiliated with \_\_\_\_\_ (Name of Body) \_\_\_\_\_ in the Valley of \_\_\_\_\_,  
Orient of \_\_\_\_\_, on \_\_\_\_\_, 20\_\_.

(Signed by)

\_\_\_\_\_ Registrar

\_\_\_\_\_ M. of Kadosh

This endorsement applies to both affiliations within the Jurisdiction of this Supreme Council and those from other Supreme Councils, except that in the latter case the selection of a suitable space is dependent upon the Patent that the Brother possesses and is, therefore, left to the discretion of the participants concerned. Affiliation endorsements on diplomas or patents of the lower Degrees should be the same as above except for change in name and designation of Body, etc.

## 2. MEMBERSHIP ACTIVITY REPORTS

Membership activity reports are available in the Sentinel system. These reports list all additions to membership (initiations, affiliations, reinstatements), changes of status (deaths, demissions, suspensions), and changes of name or address that were processed during a user-selected date range. The Name/Address Change Report includes a list of members whose *Scottish Rite Journal* has been returned by the Post Office.

## 3. ANNUAL REPORT ON MEMBERSHIP

Annual Reports of all membership activity during the preceding year are provided to each Valley by the Supreme Council by March 1 of each year, and a copy is also provided to the Sovereign Grand Inspector General or Deputy of the Orient. Once the

Annual Report is processed, it will not be redone in order to incorporate minor changes. Such changes will be entered as part of the next year's activity.

#### 4. PER CAPITA ASSESSMENT

An invoice for the year's Per Capita assessment, calculated on 90% of the Valley's total membership as of November 30, will be generated and sent to the Valley early in December, and the invoice for the balance due, by March 15 after Annual Reports are processed. The Per Capita assessment should not be paid in advance of the December billing, but it is due and payable upon receipt of the December invoice. See Paragraph 19, "Fees, Dues..." for the current Per Capita assessment per member in each Body. (See *Statutes*, Article XI, Section 6.)

#### 5. CERTIFICATE OF GOOD STANDING

The *Statutes*, Article XVII, Section 24, provide for the issuance of a Certificate of Good Standing, which may be used in place of a Demit for the purpose of transferring membership from one Valley to another within the Southern Jurisdiction. The Certificate is a document unique to the Southern Jurisdiction and is to be used only between Valleys within our Jurisdiction. It is valid only until the end of the calendar year in which it is issued. By presenting such certificate with his petition, a Brother may apply for affiliation with another Valley within our Jurisdiction. If he is elected, he thereby becomes a member of the Valley with which he filed his petition, and then the Secretary of the affiliating Valley must, without fail, certify such election by completing the bottom stub of the Certificate of Good Standing and mailing it to the issuing Valley. Upon receipt of the completed Certificate stub, the issuing Valley shall, without the formality of issuing a Demit, promptly report the member demitted to the Supreme Council on a Form 660, "Change of Address and/or of Status" (Exhibit 6A below), or through the Sentinel System and remove him from its rolls.

Further, a demission effected by means of a Certificate stub is as valid as one accomplished with a Demit; consequently, when such demission is reported to the Supreme Council, no explanation of how it was affected is necessary—merely report the date of occurrence and levels affected.

#### 6. CHANGE OF ADDRESS AND/OR OF STATUS (FORM 660)

To keep up-to-date membership records, the Grand Executive Director is dependent upon the Valley Secretary to report promptly member changes of address and/or changes of status, either through the Sentinel system or by using Form 660 (Exhibit 6A), which is provided for this purpose.

The Form 660 report should include the Valley's cipher (see Paragraph 65), the member's identification number or old address, and, if applicable, the complete **new address**, including nine-digit zip code. If reporting a change of status for a member, insert the date of occurrence on the line after the applicable type of change, that is, after

"Affiliated," "Reinstated," "Died," "Demitted," "Suspended," etc., as the case may be. The levels of membership affected by the change should be indicated by writing a "1" in the first column and/or a "2" in the second column and/or a "3" in the third column and/or a "4" in the fourth column under "Levels."

**Exhibit 6A.**

**Changes of Address and/or of Status for Members of Bodies Owing Allegiance to  
THE SUPREME COUNCIL, 33°, S.J., U.S.A.  
1733 Sixteenth Street, N.W., Washington, DC 20009**

I.D. Number \_\_\_\_\_

---

(Give name of Brother in full, Degree and without fail, Valley cipher on above line)

Old Address (City, State and ZIP CODE)	Indicate change of status, if any, by "Date of occurrence" in proper space below:																																			
	<table border="1"> <thead> <tr> <th style="padding: 2px;">Date</th> <th colspan="4" style="padding: 2px;">Levels</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">Affiliated _____</td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> </tr> <tr> <td style="padding: 2px;">Reinstated _____</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Died _____</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Demitted _____</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Suspended _____</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Expelled _____</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Date	Levels				Affiliated _____					Reinstated _____					Died _____					Demitted _____					Suspended _____					Expelled _____				
Date	Levels																																			
Affiliated _____																																				
Reinstated _____																																				
Died _____																																				
Demitted _____																																				
Suspended _____																																				
Expelled _____																																				
New Address (Complete with ZIP CODE)																																				

Give addresses in behalf of all members for whom a change in address and/or status is intended. In case of affiliation give also name and location of Consistory of which formerly a member; if from Bodies belonging to another Supreme Council, report should be on Form 330. Form 660

Another reason for reporting changes of address or status promptly is to keep the mailing list of the the *Scottish Rite Journal* up to date. For example, only those changes that are reported by email or regular mail must be received at least two weeks prior to the day the mailing file is pulled can be entered in time to be included in the next mailing of the *Journal*.

All changes of address and/or of status should be addressed to "COMPUTER SERVICES, THE SUPREME COUNCIL, 1733 - 16TH STREET, NW, WASHINGTON, DC 20009-3103" so that changes are routed to the proper department without delay. This office will furnish Form 660s (Change of Address and/or of Status) on request. (See Paragraph 22, "Blank Forms.")

**7. MULTI-MEMBER CHANGES OF ADDRESS OR CHANGES OF STATUS REPORTS**

In lieu of preparing individual Form 660s to report their changes of address or their changes in membership status, Valleys may prepare multi-member reports on 8-½" x 11" sheets so long as they adhere to the following requirements:

- a. Reports must be double-spaced;
- b. Reports must include member ID numbers;
- c. Each page must be identified by Valley (cipher);
- d. Each report must include only one type of change, that is, all suspensions, or all deaths, or all changes of address, and the heading on the report should identify the

type of change. Under no circumstances should different types of changes be combined on the same multi-member report sheet;

- e. If reporting changes in membership status, names must be arranged in alphabetical order on the sheet; changes of address may be listed in any order;
- f. When printing the report, use a font size 12 and a dark ribbon or fresh ink cartridge so that the print is easy to read;
- g. Names may be arranged in two columns on the page instead of horizontally across the page.

## 8. DEMISSION

A demission should be reported as promptly as possible to the Supreme Council on a Form 660, "Change of Address and/or Status" or through the Sentinel System. This is important because the Supreme Council cannot process an affiliation until it receives a report of demission from the member's previous Bodies.

When an affiliation is accomplished through the use of a Certificate of Good Standing, the bottom stub must be completed and returned promptly to the Valley that issued the certificate because the completed certificate stub triggers the member's demission from his previous Valley. That is, upon receiving the completed stub, the Valley must remove the Brother from its rolls and promptly report him demitted to the Supreme Council.

If within two weeks after the Supreme Council receives a report of affiliation, it has not received a report of demission from the Brother's former Bodies, we must notify the Secretary of the member's former Valley that, unless we hear to the contrary by a stated date, we will process a demission for the Brother, effective the same date as his affiliation in the new Valley. This procedure necessitates additional work, expense, and delay.

## 9. RE-AFFILIATION

If a Brother who has demitted from a Valley later wishes to reactivate his membership therein, the procedure to be used is re-affiliation, not reinstatement. (Reinstatement is the procedure used to restore a Brother who was suspended.) He must present his Demit when petitioning to re-affiliate. When the Brother is re-affiliated on our master file, he will receive a new ID number. The Valley should report his re-affiliation on the Form 660, "Change of Address and/or of Status" report, using the "Affiliation" line. Affiliations cannot be reported using the Sentinel system.

## 10. SUSPENSION

Written reports of year-end suspensions must be received by the Supreme Council no later than January 11, and Sentinel submissions must be received no later than January 29. Otherwise these status changes may not be included on the Valley's annual report of membership activity in the prior year, and, consequently, the Valley will be assessed Per Capita on members who were subject to suspension.

The Supreme Council shall process suspensions in the members' records as NPD (nonpayment of dues) unless the report of suspension indicates OC (other causes). If a suspended member becomes eligible for reinstatement, he will be reinstated on the master file with his former ID number if his record was not deleted in the past from our master file. The Valley should report his reinstatement on the Form 660, "Change of Address and/or of Status" report or through the Sentinel System if he has an existing Sentinel record (see the Sentinel Users Manual).

If a Brother whose levels of membership are split between Valleys is suspended in his lower level/s, he becomes automatically suspended in his higher levels as well. This office will process his suspension in all of his levels.

## 11. REINSTATEMENT

Reinstatement is the procedure used to restore to good standing a Brother who was suspended. If a suspended member is reinstated, the Valley should report his reinstatement on the Form 660, "Change of Address and/or of Status" report or through the Sentinel system if the member has an existing Sentinel record (see the Sentinel Users Manual). He will be reinstated on the master file with his former ID number if his record was not deleted in the past from our master file.

## 12. NAMES IN FULL

The Supreme Council requires that the full legal names of members be given on all reports, orders for Patents, applications for Ladies' Certificates, etc. The full name of a member is entered on the master file just as it was reported on the Valley's Statement of Fees and Report of Investitures. Therefore, the member's full name and unique identification number, if known, should be given on all reports and in correspondence to the Grand Executive Director to ensure correct member identification and accurate records.

## 13. TYPING REPORTS

In order to minimize the chances of information being illegible or misread, all reports and related correspondence should be typed or computer printed insofar as possible. If typed, use ribbons that produce a clear impression and clean the type so that the "e"s do not look like "o"s, and all other letters can be easily read. This is important in order for us to issue correct Patents, etc.

## 14. STATEMENT OF FEES AND REPORT OF INVESTITURES (FORM 330)

It is not necessary to submit a Form 330, "Statement of Fees and Report of Investitures," report after the conferral of each Degree, nor separately by Lodge, Chapter, Council, or Consistory. Instead, the report of initiations should be submitted at the conclusion of a Reunion or a series of Degrees, except when a Reunion or series of

Degrees extends into the next calendar year. In such a case it is essential that initiations that occurred before the end of the year be reported promptly to the Supreme Council so that they can be included in that year's Annual Report.

The Statement of Fees and Report of Investitures should, however, be prepared and submitted promptly after the close of a Reunion or at the conclusion of a series of Degrees. For example, if a Valley has only a Lodge of Perfection, its report should be submitted promptly after the conferral of the Fourteenth Degree, because the initiates take their higher Degrees in another Valley, and the Supreme Council cannot process the latter initiations until it receives the report of their initiation in the Lodge.

Changes of status should not, under any circumstances, be reported on Form 330, "Statement of Fees and Report of Investitures" along with initiations; changes in membership status should be reported separately on Form 660, "Change of Address and/or Status." Nor should affiliations from Bodies under the jurisdiction of another Supreme Council be reported on the same Statement Sheet with initiates. Rather these affiliations should be reported on a separate Statement Sheet. Of course, several affiliates from other Jurisdictions may be reported together on the same Statement Sheet.

The initiation of a courtesy candidate, a Brother upon whom a Valley confers Degrees as a courtesy to another Valley, is not to be reported by the conferring Valley. The Valley to which he belongs is responsible for reporting his initiation and remitting the required fees.

Form 330s should be submitted using the Sentinel system (see the *Sentinel Step-by-Step Training Guide* for instructions). However, if you cannot use the Sentinel system, or if you are reporting additional Degrees, follow these instructions.

Numbers (1) through (14), shown on Exhibit 14A (sample Form 330) on the next page, are referred to in the instructions following.

Arrange names alphabetically by the surname, then first name, then middle name. If, however, a name is inadvertently omitted or an initiate added at the last minute, it is not necessary to redo the report; the out-of-place name/s may be added to the last sheet.

Names must be reported in full, but if a Brother's name includes an initial only, it should be put in parentheses (1).

The Supreme Council uses a "First Name, Middle Initial, Last Name" format when printing a member's name on the *Scottish Rite Journal*, ID cards, labels, etc. If a Brother prefers to have his name printed in a different manner from the above, such as First Initial, Middle Name, Last Name, please indicate his preferred name in parentheses following his full name. It may run over into the blocks set off for Bodies and dates of investiture (14).

**Exhibit 14A STATEMENT OF FEES AND REPORT OF INVESTITURES (FORM 330)**

from

Baltimore Lodge of Perfection  
Baltimore Council of Kadosh  
 Valley of Baltimore  
 Orient of Maryland

Baltimore Chapter of Rose Croix  
Baltimore Consistory  
E Ray Leppo Secretary  
 Mailed on November 30, 2004

DATES OF INVESTITURE

HISTORY

LODGE CHAPTER COUNCIL CONSIST. FEES

LAST NAME, FIRST MIDDLE	Date	Date	Date	Date	Amount
STREET ADDRESS					
CITY, STATE, ZIP CODE					
DOB (Date of Birth)					
POB (Place of Birth) City and *State *if in a different State.					
OCC Specific occupation and code					
BLUE LODGE Name & No., City where located & State* (Leave one blank row between records.)					
LN, FN MN Adamson, Johnathan (Q.) (1)	Belongs to	Belongs to	11/12/04	11/12/04	\$26.00
ADRS 1234 Cherry Lane	Salisbury	Salisbury	(11)	(11)	
CTY ST ZIP Sommerville, MD 21901-1234 (4)	(7)	(7)			
DoB 01/15/49					
PoB Cumberland (3)					
OCC Welder (6) MT (13)					
BL LDG Silver Trowel #714, Cole Springs (2)					
LN, FN MN Bowers, Kermit Gregory (K. Gregory) (14)		11/12/04	"	"	\$26.00
ADRS 1010 Forward Avenue			(12)	(12)	
CTY ST ZIP Rockville, MD 20736-1010	(10)				
DoB 03/19/47					
PoB Kennewick, WA					
OCC Shoe Salesman SA					
BL LDG Farrington #243, Marlow, VA (5)					
LN, FN MN Davis, Wesley Dean	Reinstated	"	"	"	\$26.00
ADRS 4094 Hampton Downs Way	9-10-1998				
CTY ST ZIP Frederick, MD 20773-0307	(8)				
DoB 10/3/56					
PoB Westminster					
OCC Truck Driver TR					
BL LDG Westminster #765, Westminster					
LN, FN MN Jamison, Keith Byron	11/12/04	"	"	"	\$26.00
ADRS 5 W Haven Boulevard					
CTY ST ZIP Baltimore, MD 21378-8754					
DoB 6/6/61					
PoB Hartford, CT					
OCC Computer Programmer DA					
BL LDG Bradford #757, Forestville					
LN, FN MN Lamont, Henry Joseph	Affiliated	Affiliated	"	"	\$26.00
ADRS 677 Turkey Branch Pkwy.	on 7-17-94	on 7-17-94			
CTY ST ZIP Hampstead, MD 21714-5954	from	from			
DoB 2/28/52	Tampa, FL	Tampa, FL			
PoB Jacksonville, FL	(9)	(9)			
OCC Lawyer AT					
BL LDG Blackwell #495, Owings Mills					

It is essential to report specific address, i.e., house number and name of street; post office box or route number; city, state and 9-digit zip code, because members are placed on the mailing list of the *Scottish Rite Journal*.

Place of birth should be specific, that is, town or nearest post office, and state or country. (The city or town through which mail is received should be used for place of birth.) This applies to foreign-born as well as native-born members. Naming the country alone is not sufficient.

Specific occupation, profession, or kind of business should be given, such as merchant, clerk, salesman, lawyer, doctor, druggist, barber, banker, etc.—whether owner or employee; if retired, give former occupation. This is necessary not only for future identification, but for assurance that the occupation is or was a reputable one. So instead of "Pennsylvania Railroad conductor," use "railroad conductor." If he is a bookkeeper for the Pacific Gas and Electric Co., state "bookkeeper" (6). The Supreme Council is not interested in the name of the firm or company, only in the specific occupation or position held in same. In addition to the specific occupation, give the most appropriate occupation code (13). See Paragraph 16, "Occupation Codes."

If a Brother belongs to lower Bodies in another Valley, that fact should be noted (7). When a Brother who is suspended in a lower Body or Bodies reinstates and then proceeds to take higher Degrees, that fact should be indicated (8). Similarly, when one who is demitted in a lower Body or Bodies affiliates and then takes the higher Degrees, that too, should be indicated (9).

If a Brother was previously reported to the Supreme Council as having received the Lodge Degrees, etc., the Lodge Degrees block should be left blank (10). The dates on which he received the 18°, 30°, and 32° should be placed in the proper blocks (11). If the dates are the same for successive Brethren, or the same for the entire Class, they need be shown only in the top blocks on each page and dittoed ("") down the page (12).

Because the information on these Statement Sheets becomes part of the Supreme Council's membership records and is also used to print the 32° Patents, these reports should be checked and verified prior to submission. Having everything complete and correct facilitates Patents being ordered promptly and printed correctly, and initiates being placed on the mailing list of the *Scottish Rite Journal* promptly.

Please bear in mind that the *Statutes of our Supreme Council* do not permit higher Degrees to be conferred upon anyone not in good standing, or on those who have received the lower Scottish Rite Degrees and belong to lower Bodies in a Jurisdiction other than the Southern Jurisdiction, U.S.A. In the former instance, such Brethren must first reestablish their good standing. In the latter instance, they must become affiliated in the lower Degrees with Bodies in our Jurisdiction before they are eligible to petition for the higher Degrees. (See *Statutes*, Article XVII, Sections 17 through 22; and directives regarding members of Bodies under the Supreme Councils of England, Scotland, or Canada in the Reference section in the back of this manual.)

Valleys should use the "Generate a Form 330" function to create and print a Form 330. If Sentinel is not available, Valleys may computer generate the Form 330 report so



long as it supplies the required information arranged in the format to which our data-entry operators are accustomed. See Exhibit 14A for a sample of the recommended format for a computer-generated Form 330.

Candidates taking additional Degrees cannot be submitted electronically through the Sentinel System on Form 330. These candidates must be recorded manually on a Form 330 and reported to the Supreme Council by regular mail.

## 15. INCOMPLETE REPORTS

This office will contact the Secretary if any report is incomplete. This is not done for the purpose of finding fault but to make sure records conform to the requirements of the Supreme Council, which will keep the members' records in such form as will best serve them and our Valleys. Thus, when missing information is requested, prompt attention and response are solicited.

## 16. OCCUPATION CODES

A member's occupation code is included in his computer record.

AB - Automotive and boat - manufacture, sales, service

AC - Accounting, certified public accountant, bookkeeper, comptroller

AD - Advertising, public relations

AR - Architecture

AS - Armed Services

AT - Attorney, lawyer, judge, legal profession, law student

AV - Aviation, pilot, steward, airport worker

BA - Barber, barber shop/beauty parlor owner/operator, hair stylist, cosmetologist, etc.

BK - Banking: officer, teller; loan company employee, etc.

BL - Building, construction: carpenter, crane operator, sheet metal worker, millwright, pipefitter, etc.

CA - Creative arts: musician, actor, painter, dancer, etc.

CL - Clerical worker: clerk, secretary, file clerk, registrar

DA - Data processing: programmer, computer technician, analyst

DS - Disabled

ED - Education: teacher, principal, guidance counselor, etc.

EN - Engineering: engineer, surveyor, draftsman, etc.

FH - Funeral home director, embalmer, hearse driver

FI - Fireman, fire service  
FL - Florist  
FM - Farming, ranching  
FO - Food: production, distribution, sales; grocer, etc.  
FR - Forestry: forest ranger, tree surgeon, arborist, lumberjack, lumber company employee  
GO - Government, highway construction, inspector, Justice of the Peace  
HO - Hotels, motels: clerks, bellhops, etc.  
IN - Insurance: agent, salesman, underwriter, claims adjuster, etc.  
JE - Jeweler, clock/watchmaker  
LA - Library worker  
LB - Laborer, warehouseman, service station attendant, janitor, dispatcher, roust-about, exterminator, etc.  
LP - Utilities (electricity, water, telephone), heating, air- conditioning--plumber, electrician steamfitter, etc.  
LS - Landscaping  
LW - Law enforcement, policeman, security guard, bail bondsman  
MA - Machinist, boilermaker  
MC - Mechanic  
ME - Medical profession, pharmacy, dentistry, nursing, health and human services, social worker, optometrist, veterinarian  
MG - Business: administrator, manager, consultant, owner, coordinator, estimator, timekeeper, etc.  
MI - Ministry  
MM - Maintenance man, repairman  
MN - Manufacturing, tool and die maker, factory worker  
MT - Metal worker, metallurgist, miner, welder, coin dealer, gun dealer, locksmith, etc.  
MU - Museum worker  
NV - Investments and finance: counselor, broker, etc.  
OP - Oil production: oil driller, well tender, etc.  
PA - Painting, decorating, furniture refinishing, upholstering  
PG - Paper, glass and plastics manufacturing, etc.  
PH - Photography  
SP - Sports

PR – Personal Representative

PU - Publishing, journalism, printing, writing, bookbinding, etc.

RA - Radio, television, movie production: commentator, etc.

RE - Real estate: realtor, salesman, appraiser

RS - Restaurant worker, owner, manager, waiter, etc.

RT - Retired (see Note below) NOT SUFFICIENT ALONE

SA - Salesman, auctioneer, appraiser, merchant

SC - Science, scientific instruments, chemistry, astronomy

SH - Shipping, mariner, longshoreman

ST - Student

SV - Supervisor, superintendent

TA - Travel agent, tour guide

TE - Technician

TL - Tailor

TR - Transportation: railroad engineer, truck driver, teamster, bus driver, etc.

UN – Unemployed

NOTE: If the member is retired, please add the RT after the code of the occupation from which he is retired.

Example: a retired banker should be coded BKRT

## 17. PATENTS, CERTIFICATES, TUCKS

Thirty-second Degree: original, including tuck, \$8.00;  
duplicate, including tuck, \$5.00.

32°, KCCH: original, including tuck, no charge;  
duplicate, including tuck, \$5.00.

33° Inspector General Honorary:  
original, including tuck, comes with Degree;  
duplicate, including tuck, \$5.00.

Lady's Certificate: original, including tuck, \$5.00;  
duplicate, including tuck \$5.00.

Affiliation and corrected patents: \$5.00.

Tucks: \$3.00 each.

If the Patent or certificate is issued incorrectly and was not the result of an error on the Valley's Form 330 report, the Supreme Council will replace the Patent at no charge to the Valley. If the error was the Valley's, it should remit the fee for a corrected Patent along with its order for a replacement.

Duplicate patents are issued upon request. The fee for a duplicate Patent should be included with the request.

## 18. CERTIFICATE OF MEMBERSHIP

Secretaries may supply a newly-invested Brother with a certificate to be used until the Supreme Council has issued him a Patent. A suggested form follows:

ANCIENT & ACCEPTED SCOTTISH RITE  
OF FREEMASONRY  
SOUTHERN JURISDICTION, U.S.A.

CERTIFICATE OF MEMBERSHIP  
(Valid only for twelve months from  
date of issue.)

The *Statutes*, Article XVII, Section 32 state:

\*\*\* a Body which has conferred Degrees may furnish to the member receiving the same a certificate showing his investiture with the Degrees thus conferred. This certificate will, for twelve months, entitle the member to be received and acknowledged as having received the Degrees stated on his certificate.

This is to certify that Brother \_\_\_\_\_, who received the Scottish Rite Degrees as follows:

14° on \_\_\_\_\_,            18° on \_\_\_\_\_,  
30° on \_\_\_\_\_,        32° on \_\_\_\_\_,  
and whose present address is

\_\_\_\_\_ is a member in good standing (and possesses all the Degrees of each unless otherwise specifically stated) of the following named Bodies of this Rite, sitting in the Valley of \_\_\_\_\_, Orient of \_\_\_\_\_

Viz.:

- \_\_\_\_\_ Lodge of Perfection
- \_\_\_\_\_ Chapter of Rose Croix
- \_\_\_\_\_ Council of Kadosh
- \_\_\_\_\_ Consistory

Dated \_\_\_\_\_, 20\_\_

(SEAL)

(signed) \_\_\_\_\_, Secretary

Address \_\_\_\_\_

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19. SUPREME COUNCIL FEES, DUES, ASSESSMENTS

LODGE OF PERFECTION

Letters Temporary .....	\$60.00
Permanent Charter .....	70.00
1 <i>Ritual</i> (on CD).....	(Loaned)
1 <i>Liturgy</i> (4°-14°) .....	12.50
1 <i>Legenda</i> (4°-14°) .....	12.50
1 <i>Forms and Traditions of the Scottish Rite</i> .....	14.00
3 <i>Funeral Ceremony and Lodge of Sorrow</i> .....	7.00
1 <i>Grand Constitutions</i> .....	29.00
1 <i>Morals and Dogma</i> (Valley orders for new candidates).....	25.00
1 <i>Morals and Dogma</i> (other).....	75.00
1 <i>Synopses and Communication of the Degrees</i> .....	(Loaned)
1 <i>A Bridge to Light</i> (ordered by Valley).....	5.00
Supreme Council Fee on Initiate, Lodge of Perfection Degrees .....	8.00
Per Capita Assessment, Annual, Lodge of Perfection.....	
(2012 payable 1/13 - \$7.20; 2013 payable 1/14 – \$8.00)	

CHAPTER OF ROSE CROIX

Letters Temporary .....	\$75.00
Permanent Charter .....	100.00
1 <i>Ritual</i> (on CD).....	(Loaned)
1 <i>Liturgy</i> (15°-18°) .....	12.50
Supreme Council Fee on Initiate, Chapter of Rose Croix Degrees .....	5.00
Per Capita Assessment, Annual, Chapter of Rose Croix .....	
(2012 payable 1/13 - \$3.60; 2013 payable 1/14 – \$4.00)	

COUNCIL OF KADOSH

Letters Temporary .....	\$75.00
Permanent Charter .....	100.00
1 <i>Ritual</i> (on CD).....	(Loaned)
1 <i>Liturgy</i> (19°-30°) .....	12.50
1 <i>Legenda</i> (19°-30°) .....	12.50
Supreme Council Fee on Initiate, Council of Kadosh Degrees .....	5.00
Per Capita Assessment, Annual, Council of Kadosh.....	
(2012 payable 1/13 - \$3.60; 2013 payable 1/14 – \$4.00)	

CONSISTORY

Letters Temporary .....	\$90.00
Permanent Charter .....	120.00
1 <i>Ritual</i> (on CD).....	(Loaned)
1 <i>Legenda</i> (32°).....	12.50
Supreme Council Fee on Initiate, Consistory Degrees.....	5.00
Per Capita Assessment, Annual, Consistory .....	
(2012 payable 1/13 - \$3.60; 2013 payable 1/14 – \$4.00)	

## 20. REDUCED INITIATION FEES - CANDIDATES UNDER 31 YEARS OF AGE

In 1972, the Supreme Council provided a provision, pursuant to the *Statutes of the Supreme Council*, including, among others, the provisions of Article IV, Section 26, that allows the Sovereign Grand Inspectors General and Deputies of the Supreme Council, in their discretion, to reduce by not more than one-half the fees for young men who petition for, are elected, and in due course complete our Degrees prior to their thirty-first birthday. In these cases the Subordinate Bodies shall be required to pay the Supreme Council only the proportionate fees as follow:

Lodge of Perfection	\$ 6.00 instead of \$ 8.00
Chapter of Rose Croix	\$ 3.00 instead of \$ 5.00
Council of Kadosh	\$ 3.00 instead of \$ 5.00
Consistory	\$ 3.00 instead of \$ 5.00
32 Patent	<u>\$ 7.00 instead of \$ 8.00</u>
Total	\$22.00 instead of \$31.00

## 21. REMITTANCES, ETC.

All orders and reports should be accompanied by the required fees. (See *Statutes*, Article XI, Secs. 5 and 6.) No books shall be sold except for cash (see Article XII, Section 8), excluding VISA card purchases. Checks should be made payable to "THE SUPREME COUNCIL, 33°," unless it is specified to do otherwise, and all envelopes containing checks should be addressed to "THE SUPREME COUNCIL, 33°, 1733 - 16th Street, NW, Washington, DC 20009-3103," including checks in payment of Membership Services (Valley billing service) invoices and checks payable to the Scottish Rite Foundation.

In every case payments should be accompanied by a letter or memo explaining what it is for, or the purpose should be indicated on the memo line of the check itself. Checks in payment of an invoice should include the number of the invoice.

It is especially important that checks or drafts bear the signature/s of the proper officer/s. This will avoid inconveniences. Checks are acceptable at face value only if banks do not make a charge for cashing them.

If different types of mail (checks, Form 330s, Form 660s, Lady's Certificate applications, etc.) are combined in one large envelope, the envelope should be addressed to "THE SUPREME COUNCIL" and the items inside should be categorized in smaller envelopes labeled according to the enclosures, such as:

MEMBERSHIP CHANGES  
VALLEY BILLING PAYMENTS/CHANGES  
LADY'S CERTIFICATE APPLICATIONS

## 22. BLANK FORMS FURNISHED BY THE SUPREME COUNCIL

- \* Application for Dual Membership from Northern Masonic Jurisdiction (See Exhibit 44D)
- \* Application for Dual Membership from the Philippines (See Exhibit 44E)
- \* Application for Lady's Certificate. (See Paragraph 37)  
Certificate of Good Standing. (See Paragraph 5)
- \* Change of Address and/or of Status, Form 660. (See Paragraph 6)  
Degree Blanks: Fifth; Eighteenth; Twenty-seventh, and Thirtieth.  
Demit. (See Paragraph 8)
- \* Dual Membership Form 440. (See Exhibit 44C)  
Dues Notices (includes outer and return envelope). Billed at cost  
Identification (Dues) Cards. (See Paragraph 23)
- \* Statement of Fees and Report of Investitures (Form 330). (See Paragraph 14)  
25-Year Membership Certificates. Valleys are invoiced for shipping charges.  
(See Paragraph 35)

Read carefully and follow the instructions on all the forms.

- \* A computerized version of these forms is available upon request.

## 23. IDENTIFICATION (DUES) CARDS

\*The Grand Executive Director shall have identification cards printed for all active members on the Valley's roll and shipped to the Valley Secretary by August 1 of each year. The cards will be sorted in alphabetical order, printed with member name, Degree and identification number. A supply of blank cards will also be included. (See Paragraph 22, "Blank Forms" and *Statutes*, Article XVII, Sections 27 and 28.)

\*This schedule does not apply to Membership Services Valleys that elect to have dues cards mailed directly to the member along with his dues statement. The dues card/dues statement mailing will take place during August or September. Participating Valleys will be notified each year regarding that year's mailing date.

Occasionally Brethren neglect to sign their identification cards or Patents in the space provided thereon for that purpose. Because this is a serious matter, the members should be cautioned to sign these documents immediately upon receiving them.



## 24. MEMBER TYPE CODES

The member type code is included in the member's computer record.

G5 - Belongs to lower Body/Bodies only.

M5 - 32° member belongs to all four Bodies

F5 - 32°, Knight Commander of the Court of Honour

D5 - 33°, Inspector General Honorary

A4 - Sovereign Grand Inspector General

A7 - Deputy of the Supreme Council

X1 - A complimentary on the Valley's mailing list but not a member of the Valley. (See Paragraph 29, \*) X1 records are being phased out and no new X1 nonmembers are being added. Valleys are encouraged to add new or existing nonmember records to the Sentinel system.

B4 - Secretary of a Valley with four Bodies. There is a B4 "SECY" record on the master file for every Valley with four Bodies. It is for Supreme Council mailing purposes only and is not counted in the membership totals.

B7 - Secretary of a Valley with lower levels only. There is a B7 "SECY" record on the master file for every Valley with one, two, or three Bodies only. It is for Supreme Council mailing purposes only and is not counted in the membership totals.

## 25. MEMBER STATUS CODES

A member's Status Code is included in his computer record. The codes are:

B – Member prior to approximately 1971

C – Initiation of a member who already has an active identification number  
(Lower-level/s member taking additional Degrees)

D – Initiation (New Member)

E – Affiliation from another jurisdiction, either within or outside the  
Southern Jurisdiction, requiring a new identification number

F – Demission (resignation of membership)

G – Reaffiliation requiring a new identification number

H – Affiliation of a member who already has an active identification number

J – Suspension for nonpayment of dues

K – Suspension for other causes

L – Expulsion

M – Reinstatement of a member who has an active identification number

N – Reinstatement requiring a new identification number

O – Death

## 26. ONLINE MEMBERSHIP MANAGEMENT SYSTEM

In 2002 the Supreme Council conducted a review of the existing membership management system for the purpose of learning how we could maintain affordable staffing levels, handle massive amounts of information with a minimum of resources, and provide increasing service and value to our members - in short, use it more effectively to support our fraternal mission. Our goal was to maintain the efficiency and reliability of our existing networked system while adding flexibility and new features made possible by the advances in information technology. After much study and consideration, we decided to use Patriot Software's data management system, which had already demonstrated its adaptability for membership management by fraternal organizations. This new system, which was implemented on November 1, 2002, streamlines procedures, improves data processing and reporting, and provides new and exciting features for our Orients and Valleys.

In 2004 the Supreme Council expanded its data management system to include software that allows Valleys to access membership data in the Supreme Council's master database. Orient and Valley officers and staff may view and update membership records through Sentinel, an online membership data management system designed specifically for Scottish Rite Valleys. All Valleys will use the Sentinel System to process dues payments, address changes, and statistical changes such as deaths, demits, and suspensions.

For Sentinel-related issues, contact Tammy Fannin, Manager of Computer Services ([tfannin@scottishrite.org](mailto:tfannin@scottishrite.org)), or Martha Bennett, Supreme Council Computer Services ([mbennett@scottishrite.org](mailto:mbennett@scottishrite.org)).

## 27. MEMBER'S COMPUTER RECORD

The Sentinel system makes it possible for a Valley to access its members' records on the Supreme Council's master file. The following sections contain a sampling of the screens used in Sentinel.

### 27A. SAMPLE OF MEMBER "PROFILE" SCREEN IN "SENTINEL"

INFORMATION SHOWN ON MEMBER'S "PROFILE" SCREEN INCLUDES:

Field/Button Name	Field/Button Information	Field/Button Description
Prefix	Optional Field	Select a prefix from the drop-down box
First	Required Field	Records the first name
Middle	Optional Field	Records the middle name
Last	Required Field	Records the last name
Nickname	Optional Field	Records the nickname. Used as the Preferred Name in Patriot.
Preferred Name	Required Field	The Preferred Name appears in large letters at the top of the People Maintenance screens.

<b>Field/Button Name</b>	<b>Field/Button Information</b>	<b>Field/Button Description</b>
Suffix	Optional Field	Select a suffix from the drop-down box
Valley Status	Optional Field	This field defaults to Candidate, but you may change the Valley Status code using the drop-down box. Options in the Valley Status drop-down box can be edited using the <u>Valley Status Code Maintenance</u> screen.
On	Optional Field	Records the effective date of the current Valley Status code
S. C. Member Type	Informational Field	Displays the Supreme Council membership type.
Dues Status	Informational Field	Displays the current dues statement code
Dual/Plural	Informational Field	Will display the Dual/Plural Code
#10 Envelope	Button	Prints a single envelope
Label	Button	Prints a single label
Home	Optional Field	Records the home phone number
Work	Optional Field	Records the person's work phone number
Cell	Optional Field	Records the person's cell phone number
Reunion Number	Optional Field	Records the number of the Reunion
Reunion Name	Optional Field	Records the name of the Reunion
E-mail	Optional Field	Records the e-mail address
1 <sup>st</sup> and 2 <sup>nd</sup> Line Signers	Optional Field	Records the signer names
Spouse	Optional Field	Records the spouse's name

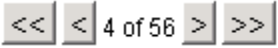
27B. A member's Profile screen contains links to other screens. The Other Member Info screen contains dues, occupation, Blue Lodge, and other information specific to the member.

**SAMPLE OF MEMBER'S "OTHER MEM INFO" SCREEN IN "SENTINEL**

Members		Dues		Officers/Volunteers		Valley		Data Offloading		Admin		Logout	
Profile		Other Addresses		Other Mem Info		Offices/Volunteer/Groups		Donations		Text Notes			
Member ID: 10363852		H. G. Wells						Return		<< < 3 of 10 > >>		Save	
<b>Job Information</b>													
Employer:						Job Title:		Author					
Job Status:		▼				Job Code:		Creative Arts				▼	
<b>User Defined Fields (Valley administrators: Set field descriptions under "Admin")</b>													
Favorite Color						Inseam							
License Plate						Sample Label 4							
Sample Label 5						Sample Label 6							
Sample Label 7						Sample Label 8							
Sample Label 9						Sample Label 10							
<b>Member Dues Summary</b>						<b>Blue Lodge Information</b>							
Current Dues Year:		0				Lodge Name:							
Current Statement Code:						Lodge Number:							
Current Status Code:						Lodge City:							
Current Year Total Paid:		0				Lodge State:		▼					
Current Year Due Balance:		0											
Past Due Balance:		0											
Total Balance Due:		0											
Show Yearly Dues Details													

**INFORMATION SHOWN ON MEMBER'S "OTHER MEM INFO" SCREEN INCLUDES:**

Field/Button Name	Field/Button Information	Field/Button Description
Member ID	Search Criterion	Use this field to search for a person by Member number
Return Button	Action Button	Click this button to return to the most recent search results screen.

Field/Button Name	Field/Button Information	Field/Button Description
	Action Buttons	<p>A button with a single forward arrow (&gt;) moves you forward one record. A button with a double forward arrow (&gt;&gt;) moves you to the last record in the record set. A button with a single backward arrow (&lt;) moves you back one record. A button with a double backward arrow (&lt;&lt;) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.</p>
Save Button	Action Button	Use this button to save a new record or changes to an existing record.
Employer	Search Criterion	Use this field to search for a person by current employer
Job Status	Search Criterion	Select the job status from the drop-down box
Job Title	Search Criterion	Use this field to search for a person by job title
Job Code	Search Criterion	Select the job code from the drop-down box
10 User-Defined Fields	Search Criterion	Use this field to search for a person by the user-defined field data item
Current Dues Year	Search Criterion	Use this field to search for a person by the current four-digit dues year
Current Statement Code	Search Criterion	Use this field to search for a person by the current statement code
Current Status Code	Search Criterion	Use this field to search for a person by the current dues status code

<b>Field/Button Name</b>	<b>Field/Button Information</b>	<b>Field/Button Description</b>
Current Year Total Paid	Search Criterion	Use this field to search for a person by the current amount of money paid for the year
Current Year Due Balance	Search Criterion	Use this field to search for a person by the current amount of money owed for the year
Past Due Balance	Search Criterion	Use this field to search for a person by the current amount of the past due balance
Total Balance Due	Search Criterion	Use this field to search for a person by the current amount of the total balance owed
Lodge Name	Search Criterion	Use this field to search for a person by Blue Lodge name
Lodge Number	Search Criterion	Use this field to search for a person by Blue Lodge number
Lodge City	Search Criterion	Use this field to search for a person by Blue Lodge city
Lodge State	Search Criterion	Select the Blue Lodge state from the drop-down box

## 28. VALLEY MEMBERSHIP SERVICES

The Supreme Council offers a service to Valleys for billing their annual membership dues and for maintaining their members' dues records easily and efficiently. Valleys can enjoy the benefits of computerized billing by using this service and sharing the costs. Each Valley defines its own dues structure and has exclusive control of its members' billing records. Basically the service generates dues notices for the Valley's members based on the billing and payment information supplied by the Valley. Member dues notices are printed, zip code sorted, and mailed at the non-profit bulk postage rate.

A. System Description. Enrolling in the Valley Membership Service consists of two main parts: the initial set up phase and, once this has been completed, recurring operations.

1. Set up. The set up phase is a one-time procedure to establish each member's dues record.

2. Recurring Operations. Each Valley should enter dues payments in the Sentinel System.

The **three** main Valley Membership Services processings are:

<u>August/September</u>	Initial Dues Notices Printed & Mailed (dates may vary) Paid/Unpaid Roster Supplied;
<u>January</u>	Year-End Paid/Unpaid Roster Supplied;
<u>November and/or March</u>	Follow-up Dues Notices Printed & Mailed; Paid/Unpaid Roster Supplied.

Valleys may have follow-up notices run in November and March, if they wish.

Valleys may elect to have their current member and Life Member dues cards mailed directly to the member along with his dues statement by choosing Option 1 on the ID Card Authorization Form mailed to each Membership Services Valley prior to the annual dues processing.

3. Computer Outputs:

a. Sentinel Reports. Dues-related reports are generated through Sentinel. Valleys have the option to run predefined reports, such as the Dues Batch Report and the Dues Payment Processing Report, or to create reports based on Ad-Hoc queries. For more information regarding Sentinel reports, see the Sentinel Step-by-Step Training Guide.

b. Paid/Unpaid Roster. (Optional except in the three update processings indicated in A.2 above.) This report is a cumulative listing of each member's dues status. It will show the member's name, ID number, amounts due for the current year and the two previous years, if any, the total amount of dues owed, the date



and amount of his last payment and the total amount of dues paid. It can also provide a record of contributions to three charity/solicitation fields.

c. Dues Notices. The initial dues notices will be printed in August for all dues-owing members of Valleys utilizing the service, on forms designed for use by all Valleys. The forms will include all variable information such as the Valley's name and return address, any prior balance due, the amount due for the current year and the total amount due. Each member will mail his dues directly to his own Valley in the return envelope provided with the notice. Follow-up notices will be run in November and March. All follow-up notices will include the message "If dues are current, please disregard." The Supreme Council will contract to have the dues notice forms printed, and then bill the participating Valleys for the notices at cost plus postage at the bulk rate for each notice.

B. Update Schedule. Dues records must be updated on a continuous basis just as the membership records are. Valleys must enter payments in Sentinel in a continuous flow on a regular basis. Prompt dues entry is vital to ensuring that members are presented correct dues balances when paying online. The only deadlines will be the ones for the initial and follow-up dues notice runs and the year-end Paid/Unpaid rosters.

C. Implementation. A Valley wishing to utilize the Valley Membership Services should notify the Supreme Council Computer Services in writing by emailing [tfannin@scottishrite.org](mailto:tfannin@scottishrite.org). Then the Supreme Council Computer Services will guide the Valley through the dues conversion process.

## 29. VALLEY MAILING LABELS

Pressure sensitive (pull off stick on) mailing labels, in either alphabetical order or zip-code sequence, may be ordered from the Supreme Council. Should a Valley need a duplicate set of labels or a duplicate roster, it should request two copies when placing its order.

### \*A. Valley Labels in alphabetical order or zip-code sequence:

Pressure Sensitive - Peel-off, stick-on labels, 30 labels per sheet. These labels have to be attached to mailing material manually.

Original Set = 3¢ per name  
Duplicate Set = 3¢ per name

\*Labels will include the Valley's "X1" (non-members complimentary) unless the order specifies "Members Only; No X1s." The "X1" classification identifies a non-member complimentary that the Valley wants to include in its mailings. X1 records are being phased out and no new X1 nonmembers are being added. Valleys are encouraged to add new or existing nonmember records to the Sentinel system.

### B. "X1" (Non-members Complimentaries) Labels:

Pressure Sensitive = \$11.00 set-up plus 3¢ per name  
Duplicate Set = 3¢ per name

C. Valley Members in Special Zip-code Areas (send zip codes when ordering, arranged in numerical order):

Pressure Sensitive = \$11.00 set-up plus 3¢ per name  
Duplicate Set = 3¢ per name

D. Sojourners only in special zip-code areas (send zip codes in numerical order when ordering): Sojourners are members of other Scottish Rite Valleys who are living in your Valley's zip-code areas.

Pressure Sensitive = \$11.00 set-up plus 3¢ per name  
Duplicate Set = 3¢ per name

E. Occupation Codes - Labels by occupation code are available to any Valley that has submitted these codes for all its members. They may be ordered as follows:

#### 1. All members (alphabetically by occupation code):

Pressure sensitive = 3¢ per name  
Duplicate Set = 3¢ per name

#### 2. Members with the same specified occupation code (specify code when ordering):

Pressure sensitive = \$11.00 set-up plus 3¢ per name  
Duplicate Set = 3¢ per name

F. 14° Initiation Date Labels - See Paragraph 31.

G. Birth Date Labels - See Paragraph 31.

H. Download of Mailing Label Fields - See the Reference section in the back of this manual.

### 30. MEMBERSHIP ROSTERS

- A. Alphabetical One-line Roster (includes identification number, name in alphabetical order, address, member type, level/s obtained, and occupation code, if on file). "X1" non-members (complimentaries) are included unless order specifies "Members Only; No X1s."

Original: \$16.50 set-up plus \$6.90 per 1,000 names printed.  
Duplicate Set: no charge

- B. Numerical ID One-Line Roster (includes ID number, name, address, member type, level/s obtained, and occupation code, if on file) arranged in numerical order by ID number. "X1" non-members (complimentaries) are included unless order specifies "Members Only; No X1s."

Original: \$16.50 set-up plus \$6.90 per 1,000 names printed.  
Duplicate Set: no charge

- C. "X1" Non-members (complimentaries).

Original: \$16.50 set-up plus \$6.90 per 1,000 names printed.  
Duplicate Set: no charge

- D. 14° Initiation Date Roster - See Paragraph 31.

- E. Birth Date Roster - See Paragraph 31.

### 31. 14° INITIATION DATE OR BIRTHDATE ROSTERS/LABELS

Valleys may order from the Supreme Council a roster of and/or mailing labels for members selected on the basis of their 14° initiation dates or birth dates (so long as the Valley supplied these dates to the Supreme Council for all its members on file prior to September 1, 1989). Valleys may order a roster of all their members which lists either their 14° initiation dates or their birth dates. Or they may order a roster of just their potential 25- and 50-year members selected on the basis of the 14° initiation dates. (See Paragraph 37 regarding identifying 50-year members.) Valleys may also order mailing labels for members selected on the basis of their 14° initiation dates, such as all of their potential 25- or 50-year members, or labels for members selected on the basis of their birth dates, such as all of their retirement-age members.

A. RANGE - When ordering rosters or labels selected on the basis of either the 14° dates or birth dates, the Valley may specify a range from one date (month and year) to another for selecting members. The "FROM" and "TO" dates in a range are to be given in six digits (two positions for the month (01, 06, 12, etc.), four positions for the year (1967, 1899). An optional second range may be specified as well, allowing the Valley to get both its potential 25- and 50-year members in just one order. The range may be one year (FROM 01 1960 TO 12 1960), two years (FROM 01 1960 TO 12 1961), or whatever span the Valley chooses.

When ordering roster or labels in order by birth month rather than birth year, only the two-digit month should be indicated; the year is to be left blank. For more information on how to order, see the Reference section in the back of this manual.

B. SORT - The rosters or mailing labels must be ordered in one of the following sorts:

ALPHA	= alphabetical order by name
ID#	= member identification number
14°	= 14° initiation date
B-DA	= date of birth
ZIP	= zip code

C. ROSTERS - A Birth date roster (Exhibit "A") or a 14° Initiation Date roster (Exhibit "B") is available as follows. Prices include shipping and handling charges.

1. All Valley members with 14° dates or birth dates:

Original = \$6.90 per 1,000 names.  
Duplicate = No charge.

2. Members selected by 14° dates or birth dates within one or two ranges or within certain zip-codes (include zips with order):

Original = \$11.00 set-up plus \$6.90 per 1,000 names.  
Duplicate = No charge.

3. A birth date roster of all members in order by birth month rather than birth year:

Original = \$6.90 per 1,000 names.  
Duplicate = No charge.

4. A birth date roster of members selected by birth month within a range of one month or more (in order by birth month):

Original = \$11.00 set-up plus \$6.90 per 1,000 names.  
Duplicate = No charge.

D. LABELS - You would order these if you wanted to make a mailing to all your retirement-age members, or to those members who were initiated 25 or 50 years ago. (Although they may be selected on the basis of the 14° date or the birth date, mailing labels will always be formatted with name and address as shown in Exhibit "C" following, so you may want to order a corresponding roster which will list the 14° dates or birth dates along with the members' names. If you order a corresponding roster with your labels, only one set-up will be charged.)

Pressure-sensitive: \$11.00 set up plus 3¢ per name.  
Duplicate Set: 3¢ per name (no additional set-up).

E. SCHEDULE - The 14° Initiation Date and Birth date rosters and mailing labels are available on the same schedule as the other labels and rosters.

## 32. SCOTTISH RITE JOURNAL

The *Scottish Rite Journal*, the official publication of the Supreme Council, is mailed bimonthly to all members with active membership status in Bodies of the Southern Jurisdiction, U.S.A.

Because Brethren are placed on the mailing list of the *Scottish Rite Journal* using the information given by the Valley on its Statement of Fees and Report of Investitures, the address reported thereon must be not only correct but specific as well, including nine-digit zip code, if available.

The *Scottish Rite Journal* is mailed as Special Standard Mail and, as such, is not entitled to the forwarding privilege accorded First-class mail. If the member's address on the *Journal* is no longer valid, the Post Office provides the new address on the returned magazine and charges the Supreme Council for each address-change notification. Therefore, to control costs, Valleys should report any changes of addresses promptly.

With a membership as large as ours, there are a number of Brethren with the same first name, middle initial, and last name. Therefore, it is necessary that every change of address report include the member's **full** name, his identification number or old address, his new address, including 9-digit zip code if available, and the name or cipher of the Valley. (See Paragraph 6, "Changes of Address and/or of Status.") Changes of

address should be entered in the Sentinel System, emailed to [mbennett@scottishrite.org](mailto:mbennett@scottishrite.org) or mailed to:

COMPUTER SERVICES  
THE SUPREME COUNCIL, 33°  
1733 16th Street, NW  
Washington, DC 20009-3103

A member who is reported demitted, suspended, or deceased is deleted from the *Journal* mailing list and cannot be restored thereon unless the Supreme Council receives official notification (Form 660) that he has been affiliated or reinstated, or that the report of his death was in error.

### 33. TEMPORARY-HOLD-MAIL RECORDS

Members whose *Journal* has been returned by the Post Office as "undeliverable," including those marked "deceased," are coded "Temporary-hold mail." The Secretary should review these reports in Sentinel and make an effort to provide a current address for these members or confirm that the Brother is deceased. These members are excluded from the *Journal* mailings until we receive either a new address, confirmation from the Secretary that the address **is** good, or notification that the member is deceased.

### 34. SCOTTISH RITE WIDOWS

Upon being notified of the death of a Scottish Rite member, the Supreme Council would like to place his widow on our subscriber file to receive the *Scottish Rite Journal* complimentary for one year. Prior to the expiration date of the complimentary subscription, the Supreme Council Computer Services will notify the widow by postcard that she may continue to receive the magazine at no cost if she so chooses. To continue, she should simply check the appropriate box on the postcard and return it to the Supreme Council.

The Supreme Council cannot add widows to our subscriber file automatically because to do so would assume that every deceased member was survived by a widow living at the same address. Therefore, we must rely on the Secretaries to provide the following information about the widow of a deceased member, either singly on the green Form 660 or in groups on 8½"x11" sheets of paper:

- (A) Deceased member's name and ID number;
- (B) Name and mailing address of the widow (use the new address space on the Form 660).

### 35. TWENTY-FIVE YEAR MEMBERSHIP CERTIFICATES

Blank Twenty-five Year Membership Certificates are available in quantity to Valleys at no cost other than the shipping charge. See samples of certificate in the Reference section at the back of this manual. To identify its potential 25-year members, a Valley may order a roster of its members selected on the basis of their 14° initiation dates (see Paragraph 31, 14° Initiation Date and Birth date Rosters/Labels"), unless it is using the Sentinel System and can select its own 25-year members. It is not necessary for the Valley to submit the names of its 25-year members to the Supreme Council for verification of their eligibility. The Valley verifies the twenty-five years of membership and personalizes the certificates in-house for presentation as it sees fit and proper.

### 36. FIFTY-YEAR MEMBERSHIP AWARD

Any 14° member in good standing in the Southern Jurisdiction who was initiated fifty or more calendar years ago is eligible to receive a Fifty-year Membership Certificate and Lapel Pin. (See *Statutes*, Art. XIII, Sec. 21.)

Because our Valleys can now use the Sentinel System to access and update their members' records, they can easily produce a list of their potential 50-year members, based on the 14° initiation dates. [Valleys should refer to the *Sentinel Step-by-Step Training Guide* for instructions.] In addition, they can view an image of the Supreme Council's original record card of each member to verify whether the Brother had any breaks in his membership exceeding one year. With this information the Valley can make its own determination regarding the eligibility of its potential 50-year members. The *Statutes* state that a Brother in good standing "who became a member...fifty or more calendar years prior to the current year is entitled to recognition as such." The Valley has the option of waiving any breaks in service per action of the Supreme Council in 1995. Certainly we want to encourage those members who are active in the Fraternity in every way possible, and recognizing the 50<sup>th</sup> anniversary of their initiation is one way to do that. The verified list may be emailed to the Supreme Council for processing.

Accordingly, the Supreme Council now assumes that all of the members submitted by the Valley for the 50-year award have been verified and deemed eligible by the Valley, and we shall process the 50-Year Certificates and mail them, along with the lapel pins, to the Valley for presentation to the awardees.

A Brother's years of active membership in the jurisdiction of another Supreme Council with which this Supreme Council has relations in amity count towards his fifty-year eligibility, but the Secretary must request from the member's former Bodies written verification of his 14° initiation date and his continuous membership in the other Jurisdiction, or the dates of any break(s) in his membership. Such verification should accompany the Secretary's letter to the Grand Executive Director requesting the Brother's fifty-year award. To allow adequate time for processing and mailing, Valleys should send their requests for fifty-year awards to this office at least 60 days prior to the date of their presentation ceremony.

The Supreme Council supplies a Fifty-year Certificate and Lapel Pin at no cost other than the shipping charge for each member whose record confirms his fifty-year eligibility. If a fifty-year member wants a cap, either the Valley or the recipient must pay for it. Caps are available from the following suppliers:

Fraternal Supplies Inc.  
80 S. Railroad Street  
New London, OH 44851-1268  
Telephone (800) 345-3682  
or (419) 929-1523  
Fax (419) 929-0047  
Website: [www.fraternalssupplies.com](http://www.fraternalssupplies.com)

D. Turin & Co., Inc.  
8045 W. 26th Court  
Hialeah, FL 33016-2797  
Telephone (800) 982-2004  
or (305) 825-2004  
Fax (305) 364-0786  
Website: [www.turinfz.com](http://www.turinfz.com)  
E-mail: [Turinfz@aol.com](mailto:Turinfz@aol.com)

New London Regalia Mfg. &  
US Sword Co.  
One Harmony Place  
New London, OH 44851  
Telephone (800) 634-8253  
or (419) 929-1516  
Fax (419) 929-0122  
Website: [www.newlondonregalia.com](http://www.newlondonregalia.com)

If a member prefers to wear his red or white cap in lieu of a blue 50-year cap, a 50-year cap pin may be purchased from the Supreme Council for \$15.00. The cost for a replacement 50-year lapel pin is \$15.00.

If the Valley is not yet using the Sentinel System, it can order a list of its potential fifty-year members selected on the basis of their 14° initiation dates. See Paragraph 31, "14° Initiation Date or Birth Date Rosters/Labels." After it receives the list, it should check its in-house records to determine the members' eligibility and then send the list of eligible 50-year members to the Supreme Council for processing. If it is unable to verify a member's eligibility, it may request the Supreme Council to do so for it.

### 37. LADIES' CERTIFICATES

Ladies' Certificates may be ordered for wives, widows, mothers, sisters, and/or daughters (natural or legally adopted) of all Brethren in good standing in Scottish Rite Bodies of the Supreme Council, Southern Jurisdiction, U.S.A. An application (Form 990) for such certificate should include the lady's **full** given name (not the name of the male member of her family), her age category (under or over twenty-one), her residence, her relationship to the Brother through whose membership she is entitled to receive a Lady's Certificate, the **full** name of the Brother, his highest Degree or honor attained, and his residence. Applicants must be at least seven years of age. Applications should be sent to the Grand Executive Director's office through the Secretary of the Bodies of which the Brother is a member. The Supreme Council's charge for this certificate is \$5.00 each. (See *Statutes*, Article XI, Section 3.2.) This office will furnish application blanks upon request. (See Paragraph 22, "Blank Forms.")



## 38. RITUALS

It is not permissible to print, publish, or distribute any pictures or illustrations of any part of the Rituals, Rubrics, costumes, scenery, properties, forms, or ceremonies used in the conferring of the Degrees of the Ancient and Accepted Scottish Rite of the Southern Jurisdiction, or to print in a program or other publication issued by the Bodies any extract from, explanation or synopsis of any of the Degrees, or to present any part of the Degrees anywhere at any time except in a tiled meeting or for the purpose of communication or rehearsal, and then only before those who are entitled to be present. (*Statutes*, Article XII, Section 3.5)

## 39. RITUALS REPORT

The Secretary is the custodian of the Rituals loaned to the Bodies (copies on CD as well as any printed copies) and is responsible for their safekeeping at all time. When the Rituals need to be used by a properly authorized member of the Valley, they should be signed out by the recipient and returned as soon as possible so that the Secretary will know at all times where these important documents are. The Secretary must confirm to the Grand Archivist each January that they are in possession of the Ritual CD, and provide an inventory of any printed Rituals in their possession.

## 40. ALBERT PIKE'S MORALS AND DOGMA: ANNOTATED EDITION

It is strongly recommended that every candidate for the Scottish Rite degrees be provided with a copy of Albert Pike's *Morals & Dogma: Annotated Edition*. The book is available only in multiples of 6, and will cost \$25 per copy. Thus, a case of 6 will cost \$150 plus shipping & handling. This price is a discount of \$50 from the retail cost of \$75, and each Valley will save \$300 per case. Please note that this price is to be used only in placing Valley orders for our new Brethren, all orders for current members must go through our retail store. All Valley orders should be placed through Morgan Corr at [mcorr@scottishrite.org](mailto:mcorr@scottishrite.org).

## 41. A BRIDGE TO LIGHT

The Supreme Council supplies copies of *A Bridge to Light* book to each Valley for \$5.00 per book (20 books per box) so that a copy may be presented to each new 14° initiate. Copies of the book may also be sold to other members from the Valley's inventory. Secretaries should contact the Grand Executive Director's office to replenish the Valley's inventory when needed.

#### 42. VALLEY AUDITS AND FORM 990

The Internal Revenue Service has informed us that the Almoner's report should be included on the Valley's Form 990 each year.

Copies of the Valley's Internal Revenue Service Form 990 and Valley audits should be sent to the Grand Executive Director's office each year. This also includes Internal Revenue Service returns and audits for Orient/Valley foundations and any other Scottish Rite related organization.

With the enactment of the Pension Protection Act of 2006, Valley's whose gross receipts are normally less than \$25,000 are now required to electronically file Form 990-N, also known as the e-Postcard, with the IRS annually. Valleys should send a printed copy of Form 990-N or email the IRS confirmation email to the office of the Grand Executive Director after it has been filed.

The Pension Protection Act of 2006 also requires the IRS to revoke the tax-exempt status of any organization that fails to meet its annual filing requirement for three consecutive years. Therefore, if a Valley fails to file Form 990, Form 990-EZ or Form 990-N for three consecutive years its tax exempt status and charter will be revoked as of the filing date of the third year.

#### 43. YEAR-END CHANGES IN STATUS CUT-OFF DATES

It is most important that all initiations and any emailed or mailed changes of status (suspensions, deaths, demissions, reinstatements, affiliations, etc.) that are effective by the end of the year be reported to the Supreme Council by January 15 so that they will be processed as part of the prior year's activity. Emailed or mailed year-end changes received after the cut-off date may not be included in the annual report of the closing year's activity. Rather they will be processed as part of the next year's activity, regardless of the effective date.

Suspensions, deaths, demissions, expulsions, and reinstatements may be processed in the Sentinel System through January 29. Any status change performed after that date may not be included in the annual report of the closing year's activity.

#### 44. DUAL AND PLURAL MEMBERSHIP

A Valley may receive and act upon an applications for Dual or Plural Membership from a Brother who holds membership in an Orient in the Southern Jurisdiction or in the Jurisdiction of another Supreme Council which permits it (see listing in Paragraph 44A). An applicant can verify that he is a member in good standing by showing his current dues (identification) card. A Certificate of Good Standing should not be used for Dual Membership purposes, as it will result in the Brother's demission in his primary Valley.

After electing such a Brother to membership, the Secretary should report the Dual Member to the Supreme Council. If the Brother is a member of another Valley within the

Southern Jurisdiction, his Dual Membership should be reported on the blue Form 440 (see Exhibit 44C). Plural membership (two Valleys within the same Orient) should also be reported on the blue Form 440.

If the Brother is from the Northern Masonic Jurisdiction, his Dual Membership should be reported on the white Application for Dual Membership form (see Exhibit 44D). If the Brother is from the Philippines, his Dual Membership should be reported on the Application for Dual Membership for Members from the Philippines (see Exhibit 44E). One copy of the completed application should be mailed to our Grand Commander and one copy to the Grand Commander of the other Supreme Council involved. No other report is required.

It is absolutely necessary that Dual and Plural Memberships be reported on the proper forms as outlined above. Form 660 ("Change of Address and/or Status") should not be used for reporting either Dual or Plural Members. These members are not regular affiliations and should not be reported as such. Regular affiliation involves demission from the member's former Valley.

We suggest that the Secretary of the secondary Valley notify the Secretary of the Brother's primary Valley that the Brother has been accepted as a Dual or Plural Member as of the date of election.

Dual or Plural Members will list out on the Activity Report under the heading "OUTSIDE AFFILIATION." They will also be identified in Sentinel by one of the following codes:

"D" - identifies a Dual Member who belongs to two Valleys in two different Orients within the Southern Jurisdiction.

"P" - identifies a Plural Member who belongs to two Valleys within the same Orient in the Southern Jurisdiction.

"F" - identifies the primary Valley record of a Dual ("D") or Plural ("P") member.

"N" - Identifies a Dual Member from another Jurisdiction who belongs to two Valleys, one in the Southern Jurisdiction and the other in the Jurisdiction of another Supreme Council.

Upon receiving a report of suspension for other than non-payment of dues, or expulsion of a Dual or Plural Member from either of his Valleys, the Supreme Council will process the change in **both** Valleys to which he belongs.

A report of the demission of a Dual or Plural Member will be processed in the member's record in the Valley submitting the report and at the same time the dual code ("D", "P", or "F") will be removed from the member's other Valley record, as he will no longer be Dual/Plural member.

Upon receiving a notification that a Dual Member from the Jurisdiction of another Supreme Council has demitted from his Valley in the other Jurisdiction, the Supreme

Council will remove the "N" from his Southern Jurisdiction Valley record, as he will no longer be a Dual Member but rather a regular affiliate.

Dual membership, with retention of any Supreme Council honors which may have been invested or conferred by this or any other Supreme Council, is permitted on a reciprocal basis with other jurisdictions with which we are in amity (*Statutes of the Supreme Council, Article XVII, Sec. 33.4*).

When a Brother holds a Dual Membership between the Northern and Southern Jurisdictions, he may choose which Valley he wishes to be his primary Valley for the purpose of allowing him to be eligible for elective office and for further honors. This choice must receive the approval of the Actives or Deputies of the two Orients involved. In each case, the Grand Commanders should be notified of the change.

Unless they are exempted by the Valley, Dual and Plural Members in Valleys on the Billing System will be billed for dues in their secondary Valley as well as in their primary Valley.

Following is a listing of the Orients which currently permit Dual and/or Plural Membership.

#### 44A. ORIENTS PERMITTING DUAL AND/OR PLURAL MEMBERSHIP

<u>ORIENT</u>	<u>DUAL</u>	<u>PLURAL</u>
ALABAMA	Yes	Yes
ALASKA	Yes	No
ARIZONA	Yes	Yes
ARKANSAS	Yes	Yes
CALIFORNIA	Yes	Yes
<u>ORIENT</u>	<u>DUAL</u>	<u>PLURAL</u>
COLORADO	Yes	Yes
DISTRICT OF COLUMBIA	Yes	No
FLORIDA	Yes	Yes
GEORGIA	Yes	Yes
HAWAII AND GUAM	Yes	No
IDAHO	Yes	Yes
IOWA	Yes	Yes
JAPAN, KOREA AND OKINAWA	Yes	Yes
KANSAS	Yes	Yes
KENTUCKY	Yes	Yes
LOUISIANA	Yes	Yes
MARYLAND	Yes	Yes
MINNESOTA	Yes	Yes
MISSISSIPPI	Yes	Yes
MISSOURI	Yes	Yes
MONTANA	Yes	Yes
NATO BASES	No	No
NEBRASKA	Yes	Yes
NEVADA	Yes	No

NEW MEXICO	Yes	Yes
NORTH CAROLINA	Yes	No
NORTH DAKOTA	Yes	Yes
OKLAHOMA	Yes	Yes
OREGON	Yes	Yes
PANAMA CANAL	Yes	No
PUERTO RICO	Yes	No
SOUTH CAROLINA	Yes	No
SOUTH DAKOTA	Yes	Yes
TAIWAN AND CHINA	Yes	Yes
TENNESSEE	Yes	No
TEXAS	Yes	Yes
UTAH	Yes	No
VIRGINIA	Yes	Yes
WASHINGTON	Yes	Yes
WEST VIRGINIA	Yes	Yes
WYOMING	Yes	Yes

44B. OTHER SUPREME COUNCIL JURISDICTIONS PERMITTING  
 RECIPROCAL DUAL MEMBERSHIP

NORTHERN MASONIC JURISDICTION (NMJ)  
 PHILIPPINES

Exhibit 44C.

FORM TO REPORT DUAL/PLURAL MEMBERS  
FROM WITHIN THE SOUTHERN JURISDICTION

**FORM 440**  
REPORT OF DUAL OR PLURAL MEMBERSHIP STATUS  
TO THE SUPREME COUNCIL

Date of Election \_\_\_\_\_

Valley \_\_\_\_\_

Orient \_\_\_\_\_

MEMBER HISTORY

ORIGINAL VALLEY MEMBERSHIP

Name (in full) \_\_\_\_\_

ID Number \_\_\_\_\_

Address \_\_\_\_\_

Valley \_\_\_\_\_

Address \_\_\_\_\_

Orient \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Date of Birth \_\_\_\_\_

Place of Birth \_\_\_\_\_

Occupation \_\_\_\_\_ (If retired, give occupation retired from)

Blue Lodge Name & Number \_\_\_\_\_

**USE THIS FORM TO REPORT DUAL OR PLURAL MEMBERSHIP INVOLVING ORIENTS WITHIN THE  
SOUTHERN JURISDICTION THAT ARE PERMITTED TO HAVE DUAL OR PLURAL MEMBERSHIP.**

44D. Form To Be Used Only for Dual Member Applicants from the Northern Masonic Jurisdiction  
**ANCIENT & ACCEPTED SCOTTISH RITE OF FREEMASONRY**  
**APPLICATION for DUAL JURISDICTION MEMBERSHIP**

**for**

(Print Name in Full)	(Degree)	(Primary Valley Member ID # on Dues Card)

I am a member in good standing of the A&A Scottish Rite, Valley of \_\_\_\_\_,  
 Orient of \_\_\_\_\_, in the \_\_\_\_\_ Jurisdiction.

This is my request for DUAL (secondary) MEMBERSHIP status in the Valley of \_\_\_\_\_,  
 Orient of \_\_\_\_\_, in the \_\_\_\_\_ Jurisdiction.

I understand that in making this application for Dual Membership, the following rules will apply:

- a) That the rules and regulations of my primary membership jurisdiction shall continue to apply;
- b) That I am not eligible for Honors except in my primary Valley;
- c) That in my secondary Valley I may serve on committees or hold an appointed office;
- d) That in applying for Dual Membership, I must maintain good standing in both my Masonic Lodge and primary Scottish Rite Bodies.

\_\_\_\_\_  
 Signature of Applicant for Dual Membership

**PLEASE ANSWER IN FULL**

Mailing _____	Date of Birth: _____
Address _____	Place of Birth: _____
_____	Present Blue Lodge: _____ No. ____
	Location: _____
Residence _____	Work Phone: _____
Address: _____	Home Phone: _____
Date of Primary Valley Scottish Rite Degrees: _____ Lodge: _____ Chapter: _____	
Council: _____ Consistory: _____ Occupation _____	

**VALLEY CERTIFICATION**

**I CERTIFY** that I have verified the paid-up dues status of this member's primary Valley membership. On \_\_\_\_\_ this member was voted/accepted as a dual member of this Valley. I have notified the primary Valley Secretary of this action and have forwarded a copy of this application to him and to the Sovereign Grand Commanders of each jurisdiction.

_____ (Signature of Secondary Valley Secretary)	_____ Date	_____ Date of Dual Affiliation
Primary Valley Name: _____	Secondary Valley Name: _____	
Street: _____	Street: _____	
City/State/Zip: _____	City/State/Zip: _____	

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_



44E. USE THIS FORM TO REPORT DUAL MEMBERS FROM THE PHILIPPINES ONLY

**ANCIENT & ACCEPTED SCOTTISH RITE OF FREEMASONRY  
APPLICATION for DUAL MEMBERSHIP with The Philippines**

Date \_\_\_\_\_

To the officers of the A.& A. Scottish Rite Valley of \_\_\_\_\_  
I, \_\_\_\_\_, am a member in good standing of the A.& A. Scottish Rite  
(Print or Type Full Name Above)

Valley of \_\_\_\_\_, Orient of \_\_\_\_\_ Degree \_\_\_\_\_

Date of Election \_\_\_\_\_ My dues card expires on \_\_\_\_\_

PLEASE GIVE FULL AND COMPLETE INFORMATION

Street

Address \_\_\_\_\_

Date of Birth \_\_\_\_\_

\_\_\_\_\_

Place of Birth \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

Name, No. and Location of Present Blue

Lodge

Permanent Residence Address:

\_\_\_\_\_ No. \_\_\_\_\_

\_\_\_\_\_

Location \_\_\_\_\_

\_\_\_\_\_

Year You Joined the Scottish Rite \_\_\_\_\_

\_\_\_\_\_

Occupation \_\_\_\_\_

I understand that in making this application for Dual Membership, the following rules will apply:

- a) That dues are the same as regular membership in the Bodies to which application is made;
- b) That I am not eligible for Honors except in my primary Bodies;
- c) That I may serve on committees or hold an appointed office;
- d) That my two sponsors must be members of the Bodies to which I am applying;
- e) That in applying for Dual Membership, I must provide continuing proof of good standing in my Craft Lodge and in my primary Scottish Rite Bodies.
- f) That the rules and regulations of the Supreme Council for the Philippines shall continue to apply.

\_\_\_\_\_  
Signature (Write Plainly)

I CERTIFY that, as a sponsor, I am personally acquainted with the applicant, and from a confidence in his integrity and Masonic Worth, do cheerfully recommend that his petition for Dual Membership be granted.

(Signatures of Two Sponsors)

\_\_\_\_\_  
Date of Election as Dual Member in the A.&A.S.R., Southern Jurisdiction \_\_\_\_\_

Mail copy of completed form to the Sovereign Grand Commander of each Supreme Council at the address following:

The Supreme Council, P.O. Box 555, Manila, The Philippines  
The Supreme Council, 1733 - 16th Street NW, Washington, DC 20009-3103

#### 45. DIRECTORY OF SGIGS, DEPUTIES, PERSONAL REPRESENTATIVES, AND SECRETARIES

The SGIG or Deputy should promptly report to the Grand Executive Director any changes of Valley Secretary and/or Personal Representative that he makes, giving all the new information that should be included in the Valley's listing in the *Directory* and in the Valley Listing on the Supreme Council's web site ([www.scottishrite.org](http://www.scottishrite.org)) directory (post office box and/or street address, city, state, and nine-digit zip code, telephone/FAX number/s, email addresses, etc.) To protect the privacy of our Scottish Rite leaders, we do not include home street addresses or home telephone numbers in the Valley Listing on our web site, which is available to the public. The Valley Secretary should also notify the Grand Executive Director's office of any changes that should be made to the Valley's listing.

Meeting schedules and Reunion dates are compiled from information supplied to the Grand Executive Director's office at the beginning each year on the annual Meetings and Reunions Schedule form. A copy of the final emailed report, should be kept and inserted at the end of the printed *Directory*.

#### 46. REPORTING CHANGE OF SECRETARY and PERSONAL REPRESENTATIVE

The Sovereign Grand Inspector General or Deputy should notify the Supreme Council immediately of his appointment of a new Secretary and/or Personal Representative or the resignation of a Secretary/Personal Representative. Either he or his Personal Representative, or the Venerable Master of the Lodge of Perfection, or another officer of the Bodies should notify the Supreme Council of the death of a Valley Secretary.

#### 47. REPORTING DEATH OF A THIRTY-THIRD DEGREE MEMBER

When a 33° Inspector General Honorary passes away, the Secretary should notify the Sovereign Grand Inspector General or Deputy in his Orient, who should, in turn, notify the Grand Executive Director. Notification should include date of death.

#### 48. BULLETINS, MAGAZINES AND PROGRAMS

The Supreme Council is always glad to receive copies of the bulletins, programs and other literature issued by its Bodies. Two copies should be the minimum, one addressed to the *Scottish Rite Journal*, and one to the Grand Executive Director.

Notices of particular interest appear regularly in the *Journal*. We encourage you to read it, and if you have items of interest, write them up and submit them to the Managing Editor for consideration.

If Reunions are written up in a short and concise manner covering special features, an effort will be made to publish them in the *Journal* as items of interest to members.

#### 49. ADDRESS MATCHING

The addresses on the *Scottish Rite Journal* and the annual dues renewal statements are certified using the USPS One-code Address Change Service (ACS) barcode. As a result, the addresses on these mailings are matched against the official U.S. Post Office national address file. Addresses that are changed as a result of this matching are reported to the Supreme Council electronically and appear on the Name/Address Change Report under the heading, "MEMBERS WHOSE ADDRESS HAS BEEN CHANGED BY ACS & POST OFFICE PROCESSING." In Sentinel, these changes are identified on a member's Profile screen as Change Type, "USPS Addr Change Service."

#### 50. INVESTMENT POLICIES AND GUIDELINES

Monies and investments owned by Orients, Valleys and related entities, such as foundations, temple corporations, holding companies, etc. should be safeguarded and managed in a prudent manner. As part of the Strategic Plan of the Supreme Council, information is provided to Orients and Valleys in order to provide a framework for financial success. The purpose of this document is to outline general strategies for prudent financial management. It is neither the desire nor the intent of the Supreme Council to provide "investment advice" to the Orients and Valleys, but rather to provide a framework of ideas and concepts that can be utilized.

#### 51. SCOTTISH RITE CREDIT CARD PROGRAM

The Scottish Rite VISA credit card program not only provides a service to our members but also generates substantial ongoing revenues for the support of our RiteCare Childhood Language Clinics, Centers, and Programs. Funds received from the credit card program, without a cent of administrative overhead, are channeled to those Orient Foundations that participate in our Rite Care Childhood Language Program. For more information, call 1-888-327-2265, ext 70097. Be certain to state that you are with the Scottish Rite, Southern Jurisdiction.

#### 52. ART PRINTS

To help raise funds for the Scottish Rite Foundation, S.J., U.S.A., Inc., art prints of the following original oil paintings have been made available. A painting by John Melius was commissioned by the Supreme Council to commemorate the 1995 Session and the 50th anniversary of the end of World War II. "Tools of the Craft," painted by Brother Robert H. White, 32°, was commissioned to commemorate the 1997 Biennial Session. To commemorate the 1999 Session, John Melius was commissioned to paint "George

Washington's Inauguration," a companion print to his 1993 painting (no longer available). When framed and mounted, these large, colorful prints make a striking addition to the decor of any home, office, Lodge, Scottish Rite Temple, or other Masonic institution. All proceeds from the distribution of these art prints benefit our RiteCare Childhood Language Clinics, Centers, and Programs throughout the Southern Jurisdiction. For pricing information, refer to the "Scottish Rite Store" on the Supreme Council's web site ([www.scottishritestore.org](http://www.scottishritestore.org)).

#### 53. SCOTTISH RITE SPONSORED GROUP CANCER EXPENSE PLAN

This plan is available to you and your spouse regardless of age. It is designed as a supplemental plan to pay benefits directly to you, not the doctor or a hospital. With cancer there can be many expenses not covered by regular health insurance or Medicare. The extra benefits can be used for anything... for meals, travel expenses, and hotel bills away from home while attending a cancer clinic, for living expenses while being away from the job and other "non-medical" type expenses having a cancer can generate. You spend your extra benefits as you see fit. For information call 1-800-336-3316. Be certain to state that you are with the Scottish Rite, Southern Jurisdiction.

#### 54. SCOTTISH RITE SPONSORED MEDICARE SUPPLEMENT INSURANCE PLAN

If you are age 65 or over and covered by Parts A and B of Medicare, you are eligible to apply for the Scottish Rite Medicare Supplement Insurance Plan. Medicare does not pay all doctor's and hospital bills. This coverage dovetails with your Medicare coverage and complies with the new Federal requirements for Medigap policies. For information call 1-800-247-1771. Be certain to state that you are with the Scottish Rite, Southern Jurisdiction.

#### 55. SCOTTISH RITE SPONSORED LONG TERM CARE INSURANCE PLAN

Confinement in a nursing home could deplete a person's lifetime savings. Best of all, the Scottish Rite sponsored plan also pays for at home long term care when appropriate. You choose the daily benefit that best fits your needs based upon the local cost of this care. It is best to find out if you qualify for a long term care policy medically while you are younger and can meet the health history requirements for this type of coverage. For information, call 1-800-336-3316. Be certain to state that you are with the Scottish Rite, Southern Jurisdiction.

#### 56. SCOTTISH RITE SPONSORED GROUP TERM LIFE INSURANCE PLAN

Term life insurance is pure life insurance that gives the greatest amount of coverage for the premium dollar. Scottish Rite members are guaranteed up to \$25,000 coverage without a medical exam or single health question. And the coverage is portable. It doesn't lapse when you leave the job and lose your regular company group life insurance coverage. Members age 45 through 75 are eligible for this coverage. Unlike

most other term insurance plans, you can keep your coverage for your lifetime. Benefits are frequently used to help pay for final expenses. For information call 1-800-749-6983. Be certain to state that you are with the Scottish Rite, Southern Jurisdiction.

#### 57. SCOTTISH RITE SPONSORED LIFE LINE SCREENING OF AMERICA

When mobile screening units come to your neighborhood, you can be screened for potential health problems as a preventative measure. Screenings are for Stroke/Carotid Artery, Peripheral Arterial Disease, Abdominal Artery Aneurysm, Atrial Fibrillation and Osteoporosis for only \$149.00 for Scottish Rite members. For information call toll free 1-800-643-5507. Be certain to state that you are with the Scottish Rite, Southern Jurisdiction.

#### 58. SCOTTISH RITE SPONSORED AUTO INSURANCE PLAN

You call the Scottish Rite sponsored Auto Insurance Plan toll free number to see if you can save on your auto insurance premiums. Homeowners Insurance is also available. The toll free number is 1-800-888-2308. Be certain to state that you are with the Scottish Rite, Southern Jurisdiction.

#### 59. SCOTTISH RITE SCHOLARSHIPS AT GEORGE WASHINGTON UNIVERSITY

The Southern Jurisdiction is engaged in an active scholarship agreement with The George Washington University (GWU). Twenty Scottish Rite of Freemasonry Scholarships for 50% of tuition (\$20,805 each or \$83,220 over four years) are available for full-time undergraduates entering the university. The scholarships apply to any school or department at GWU. To qualify, either the applicant or applicant's father, brother, grandfather, or uncle must be or have been a member of the Scottish Rite of Freemasonry. Also, the applicant must be a U. S. citizen and have achieved academic excellence in high school grades and on national standardized tests. GWU handles the selection of awardees. Thus when a student applies for admission he should include a letter expressing interest in this scholarship. Another means is to list it on the GWU financial aid form. The contact person for this program is the Assistant Director, Office of Admissions, Telephone Number (202) 994-6040. Information may be found on our website ([www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scholarship Programs)).

For graduate study, ten fellowships of up to \$15,000 each are available for full-time students accepted in the GWU School of Business and Public Management, the Elliott School of International Affairs, the School of Engineering and Applied Science, the Graduate School of Education and Human Development, or the Columbian School of Arts and Sciences. Students in the School of Medicine and Health Sciences are eligible to apply only if they are in the Public Health programs. To qualify, students must be U.S. citizens and should have an affiliation with the Scottish Rite through their father, brother, grandfather, or uncle, and demonstrate academic excellence by undergraduate (and graduate, if applicable) transcripts and G.R.E. and G.M.A.T. scores. GWU handles the

selection of awardees, and preference is given to students interested in public or foreign service. The person to contact for this program is Ms. Geri Rypkema, Coordinator, Graduate and Faculty Fellowships, Telephone Number (202) 994-6829. Information may be found on our website ([www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scholarship Programs)).

The Scottish Rite/Bichan Scholarship at The George Washington University was established in November 1995, through the bequest of George and Florence Bichan. The grants, in the amount of up to \$10,000 each, are awarded annually normally to two full-time undergraduate or graduate students enrolled in Children's Speech and Hearing degree programs. While we sponsor the scholarships, we do not directly handle them. Prospective recipients are reviewed in advance by the Scottish Rite and are selected by the Office of Graduate Student Support and the University Financial Aid Office in conjunction with the Graduate School of Education and Human Development and the Columbian School of Arts and Sciences. The person to contact for this program is Ms. Geri Rypkema, Coordinator, Graduate and Faculty Fellowships, Telephone Number (202) 994-6829. Information may be found on our website ([www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scholarship Programs)).

## 60. PUBLIC SCHOOL ADMINISTRATION

The purpose of the Public School Administration Scholarship is to assist individuals, who have completed master's degrees in some phase of education, to attain a doctoral degree in Public School Administration. This scholarship is intended for mid-career persons in public school administration who are burdened with financial obligations of growing families and thus would be unlikely to pursue further graduate studies without financial assistance. Two scholarships are offered, each in the amount of \$6,000 per year, for two years of study in a university of the individual's choice. That university, of course, must be an accredited institution. Information and application forms may be found on our website ([www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scholarship Programs)).

## 61. SHEPHERD SCHOLARSHIP

The Shepherd Scholarship, also offered by the Supreme Council, is awarded to aid worthy candidates in obtaining baccalaureate or graduate degrees in fields associated with service to country and generally perceived as benefiting the human race. The scholarships in the amount of \$1,500 per year, for a maximum of four years, are offered by the Supreme Council each year. Applications must be received each year by the Director of Education on or before April 1. Information and application forms may be found on our website ([www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scholarship Programs)).

## 62. SAM AND MILLIE HILBURN SCHOLARSHIP

The inception of a new scholarship by Sam and Millie Hilburn started with the 2000-2001 academic year. This fund will provide scholarships for graduate students studying to become specialists in the field of Childhood Language Disorders. The scholarships in the amount of \$5,000 per year towards tuition costs for a maximum of two years are offered by the Supreme Council each year. Information and application forms may be found on our website ([www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scholarship Programs)). Interested students may return it along with the required documentation to this office each year between January 1 and April 1.

## 63. SOVEREIGN GRAND COMMANDER'S SCHOLARSHIP

The Sovereign Grand Commander's Scholarship Program, established in January 2006, was created to help individuals who want to go to college or to learn a trade but need financial assistance. Unlike other scholarships, however, this program is not designed to help people with the highest grade point average or test scores. Instead, the scholarships are for individuals who have the potential to accomplish great things due to attributes like demonstrated leadership ability, volunteer experience, participation in social, civic, religious and fraternal activities, or hardships or disabilities they are overcoming. Funds to secure the first scholarship were received from Ill. Earl Walker, 33°, G.M.C., and his wife Myrtle in August 2007. On September 21, 2007, Sovereign Grand Commander Seale selected Mr. Daniel Pazo of Lodi, California, the first recipient of this scholarship. Information and application forms may be found on our website ([www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scholarship Programs)).

## 64. SCOTTISH RITE YOUTH PROGRAM FOR JROTC ENROLLEES

The Scottish Rite, Southern Jurisdiction, Youth Program recognizes high-school youth enrolled in the Junior Reserve Officers Training Corps (JROTC), with an award for their scholastic excellence and demonstrated ideals of Americanism. Information and Guidelines may be found on our website: [www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scottish Rite ROTC & JROTC Programs). The award consists of a medal and ribbon to be worn on the JROTC uniform, and a certificate suitable for framing (see the Reference Section in the back of this manual). The medal depicts the heraldic logo of the Scottish Rite of Freemasonry, and by the words "JROTC Education and Americanism" calls attention to the two major focal points of the Scottish Rite. The medal, ribbon, and certificate are available from the Grand Executive Director's office as a package, originally for \$5.00 each, plus shipping cost. Due to a substantial increase in the cost of materials, in July 2012 the price of the medal will rise to \$6.00 each, plus shipping cost. Unless notified otherwise, the packages are shipped UPS Ground. You are encouraged to adopt this opportunity for recognition of special youth in the JROTC high schools located in your Valley.



## 65. SCOTTISH RITE YOUTH PROGRAM FOR ROTC ENROLLEES

This Scottish Rite, Southern Jurisdiction, Youth Program recognizes college students enrolled in the Reserve Officers Training Corps (ROTC), with an award for their scholastic excellence and demonstrated ideals of Americanism. Information and Guidelines may be found on our website: [www.scottishrite.org](http://www.scottishrite.org) (click on "About the S.R."; Philanthropy & Scholarships; Scottish Rite ROTC & JROTC Programs). The award consists of a medal and ribbon to be worn on the ROTC uniform, and a certificate suitable for framing (see the Reference Section in the back of this manual). The medal depicts the heraldic logo of the Scottish Rite of Freemasonry, and by the words "ROTC Education and Americanism" calls attention to the two major focal points of the Scottish Rite. The medal, ribbon, and certificate are available from the Grand Executive Director's office as a package, originally for \$5.00 each, plus shipping cost. Due to a substantial increase in the cost of materials, in July 2012 the price of the medal will rise to \$6.00 each, plus shipping cost. Unless notified otherwise, the packages are shipped UPS Ground. You are encouraged to adopt this opportunity for recognition of special youth in the ROTC schools located in your Valley.

The Supreme Council, 33°, created two national foundations to undertake the charitable work of the fraternity. They are the Scottish Rite Foundation, Southern Jurisdiction, USA, Inc. and the House of the Temple Historic Preservation Foundation, Inc.

## 66. SCOTTISH RITE FOUNDATION, SOUTHERN JURISDICTION, U.S.A., INC.

The Supreme Council created the Scottish Rite Foundation (SRF), Southern Jurisdiction, U.S.A., Inc. to support the RiteCare® Childhood Language Program, to provide scholarships to individuals to attend colleges or vocational schools and to provide national disaster relief. The SRF donates \$20,000 for the start up of any new RiteCare® Childhood Language Program facilities in the Southern Jurisdiction. It also funds scholarships for individuals and provides disaster relief across the Jurisdiction. The Scottish Rite Foundation, Southern Jurisdiction, U.S.A., Inc. ("SRF") is a non-profit organization that is exempt from taxation under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended. The Foundation's tax identification number is 52-6054737. Contributions to the SRF are tax-deductible to the extent provided by law. The SRF manages the Pooled Income Fund (PIF) and Charitable Gift Annuities (CGA) programs, which can benefit local Scottish Rite Foundations. See the separate Sections in this Manual regarding the PIF and CGA Programs.

## 67. HOUSE OF THE TEMPLE HISTORIC PRESERVATION FOUNDATION, INC.

In 1990, The Supreme Council, 33°, created the House of the Temple Historic Preservation Foundation, Inc. to maintain, enhance and preserve the House of the Temple as the national headquarters of the Scottish Rite of Freemasonry, Southern Jurisdiction, U.S.A., Inc. and as a library and museum open to the public. Each year, several thousand people visit the House of the Temple to see the magnificent

architecture, to see the various exhibits that describe the history and achievements of Freemasons, and to undertake scholarly research about Masons and Freemasonry.

The House of the Temple Historic Preservation Foundation, Inc. is a non-profit organization that is exempt from taxes under Section 501(c)(3) of the Internal Revenue Code. So, contributions to the House of the Temple Historic Preservation Foundation, Inc. are tax-deductible to the extent permitted by law. The House of the Temple Historic Preservation Foundation, Inc. tax identification number is 52-1664576.

## 68. THE DEVELOPMENT OFFICE

The Supreme Council's Development Office works to raise funds for the Scottish Rite Foundation, Southern Jurisdiction, USA, Inc., the House of the Temple Historic Preservation Foundation, Inc., and to help local Orients and Valleys who are trying to raise funds for their local Scottish Rite Foundations. The Development Office can help you to solicit local gifts, advise you in setting up a foundation or fundraising program, and provide analyses of charitable gifts. The members of the Development Team are: Matt Szramoski, 33°, Robert Heffelfinger, 32°, and Allison Godfrey. If you need help with a prospective donor or if you are interested in information about the Scottish Rite's several philanthropies, please contact the members of the Development Office. Their contact information is:

Matthew T. Szramoski, 33°  
Director of Development  
1733 16<sup>th</sup> Street, NW  
Washington, DC 20009  
202-777-3143  
mszramoski@scottishrite.org

Robert Heffelfinger, 32°  
Gifts and Communications Coordinator  
1733 16<sup>th</sup> Street, NW  
Washington, DC 20009  
202-777-3111  
rheffelfinger@scottishrite.org

Allison Godfrey  
Major Donor Coordinator  
1733 16<sup>th</sup> Street, NW  
Washington, DC 20009  
202-777-3196  
agodfrey@scottishrite.org

## 69. CHARITABLE GIFT ANNUITY PROGRAM

If you are trying to raise funds for your local Scottish Rite foundation, you can get help from the Development Office of the Supreme Council. If, for instance, you know a member who wants to donate to your Orient or Valley's Scottish Rite foundation or RiteCare® program, one way for the member to make his gift is through the Scottish Rite Foundation, Southern Jurisdiction's Charitable Gift Annuity ("CGA") program. The donor enters into a contract with the Scottish Rite Foundation, S.J., U.S.A., Inc. (SRF, SJ) which provides for the SRF, SJ to pay the donor and/or one other person an annuity for their lives, and upon the survivor's death, to pay the balance, called the remainder, to the donor's designated Scottish Rite foundation. The SRF, SJ handles the paperwork involved with making this gift including licensing with the various states, saving your Orient the administrative costs of running its own program.

With our Gift Annuity Program, a donor also can divide his or her remainder among the local and national Scottish Rite Foundations, including the House of the Temple Historic Preservation Foundation, Inc., in any percentage he or she elects. The minimum contribution to the Scottish Rite Foundation Gift Annuity Program is \$5,000. At your request, the Development Office will provide an analysis for the local member of a hypothetical contribution to the CGA Program so that the donor can evaluate the benefits of a CGA and make an educated decision about whether this gift vehicle is appropriate. There is no charge for the analysis, and it does not commit the donor to making a gift. But it is very useful for the member to see their tax deduction and income stream. If you want, we can mail the hypothetical to you to present personally to the prospective donor or we can mail it to the prospective donor.

For more information, contact the Development Office at [developmentoffice@scottishrite.org](mailto:developmentoffice@scottishrite.org), or call the Director of Development at 202-777-3143 or the Gifts and Communications Coordinator at 202-777-3111.

## 70. POOLED INCOME FUND

Similarly, a member can benefit his local foundation by making a contribution to the Scottish Rite Foundation, Southern Jurisdiction, USA, Inc.'s Pooled Income Fund ("PIF") and naming the local foundation as the remainder beneficiary. A PIF is a trust in which a number of donors "pool" their gifts and receive their proportionate share of the earnings derived from the investment of all of the assets in the pool. A donor irrevocably transfers funds or appreciated securities to the PIF (the PIF cannot accept real estate or tax-exempt property under IRS rules). The donor's contribution is combined with the assets given by all other donors to the fund and invested. The donor and any designated income beneficiary receive income payments from the PIF for their lives, based upon their allocated share of the dividends and interest earned by the whole PIF, exclusive of capital gains. When the last income beneficiary dies, the charity receives any principal left in the donor's PIF account as an irrevocable gift. The donor gets a charitable tax deduction in the year he or she makes the gift. The minimum contribution to the Scottish Rite Foundation PIF is \$5,000. The Development Office will be happy to run an analysis for the local member of a hypothetical contribution to the PIF so that the donor can evaluate the benefits and make an educated decision about whether this type of gift is

appropriate. There is no charge for the analysis, and it does not commit the donor to making a gift.

For more information, contact the Development Office at [developmentoffice@scottishrite.org](mailto:developmentoffice@scottishrite.org), or call the Director of Development at 202-777-3143 or the Gifts and Communications Coordinator at 202-777-3111.

## 71. PLEDGES

The Scottish Rite Foundation, S.J., U.S.A., Inc. and the House of the Temple Historic Preservation Foundation, Inc., also have formal pledge programs. Through the Pledge Programs, an individual may make a pledge to a local or Supreme Council foundation to pay a certain sum per year for a period of up to five years or may make a pledge that will be satisfied through a specific bequest in the donor's will or living trust. If a member makes a pledge of \$10,000 or more, the Supreme Council, at the secretary's written request and with the written approval of the SGIG or Deputy, will recognize that donor under the Scottish Rite Donor Recognition Program for the full amount of that pledge at the time it is made rather than when it is fully paid.

For more information, contact the Development Office at [developmentoffice@scottishrite.org](mailto:developmentoffice@scottishrite.org), or call the Director of Development at 202-777-3143 or the Gifts and Communications Coordinator at 202-777-3111.

## 72. DONOR RECOGNITION PROGRAM

Under the Donor Recognition Program, any donor who contributes \$10,000 or more to a local or Supreme Council foundation can be recognized at the national headquarters. So, if the donor contributes \$10,000, the Development Office will recognize them as a Patron. The donor will have his or her name engraved on a bronze nameplate which will be mounted on the Patron's Panel at the House of the Temple, and the donor's name will be listed in the Gold Book of Recognition. (Local donors do not receive tokens of appreciation such as the etched vase; such gifts are restricted to gifts to the national foundations). To take advantage of this recognition, a secretary must provide the Development Office with a written request for the recognition, listing the donor's name, address, phone number, amount of donation, and how the donor wants his or her name listed, and the SGIG or Deputy would have to sign the request. The donor's name cannot include titles or degrees, but can include middle names or initials and suffixes. For example, John R. Smith or John and Marie Smith would be acceptable.

For more information, contact the Development Office at [developmentoffice@scottishrite.org](mailto:developmentoffice@scottishrite.org), or call the Director of Development at 202-777-3143 or the Gifts and Communications Coordinator at 202-777-3111.

## 73. CALENDAR PROGRAM

Each year, as its main annual fundraiser, the House of the Temple Historic Preservation Foundation, Inc. mails out to most Scottish Rite members a magnificent 15 month wall calendar, with images of the House of the Temple. There is an announcement mailing, the calendar mailing, and a follow up mailing. The donations that members send in as a result of the calendar mailings help to pay for the maintenance and preservation of the House of the Temple, an architectural landmark and the national headquarters of the Southern Jurisdiction. The brethren have been enthusiastic and generous in their response to the mailing.

## 74. REBUILDING THE TEMPLE CAMPAIGN

As the Scottish Rite of Freemasonry quickly approaches the centennial anniversary of the magnificent headquarters of the Southern Jurisdiction of Freemasonry, The House of the Temple, we are pleased to announce the launch of the Rebuilding the Temple Campaign.

Since opening to the public in 1915, millions of brethren and visitors have come to the Temple, located in the heart of Washington, D.C., to view the ceremonial rooms, treasured symbols, ancient books, and prized artifacts.

While still a site to behold, The House of the Temple has had few structural improvements since its completion, and it is our duty to prioritize the preservation and promotion of our headquarters and our efforts to make it a national Masonic center in Washington, D.C for both our Masonic brethren as well as the general public.

- Essential Projects:
- Structural Rehabilitation
- Accessibility & Safety
- Preservation & Education
- Restoration
- Endowment for Future Maintenance

Once completed, this campaign will improve The House of the Temple's overall structure and appearance, make it safer and more accessible to the public, preserve its artifacts, create a Museum, and develop educational programs and web-based initiatives. It will be in this building where our future members develop their commitment to Freemasonry and our fraternity finds its face for the 21st century.

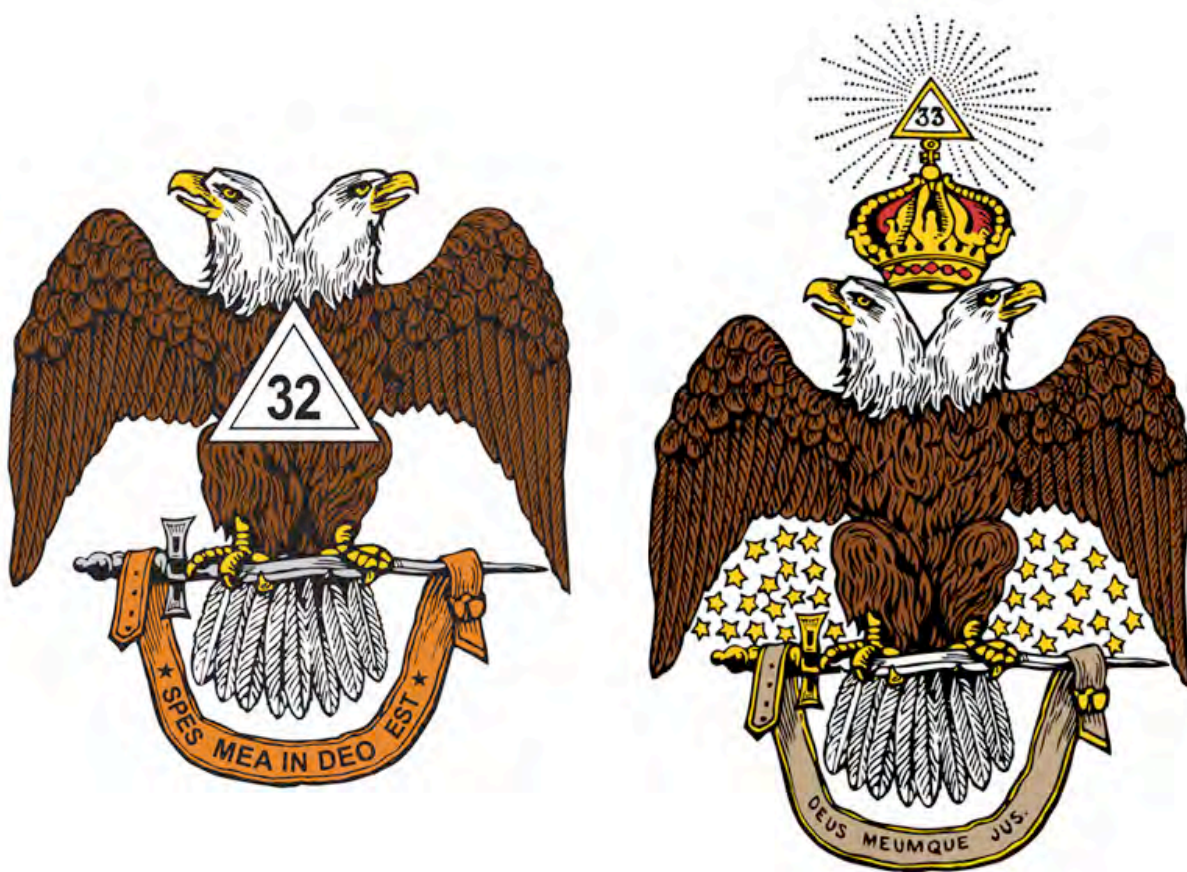
It is a time for action. Necessary and long overdue alterations must be made to the Temple in order to ensure the preservation of our Masonic history and the promotion of Freemasonry to future generations.

The Rebuilding the Temple Campaign is an effort that is part of the House of the Temple Historic Preservation Foundation, Inc., which is a non-profit Virginia corporation recognized as a tax-exempt public charity under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended. Its tax identification number is 52-1664576.

Contributions to the House of the Temple Historic Preservation Foundation, Inc. and the Rebuilding the Temple Campaign are tax-deductible to the extent allowed by the law.

## 75. DOUBLE EAGLE COLLECTIVE MARKS

The Supreme Council, 33°, has filed formally for registration of the following double eagle symbols as collective marks of the fraternity:



A collective mark is a mark that shows a person's affiliation with an organization or group (unlike a traditional trademark that shows the manufacturer or provider of a good or service). Members should use these versions of the double eagle marks on clothes, decals, membership cards, business cards, etc. If you have any questions, please contact Barbara Golden, General Counsel at 202-777-3163 or [bgolden@scottishrite.org](mailto:bgolden@scottishrite.org).

76. IDENTIFICATION OF BODIES AND ORIENTS BY CIPHER  
(IN ALPHABETICAL ORDER)

For the purpose of identification, all Valleys have been assigned a unique cipher. Either this cipher or the name of Valley and Orient should, without fail, be given on all Form 660 reports "Change of Address and/or Status." Following is a list, in alphabetical order, of the Orient and Valley ciphers.

Note: In most instances these ciphers have been formed by using the first three or four letters, in reverse order, of the name of the Orient (state) or the Valley (city) in which the Bodies are located.

<u>Cipher</u>	<u>Name of Valley</u>	<u>Name of Consistory</u>
ABLA	Albany, GA	ALBANY
ABNAS	Santa Barbara, CA	SANTA BARBARA
A CM	McAlester, OK	McALESTER
ACO	Ocala, FL	OCALA
AED	Deadwood, SD	BLACK HILLS
AES	Seattle, WA	SEATTLE
AFERG	Great Falls, MT	GREAT FALLS
AHC	Chattanooga, TN	CHATTANOOGA
AIM	Miami, FL	MIAMI
ALC	Clarksburg, WV	CLARKSBURG
ALK	Klamath Falls, OR	KLAMATH
AMO	Omaha, NE	OMAHA
ANAS	San Antonio, TX	SAN ANTONIO
AOR	Roanoke, VA	ROANOKE
APS	Spartanburg, SC	
ARF G	American Military, NATO Bases	AMERICAN MILITARY
ARG	Grand Forks, ND	GRAND FORKS
BIH	Hibbing, MN	
BNAS	San Bernardino, CA	SAN BERNARDINO
BOM	Mobile, AL	MOBILE
BUL	Lubbock, TX	LUBBOCK
BWEN	New Bern, NC	NEW BERN
CAM	Macon, GA	MACON
CAS	Sacramento, CA	SACRAMENTO
CAT	Tacoma, WA	TACOMA
CAW	Waco, TX	WACO
CIR	Richmond, VA	RICHMOND
C IRT	Shoals Valley	SHOALS VALLEY
CIW	Wichita, KS	WICHITA
CKAL	Lake Charles, LA	LAKE CHARLES
CNA	Anchorage, AK	ANCHORAGE
C NED	Denver, CO	COLORADO
COIS	Sioux City, IA	SIOUX CITY
COP	Pocatello, ID	POCATELLO

<u>Cipher</u>	<u>Name of Valley</u>	<u>Name of Consistory</u>
COR	Rochester, MN	ROCHESTER
CS TF	Fort Scott, KS	FORT SCOTT
CUT	Tucson, AZ	TUCSON
DEC	Cedar Rapids, IA	CEDAR RAPIDS
DEM	Medford, OR	MEDFORD
DERF	Frederick, MD	
DNAL	Lander, WY	LANDER
DNAS	San Diego, CA	SAN DIEGO
DNEP	Pendleton, OR	
EBA	Aberdeen, SD	ABERDEEN
EFNAS	Santa Fe, NM	SANTA FE
EHC	Cheyenne, WY	CHEYENNE
EHS	Sheridan, WY	SHERIDAN
EHW	Wheeling, WV	WHEELING
EKAB	Bakersfield, CA	BAKERSFIELD
ELA	Alexandria, VA	ALEXANDRIA
EOC	Coeur d'Alene, ID	COEUR D'ALENE
ERA	Arecibo, PR	
ERB	Bremerton, WA	BREMERTON
ERF	Fresno, CA	FRESNO
ERG	Greenville, SC	GREENVILLE
EUP	Pueblo, CO	SOUTHERN COLORADO
EVE	Everett, WA	EVERETT
F CAJ	Jacksonville, FL	JACKSONVILLE
F NAS	San Fernando Valley, CA	SAN FERNANDO VALLEY
FNE	Enfield, NC	
FOIS	Sioux Falls, SD	SIOUX FALLS
GAC	Caguas, PR	
G LOC	Columbus, GA	COLUMBUS
G OIR	Rio Grande, TX	
GOL	Logan, WV	
GUA	Augusta, GA	AUGUSTA
GUE	Eugene, OR	EUGENE
H COR	Rock Hill, SC	
HAK	Kahului, HI	MAUI
HSA	Asheville, NC	ASHEVILLE
IAF	Fairbanks, AK	FAIRBANKS
IAT	Taipei, Taiwan	TAIPEI
IDAM	Madisonville, KY	WEST KENTUCKY
IKO	Kitanakagusuku, Okinawa.	OKINAWA
ILAS	Salina, KS	SALINA
ILC	Clinton, IA	CLINTON
IOB	Boise, ID	BOISE
JARG	Grand Junction, CO	GRAND JUNCTION
JNAS	San Jose, CA	SAN JOSE
J TS	St. Joseph, MO	ST. JOSEPH
K NAK	Northeast Kansas, KS	NORTHEAST KANSAS



<u>Cipher</u>	<u>Name of Valley</u>	<u>Name of Consistory</u>
KAB	Baker, OR	BAKER
KAO	Oakland, CA	OAKLAND
KAY	Yakima, WA	YAKIMA
KIA	Aiken, SC	
KOT	Tokyo, Japan	TOKYO
LAB	Balboa, Panama Canal	PANAMA CANAL
LAD	Dallas, TX	DALLAS
LAG	Galveston, TX	GALVESTON
LAP	Palm Springs, CA	PALM SPRINGS
LAR	Raleigh, NC	RALEIGH
LAS	Salem, OR	SALEM
LAT	Tallahassee, FL	TALLAHASSEE
LAW	Walla Walla, WA	WALLA WALLA
LEB	Bellingham, WA	BELLINGHAM
LEH	Helena, MT	HELENA
LEK	Kelso, WA	KELSO
LIB	Billings, MT	BILLINGS
LIH	Hilo, HI	HILO
LIW	Wilmington, NC	WILMINGTON
LLA	Alliance, NE	ALLIANCE
LRO	Orlando, FL	ORLANDO
LTA	Atlanta, GA	ATLANTA
L TF	Ft. Leavenworth, KS	ARMY
L TS	St. Louis, MO	ST. LOUIS
LUD	Duluth, MN	DULUTH
LUG	Gulfport, MS	GULFPORT
LUT	Tulsa, OK	TULSA
M ALC	Clarksdale, MS	DELTA
M CAJ	Jackson, MS	JACKSON
M LOC	Columbia, MO	COLUMBIA
M NAK	Kansas City, MO	KANSAS CITY
M SEW	Western Montana, MT	WESTERN MONTANA
M TF	Fort Myers, FL	FORT MYERS
MAT	Tampa, FL	TAMPA
MAUG	Agana, Guam, M.I.	GUAM
MEM	Memphis, TN	MEMPHIS
MS TF	Fort Smith, AR	WESTERN ARKANSAS
MUC	Cumberland, MD	CUMBERLAND
MUH	Humacao, PR	
NAD	Danville, VA	DANVILLE
N AHC	Charlotte, NC	CAROLINA
NAL	Langdon, ND	LANGDON
NANAS	Santa Ana, CA	SANTA ANA
NAP	Panama City, FL	PANAMA CITY
NAV	Vancouver, WA	VANCOUVER
NAY	Yankton, SD	YANKTON
NEK	Kennewick, WA	KENNEWICK

<u>Cipher</u>	<u>Name of Valley</u>	<u>Name of Consistory</u>
NEP	Pensacola, FL	PENSACOLA
NER	Reno, NV	RENO
NEV	Ventura, CA	VENTURA
NEW	Wenatchee, WA	WENATCHEE
NIL	Lincoln, NE	LINCOLN
NIM	Minneapolis, MN	MINNEAPOLIS
NOH	Honolulu, HI	HONOLULU
NOL	Long Beach, CA	LONG BEACH
NOM	Montgomery, AL	MONTGOMERY
NOP	Ponce, PR	
NUH	Huntington, WV	HUNTINGTON
NUJ	Juneau, AK	ALASKA
N WEN	Newport News, VA	NEWPORT NEWS
NYL	Lynchburg, VA	LYNCHBURG
OBERG	Greensboro, NC	GREENSBORO
OES	Seoul, Korea	SEOUL
OHP	Phoenix, AZ	PHOENIX
ONK	Knoxville, TN	KNOXVILLE
OOC	Coos Bay, OR	COOS BAY
OPS	Spokane, WA	SPOKANE
OTS	Stockton, CA	STOCKTON
OWEN	New Orleans, LA	NEW ORLEANS
PLE	El Paso, TX	EL PASO
POJ	Joplin, MO	JOPLIN
POT	Topeka, KS	TOPEKA
P TS	St. Paul, MN	ST. PAUL
QOH	Hoquiam, WA	GRAYS HARBOR
RAF	Fargo, ND	FARGO
RAP	Parkersburg, WV	PARKERSBURG
RCSAL	Las Cruces, NM	LAS CRUCES
REM	Meridian, MS	MERIDIAN
RHS	Shreveport, LA	SHREVEPORT
RIB	Birmingham, AL	BIRMINGHAM
RNOM	Monroe, LA	MONROE
ROC	Corinth, MS	CORINTH
ROM	Morgantown, WV	
RON	Norfolk, VA	NORFOLK
ROP	Portland, OR	OREGON
RPNAS	San Juan, PR	SAN JUAN
RTNAS	Santa Rosa, CA	SANTA ROSA
RUB	Burlingame, CA	BURLINGAME
SAH	Hastings, NE	HASTINGS
S AHC	Charleston, SC	DALCHO
SAL	Las Vegas, NV	LAS VEGAS
SAN	Nashville, TN	TRINITY
SAP	Pasadena, CA	PASADENA
SAW	Washington, DC	ALBERT PIKE

<u>Cipher</u>	<u>Name of Valley</u>	<u>Name of Consistory</u>
SED	Des Moines, IA	DES MOINES
SEW	Jonesboro, AR	EASTERN ARKANSAS
SIB	Bismarck, ND	BISMARCK-MANDAN
SILAS	Salisbury, MD	
S LOC	Columbia, SC	COLUMBIA
S NAS	San Francisco, CA	SAN FRANCISCO
SNIW	Winston-Salem, NC	WINSTON-SALEM
SOL	Los Angeles, CA	LOS ANGELES
SOR	Roseburg, OR	ROSEBURG
SUA	Austin, TX	AUSTIN
TAB	Baton Rouge, LA	BATON ROUGE
TAH	Hattiesburg, MS	HATTIESBURG
TEK	Ketchikan, AK	
TIL	Little Rock, AR	ARKANSAS
TLAB	Baltimore, MD	CHESAPEAKE
TLAS	Salt Lake City, UT	UTAH
TNUH	Huntsville, AL	HUNTSVILLE
TOD	Dothan, AL	DOTHAN
TONIM	Minot, ND	MINOT
TRAM	Martinsburg, WV	
TROP	Portsmouth, VA	PORTSMOUTH
TUB	Butte, MT	BUTTE
TUG	Guthrie, OK	GUTHRIE
ULB	Bluefield, WV	
UOH	Houston, TX	HOUSTON
UOL	Louisville, KY	LOUISVILLE
VAD	Davenport, IA	DAVENPORT
VAS	Savannah, GA	SAVANNAH
VIL	Livingston, MT	LIVINGSTON
VOC	Covington, KY	INDRA
W AHC	Charleston, WV	CHARLESTON
WAL	Lawrence, KS	LAWRENCE
WEL	Lewiston, ID	LEWISTON
WKAL	Lake Worth, FL	LAKE WORTH
XEL	Lexington, KY	LEXINGTON
YAC	Cayey, PR	
W TF	Fort Worth, TX	FORT WORTH
YAM	Mayaguez, PR	
YEK	Key West, FL	KEY WEST
YLO	Olympia, WA	OLYMPIA

77. ORIENT & VALLEY CIPHERS AND NUMBERS

	<u>CIPHER</u>	<u>ORIENT VALLEY #</u>	
<u>ALABAMA</u>		010	
Birmingham	RIB	010	05
Dothan	TOD	010	10
Huntsville	TNUH	010	15
Mobile	BOM	010	20
Montgomery	NOM	010	25
Shoals Valley	C IRT	010	30
<u>ALASKA</u>		030	
Anchorage	CNA	030	05
Fairbanks	IAF	030	10
Juneau	NUJ	030	15
Ketchikan	TEK	030	20
<u>ARIZONA</u>		050	
Phoenix	OHP	050	05
Tucson	CUT	050	10
<u>ARKANSAS</u>		070	
Fort Smith	MS TF	070	05
Little Rock	TIL	070	10
Jonesboro	SEW	070	15
<u>CALIFORNIA</u>		100	
Bakersfield	EKAB	100	05
Burlingame	RUB	100	10
Fresno	ERF	100	15
Long Beach	NOL	100	20
Los Angeles	SOL	100	25
Northern California	LAC N	100	28
Oakland	KAO	100	30
Palm Springs	LAP	100	33
Pasadena	SAP	100	35
Sacramento	CAS	100	40
San Bernardino	BNAS	100	45
San Diego	DNAS	100	50
San Fernando Valley	F NAS	100	55
San Francisco	S NAS	100	60
San Jose	JNAS	100	65
Santa Ana	NANAS	100	73
Santa Barbara	ABNAS	100	70

	<u>CIPHER</u>	<u>ORIENT VALLEY #</u>	
Santa Rosa	RTNAS	100	75
Stockton	OTS	100	80
Ventura	NEV	100	83
<u>COLORADO</u>		160	
Denver	C NED	160	05
Grand Junction	JARG	160	15
Pueblo	EUP	160	20
<u>DISTRICT OF COLUMBIA</u>		190	
Washington	SAW	190	05
<u>FLORIDA</u>		220	
Fort Myers	M TF	220	05
Jacksonville	F CAJ	220	10
Key West	YEK	220	15
Lake Worth	WKAL	220	20
Miami	AIM	220	25
Ocala	ACO	220	30
Orlando	LRO	220	35
Panama City	NAP	220	40
Pensacola	NEP	220	45
Tallahassee	LAT	220	55
Tampa	MAT	220	60
<u>GEORGIA</u>		230	
Albany	ABLA	230	05
Atlanta	LTA	230	10
Augusta	GUA	230	15
Columbus	G LOC	230	20
Macon	CAM	230	25
Savannah	VAS	230	30
<u>HAWAII AND GUAM</u>		270	
Agana, Guam, M.I.	MAUG	640	10
Hilo	LIH	270	05
Honolulu	NOH	270	10
Kahului	HAK	270	15

	<u>CIPHER</u>	<u>ORIENT VALLEY #</u>	
<u>IDAHO</u>		290	
Boise	IOB	290	05
Coeur d'Alene	EOC	290	10
Lewiston	WEL	290	15
Pocatello	COP	290	20
<u>IOWA</u>		320	
Cedar Rapids	DEC	320	05
Clinton	ILC	320	10
Davenport	VAD	320	15
Des Moines	SED	320	20
Sioux City	COIS	320	25
<u>JAPAN, KOREA AND OKINAWA</u>		340	
Kitanakagusuku, Okinawa	IKO	640	05
Tokyo, Japan	KOT	340	05
Seoul, Korea	OES	340	15
<u>KANSAS</u>		360	
Fort Leavenworth	L TF	360	05
Fort Scott	CS TF	360	10
Northeast Kansas	K NAK	360	15
Lawrence	WAL	360	20
Salina	ILAS	360	25
Topeka	POT	360	30
Wichita	CIW	360	35
<u>KENTUCKY</u>		380	
Covington	VOC	380	05
Lexington	XEL	380	10
Louisville	UOL	380	15
Madisonville	IDAM	380	20
<u>LOUISIANA</u>		400	
Baton Rouge	TAB	400	05
Lake Charles	CKAL	400	10
Monroe	RNOM	400	15
New Orleans	OWEN	400	20
Shreveport	RHS	400	25

	<u>CIPHER</u>	<u>ORIENT VALLEY #</u>	
<u>MARYLAND</u>		420	
Baltimore	TLAB	420	05
Cumberland	MUC	420	10
Frederick	DERF	420	15
Salisbury	SILAS	420	20
Southern Maryland	UOS	420	25
<u>MINNESOTA</u>		450	
Duluth	LUD	450	05
Hibbing	BIH	450	10
Minneapolis	NIM	450	15
Rochester	COR	450	18
St. Paul	P TS	450	20
<u>MISSISSIPPI</u>		470	
Corinth	ROC	470	05
Clarksdale	M ALC	470	10
Gulfport	LUG	470	15
Hattiesburg	TAH	470	20
Jackson	M CAJ	470	25
Meridian	REM	470	30
<u>MISSOURI</u>		490	
Columbia	M LOC	490	05
Joplin	POJ	490	10
Kansas City	M NAK	490	15
St. Joseph	J TS	490	20
St. Louis	L TS	490	25
<u>MONTANA</u>		510	
Billings	LIB	510	05
Butte	TUB	510	10
Great Falls	AFERG	510	15
Helena	LEH	510	20
Livingston	VIL	510	25
Western Montana	M SEW	510	30
<u>NATO BASES</u>		515	
American Military	ARF G	515	05

	<u>CIPHER</u>	<u>ORIENT VALLEY #</u>	
<u>NEBRASKA</u>		530	
Alliance	LLA	530	05
Hastings	SAH	530	10
Lincoln	NIL	530	15
Omaha	AMO	530	20
<u>NEVADA</u>		550	
Las Vegas	SAL	550	05
Reno	NER	550	10
<u>NEW MEXICO</u>		580	
Las Cruces	RCSAL	580	05
Santa Fe	EFNAS	580	10
<u>NORTH CAROLINA</u>		600	
Asheville	HSA	600	05
Charlotte	N AHC	600	10
Enfield	FNE	600	15
Greensboro	OBERG	600	20
New Bern	BWEN	600	25
Raleigh	LAR	600	30
Wilmington	LIW	600	35
Winston-Salem	SNIW	600	40
<u>NORTH DAKOTA</u>		620	
Bismarck	SIB	620	05
Fargo	RAF	620	15
Grand Forks	ARG	620	20
Langdon	NAL	620	25
Minot	TONIM	620	30
<u>OKLAHOMA</u>		660	
Guthrie	TUG	660	05
McAlester	A CM	660	10
Tulsa	LUT	660	15



	<u>CIPHER</u>	<u>ORIENT VALLEY #</u>	
<u>OREGON</u>		680	
Baker	KAB	680	05
Coos Bay	OOO	680	10
Eugene	GUE	680	15
Klamath Falls	ALK	680	20
Medford	DEM	680	25
Pendleton	DNEP	680	30
Portland	ROP	680	35
Roseburg	SOR	680	40
Salem	LAS	680	45
<u>PANAMA CANAL</u>		120	
Balboa	LAB	120	05
<u>PUERTO RICO</u>		710	
Arecibo	ERA	710	05
Caguas	GAC	710	10
Cayey	YAC	710	15
Humacao	MUH	710	20
Mayaguez	YAM	710	30
Ponce	NOP	710	35
San Juan	RPNAS	710	40
<u>SOUTH CAROLINA</u>		730	
Aiken	KIA	730	05
Charleston	S AHC	730	10
Columbia	S LOC	730	15
Greenville	ERG	730	20
Rock Hill	H COR	730	23
Spartanburg	APS	730	25
<u>SOUTH DAKOTA</u>		750	
Aberdeen	EBA	750	05
Deadwood	AED	750	10
Sioux Falls	FOIS	750	15
Yankton	NAY	750	20
<u>TAIWAN AND CHINA</u>		140	
Taipei, Taiwan	IAT	140	15

	<u>CIPHER</u>	<u>ORIENT VALLEY #</u>	
<u>TENNESSEE</u>		790	
Chattanooga	AHC	790	05
Knoxville	ONK	790	10
Memphis	MEM	790	15
Nashville	SAN	790	20
<u>TEXAS</u>		820	
Austin	SUA	820	05
Dallas	LAD	820	10
El Paso	PLE	820	15
Fort Worth	W TF	820	18
Galveston	LAG	820	20
Houston	UOH	820	25
Lubbock	BUL	820	27
Rio Grande	G OIR	820	28
San Antonio	ANAS	820	30
Waco	CAW	820	35
<u>UTAH</u>		850	
Salt Lake City	TLAS	850	05
<u>VIRGINIA</u>		870	
Alexandria	ELA	870	05
Danville	NAD	870	10
Lynchburg	NYL	870	15
Newport News	N WEN	870	20
Norfolk	RON	870	25
Portsmouth	TROP	870	30
Richmond	CIR	870	35
Roanoke	AOR	870	40
<u>WASHINGTON</u>		890	
Bellingham	LEB	890	05
Bremerton	ERB	890	10
Everett	EVE	890	15
Hoquiam	QOH	890	20
Kelso	LEK	890	25
Kennewick	NEK	890	30
Olympia	YLO	890	35
Seattle	AES	890	40
Spokane	OPS	890	45
Tacoma	CAT	890	50

	<u>CIPHER</u>	<u>ORIENT VALLEY #</u>	
Vancouver	NAV	890	53
Walla Walla	LAW	890	55
Wenatchee	NEW	890	60
Yakima	KAY	890	65
<u>WEST VIRGINIA</u>		910	
Bluefield	ULB	910	05
Charleston	W AHC	910	10
Clarksburg	ALC	910	15
Huntington	NUH	910	20
Logan	GOL	910	25
Martinsburg	TRAM	910	30
Morgantown	ROM	910	35
Parkersburg	RAP	910	40
Wheeling	EHW	910	45
<u>WYOMING</u>		930	
Cheyenne	EHC	930	05
Lander	DNAL	930	08
Sheridan	EHS	930	10

## 78. LIFE MEMBERSHIP GUIDELINES AS PRESCRIBED BY THE SUPREME COUNCIL

1. Any member in good standing in a Lodge of Perfection whose dues are paid to date may purchase a life membership and thereby be relieved from the further payment of dues, subject to the provisions hereby set forth.

2. Members aged 74 or younger may purchase a life membership for not less than \$500.00. Members who have attained the age of 75 or older may purchase a life membership for not less than \$200.00.

3. All Valley plans for life memberships shall be submitted to the Sovereign Grand Commander for approval prior to implementation, and an audited report of the status of the plan shall be submitted annually to the Sovereign Grand Commander on or before April 15 each year.

4. The total fee for a life membership shall be collected by the Lodge of Perfection and the Secretary shall immediately deposit all monies so received in a life membership fund.

5. The fund shall be invested and reinvested from time to time, under the supervision of the Inspector General's Personal Representative or his designate, according to the investment guidelines of the Supreme Council. The interest from such funds may be distributed annually to the General Fund of the Lodge of Perfection. In no event shall the corpus of the fund ever be removed, except as provided for in item 6 following.

6. The Secretary shall issue to the member paying the required fee a life membership certificate under the seal of the Lodge of Perfection, signed by the Venerable Master and attested to by the Secretary.

7. If the holder of a life membership transfers by a Certificate of Good Standing or Demit from one Lodge of Perfection to another in the same Orient, he may transfer his life membership with him. However, if he transfers to a Lodge of Perfection in another Orient, or in another Jurisdiction, the fee paid for his life membership shall remain in the life membership fund of the Lodge of Perfection from which it was purchased.

8. A Life Member who, for any reason, has ceased to be a member of his Symbolic Lodge with a consequent loss of membership in his Scottish Rite Bodies, shall, upon being restored to membership in his Scottish Rite Bodies, be restored as a Life Member in those Bodies.

9. Lodges of Perfection are prohibited from donating or selling life memberships in any manner other than hereby specified except that a Lodge may, by vote, purchase from its funds a life membership for a member thereof, paying the appropriate fee designated in item 2 above.

10. When two or more Lodges of Perfection consolidate, all money in the life membership fund to the credit of such Lodges shall be transferred to the credit of the life membership fund of the remaining Lodge.

11. Upon the dissolution or demise of any Lodge of Perfection, holders of life membership certificates affiliating with another Lodge of Perfection shall have the funds transferred to that Lodge.

12. The holder of a life membership certificate shall be subject to all the laws and regulations as provided in the Statutes of the Supreme Council, and loss of membership by suspension, expulsion, or death, or loss of membership in his Blue Lodge shall automatically abrogate his life membership and any claim by such member or family or survivor to any portion of any fees paid for such life membership. The Lodge of Perfection of which he was last a member shall continue to receive the income from such fund.

13. Anyone may purchase a life membership in honor of or in memory of a member of a Lodge of Perfection.

## 79. ONLINE DUES PAYMENTS AND CONTRIBUTIONS

Members now have an online option for paying their membership dues and making charitable contributions. They may access this service at [www.scottishrite.org](http://www.scottishrite.org) under the heading *Member Programs*, by clicking the “Pay Your Dues Online” link on the home page, or at <http://dues.scottishrite.org>. All payments are secured through Authorize.net, and managed by the Supreme Council’s Office of Finance. Each time a member uses the online payment system, an email of the activity is sent to the Valley’s “official” email address, and the payment is automatically applied to the member’s account in the Sentinel system. Thus, Valley staff members do not have to enter the payments in Sentinel. However, it is the Valley’s responsibility to ensure that the correct amount of money was collected and applied to the member’s Sentinel account, and to reinstate any member that was previously suspended. *Also, All Valleys must ensure that members’ dues information is current in Sentinel so that the online payment system will reflect the correct dues amount.*

Per capita will be withheld for any member for whom the Valley has not paid per capita. Visa, Discover, Master Card, and American Express are accepted. Valleys for which the Supreme Council has processed online payments will receive a detailed monthly report along with a check for reimbursement.

## REFERENCE SECTION

Annual Schedule of Outputs to and Inputs from Valley

Affiliation Requirements

Restriction on Affiliation/Initiation of Brothers under the Jurisdiction of the Supreme Council of England & Wales

Restriction on Affiliation/Initiation of Brother under the Jurisdiction of the Supreme Council of Scotland

Restriction on Affiliation/Initiation of Brother under the Jurisdiction of the Supreme Council of Canada

Waiver of Jurisdiction

A Membership Primer

Electronic Petitions

Twenty-five Year

50-Year Membership Awards

Pamphlets Available from the Supreme Council

*A Bridge to Light*

*Albert Pike's Morals & Dogma: Annotated Edition*

File Request for Sojourner Labels or Rosters

14° Initiation Date Roster and/or Labels Order Form

Scottish Rite Youth Recognition Program for JROTC Enrollees

Scottish Rite Youth Recognition Program for ROTC Enrollees

Disposition of Valley Property

Financial Accounting of Scottish Rite Programs and Activities

Investment Policies and Guidelines

Guidelines for Almoners of Scottish Rite Bodies

Records Retention Schedule

## YEAR 2012 ANNUAL SCHEDULE OF OUTPUTS TO AND INPUTS FROM VALLEYS

### January:

Valleys must process year-end suspensions in the Sentinel system by **January 29, 2012**.  
Form for Ordering Blank Reporting Forms Emailed to Valleys.  
Questionnaire for Profile of Fees, Dues, and Reunions Emailed to Valleys.  
Form for reporting 2011 Valley officers due from Valleys by **January 10, 2012**.

### February:

Annual Reports processed and distributed to Actives, Deputies, and Valley Secretaries.

### March:

Invoices for Balance Due on 2011 Per Capita Assessment sent to Valleys.  
2012 Follow-up Dues Notices mailed to members of Valleys using Membership Billing Services  
2013 ID Card Information Form and 2013 ID Card Authorization Form (Membership Billing Services) emailed to Valleys.

### April:

Report of Spring Initiates to the Supreme Council due from Valley following Reunion.

### May:

Report of Spring Initiates to the Supreme Council due from Valley following Reunion.  
Dues Documentation Form emailed to Valleys using Membership Billing Services.

### June:

Report of Spring Initiates to the Supreme Council due from Valley following Reunion.  
Request for Copies of Valley's IRS Form 990 and Audits for Supreme Council's Files  
ID Cards for the Year 2013 printed and mailed to Valleys.

### July: Open

### August (tentative)

2013 Dues Notices mailed to members of Valleys using Membership Billing Services.  
Follow-up Dues Reminder Form Emailed to Valleys using Membership Billing Services.

### September

Report of Fall Initiates to the Supreme Council due from Valley following Reunion.  
Ritual Inventory Form Emailed to Valley.

### October:

Report of Fall Initiates to the Supreme Council due from Valley following Reunion.

### November:

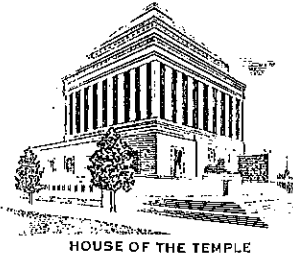
Report of Fall Initiates to the Supreme Council due from Valley following Reunion.  
Labels, Rosters, and Downloads Order Form for 2012 sent to Valleys currently ordering items.

### December:

Invoice for 90% of Year 2012 Per Capita Assessment mailed to Valleys.  
Form for reporting officers for 2012 Emailed to Valleys.

The Supreme Council  
MOTHER COUNCIL OF THE WORLD  
OF THE  
THIRTY-THIRD AND LAST DEGREE

WILLIAM G. SIZEMORE, 33°  
REAR ADMIRAL, USN (RET.)  
GRAND EXECUTIVE DIRECTOR



HOUSE OF THE TEMPLE

1733 SIXTEENTH STREET, N. W.  
WASHINGTON, D. C. 20009-3199  
TELEPHONE 202-232-3579  
CABLE SCSJUSA  
FAX 202-387-1843

ANCIENT AND ACCEPTED SCOTTISH RITE OF  
FREEMASONRY, SOUTHERN JURISDICTION, U. S. A.

February 13, 1995

TO: ALL SECRETARIES

FROM: William G. Sizemore



*William G. Sizemore*

33°, G.C.

Grand Executive Director

RE: Affiliation Procedure

It has come to our attention that in some instances, Brethren are being elected for affiliation without the member first securing the required Certificate of Good Standing or Demit from the Bodies in which he holds membership. This requirement is spelled out in Paragraph 1 of the Secretary's Manual and in Article XVII, Section 20 of the Statutes. A current dues card may not be used in lieu of the Certificate or Demit for purposes of affiliation. No Brother should be elected as an affiliate until one of the required documents is presented to the affiliating Valley.

Also pertinent to this matter is the fact that a Certificate of Good Standing expires at the end of the calendar year in which it is issued, so unless the entire affiliation process (securing the Certificate and being elected by the affiliating Valley) can be completed before the end of a year, the process will have to be begun anew in the following year.

Regardless of whether a Certificate of Good Standing or a Demit is requested for the purpose of affiliation, the document must be secured before, not after the fact, and the Secretary of the issuing Valley should not be asked to back-date the document.

Your adherence to this requirement will assure Masonic harmony among our Valleys.



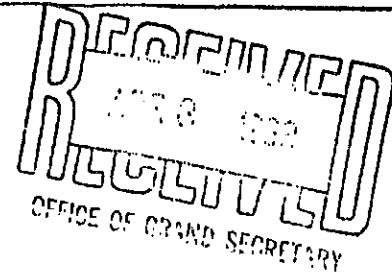
# MEMORANDUM from the Grand Commander...

THE SUPREME COUNCIL 33°

ANCIENT & ACCEPTED SCOTTISH RITE OF FREEMASONRY  
SOUTHERN JURISDICTION UNITED STATES OF AMERICA

1733 SIXTEENTH STREET, N.W.  
WASHINGTON, D.C. 20009

July 8, 1986



TO ALL ACTIVE MEMBERS, DEPUTIES,  
CHAIRMEN AND SECRETARIES

Dear Brethren:

A delicate situation has arisen between our Supreme Council and that of England and Wales.

Progress through the Scottish Rite Degrees is over a much longer period of time under their practice. Accordingly, to prevent possible embarrassment resulting from the more rigid advancement of English Scottish Rite brethrens' affiliating with Bodies under our jurisdiction, please note the following directive:

No Body may admit for affiliation or initiation a brother under the jurisdiction of The Supreme Council of England and Wales without first receiving the authority of such Supreme Council to do so.

With best wishes,

Cordially and fraternally yours,

  
Sovereign Grand Commander 

CFK:bj

C. FRED KLEINKNECHT, 33°  
Sovereign Grand Commander

# MEMORANDUM *from the Grand Commander...*

THE SUPREME COUNCIL 33°

ANCIENT & ACCEPTED SCOTTISH RITE OF FREEMASONRY  
SOUTHERN JURISDICTION UNITED STATES OF AMERICA

1733 SIXTEENTH STREET, N.W.  
WASHINGTON, D.C. 20009

June 21, 1988

TO ALL ACTIVE MEMBERS, DEPUTIES,  
CHAIRMEN AND SECRETARIES

Dear Brethren:

A delicate situation has arisen between our Supreme Council and that of Scotland.

Progress through the Scottish Rite Degrees is over a much longer period of time under their practice. Accordingly, to prevent possible embarrassment resulting from the more rigid advancement of the Scottish Rite Brethren of Scotland affiliating with Bodies under our jurisdiction, please note the following directive:

No Body may admit for affiliation or initiation a Brother under the jurisdiction of The Supreme Council of Scotland without first receiving the authority of such Supreme Council to do so.

With best wishes,

Cordially and fraternally yours,

A handwritten signature in cursive script, reading "C. Fred Kleinknecht". To the left of the signature is a small decorative emblem consisting of a cluster of dots. To the right is a circular emblem with a sunburst design and the number "33" in the center.

Sovereign Grand Commander

CFK:ca

# The Supreme Councillor

THE SUPREME COUNCIL  
Ancient and Accepted Scottish Rite of Freemasonry  
of Canada



ROUND-UP  
Calgary  
1996

IN THE SHADOW OF THE ROCKIES

EDITION NO. 53

Supreme Council  
September 12-14, 1996

NOVEMBER 1996

Calgary, Alberta

## A CAUTION TO CRAFT MASONS CONSIDERING MEMBERSHIP IN ROYAL ARCH MASONRY OR IN THE SCOTTISH RITE SOUTH OF THE BORDER

*(The following article was written in an attempt to contact master masons who might be contemplating joining the Scottish Rite or Royal Arch Masonry in a jurisdiction outside of Canada. Although the article refers to Ontario, the problem exists across Canada. It is included in this issue of the Supreme Councillor in order that all Scottish Rite members might be aware that there is a problem and be in a position to caution master masons should the need arise.)*

The purpose of this article is not to espouse the cause of Royal Arch Masonry or of the Scottish Rite. This article is addressed to Ontario Craft lodge members who are NOT members of any Royal Arch chapters or bodies of the Scottish Rite in Canada, but who may be contemplating joining Royal Arch Masonry or the Scottish Rite in a jurisdiction outside of Canada.

Some craft masons who spend a good amount of time, particularly during the winter months, in warmer climates to the south, have made enquiries about joining either Royal Arch or the Scottish Rite when they are conveniently located in one of the States or other masonic jurisdictions to the South. They generally are accepted with open arms subject to some proof that indeed they are Masons.

On joining either a Royal Arch Chapter or any Scottish Rite body south of the border and on later returning to their homes in Canada they are much dismayed to learn that their membership in such "American" Royal Arch Chapter or Body of the Rite, is not accepted for admission—or even affiliation—in a comparable body here in Canada. Some brethren

have become so upset over this situation as to turn them off masonry generally, so completely, that they take demits from their Craft lodge here. This is upsetting generally to the Grand Council of Royal Arch Masons of Canada in Ontario and to the Supreme Council of the Ancient and Accepted Scottish Rite of Freemasonry of Canada. The erring brother has without any warning been lulled into membership in a foreign Chapter or body of the Rite, and when he finds out the trap he has fallen into—no wonder he is dismayed. Unfortunately, all of us are bound by a very general principle of the "law"—"ignorance of the law is no excuse".

Brethren contemplating such a move are well advised to seek competent advice BEFORE proceeding with membership.

In a general way, the following sets forth the requirements of the Grand Chapter of Royal Arch Masons of Canada in Ontario, and of the Supreme Council of the Ancient and Accepted Scottish Rite of Freemasonry of Canada, as specifically set forth in the Constitution of the Grand Chapter and in the Statutes and Regulations of Supreme Council.

In general, membership in any body in Canada, Royal Arch or Scottish Rite, is based on "residence" of the applicant. It is not based on nationality, citizenship, temporary residence or wherever you may happen to be at the time of applying for membership. Most of the American chapters and bodies of the Rite do not have "residence" clearly as a prime requirement for membership—subject to certain exceptions. In addition, in Ontario, application for membership and continuing membership in the Royal Arch or the Supreme Council is maintenance of a membership in good standing at all times (at the time of joining and thereafter) in a Craft lodge in Canada.

## WAIVER OF JURISDICTION

(Statutes, Article XVII, Regulations Affecting Candidates and Members)

- SEC. 3. No person who is an actual resident within the territorial jurisdiction of a Body of the Rite within the general jurisdiction of this Supreme Council can lawfully obtain any of the Degrees from any other officer or Body under the jurisdiction of any other Supreme Council, unless written consent and waiver of jurisdiction shall have been obtained from the Sovereign Grand Commander and the Sovereign Grand Inspector General or Deputy of the Supreme Council in charge of the state or territory in which the Brother resides, except as provided in Paragraph 2 of this section.
- [2] Nor will any person who is a citizen within the territorial jurisdiction of any other Supreme Council be permitted to obtain any of the Degrees from any officer or Body of this jurisdiction until the written consent and waiver of jurisdiction shall have been obtained from the Sovereign Grand Commander or proper official of such foreign Supreme Council, provided, however, where the waiver of jurisdiction is requested between the Supreme Councils of the Northern and Southern Jurisdictions of the Scottish Rite for an American citizen, then the waiver may be obtained from the Sovereign Grand Inspector General or Deputy of the Supreme Council in the state or territory in which the Brother resides or is affiliated.



RONALD A. SEALE, 33°, SOVEREIGN GRAND COMMANDER  
A.: & A.: Scottish Rite of Freemasonry, Southern Jurisdiction, USA

Memo

The Supreme Council, 33°  
1733 Sixteenth Street, NW  
Washington, DC 20009-3103

Telephone: 202-232-3579  
Facsimile: 202-464-0487  
grandcmdr@scottishrite.org

August 5, 2010

TO: Active Members and Deputies of the Supreme Council, Personal  
Representatives, and Secretaries

FROM: Ronald A. Seale

  
SOVEREIGN GRAND COMMANDER

RE: A Membership Primer

---

Gentlemen:

I trust that the dog days of summer are finding you well and the August heat has not sapped your enthusiasm for Scottish Rite efforts. In many areas of our Jurisdiction, Valleys are dark until the fall. Even so, this doesn't prevent our working on membership efforts and contacting those members who are in danger of being suspended NPD by the end of the year.

There is good news and not so good news with respect to our membership efforts. First, the positive side: Dean Alban, our Director of Membership Services, reports that new initiates recorded thus far in our system are up in the first half of 2010 over the same time in 2009 by a whopping 18%! As all of our Valleys have not yet reported their spring reunions, we could even see more positive numbers. Congratulations to all who have worked hard to spread the word about Scottish Rite opportunities in their area. We all have reason to be encouraged about this effort.

However, here is the not-so-good area: *We have some 10,000 members who are two or more years in arrears in their dues and are thus subject to suspension at the end of this year.* If the majority of these members leave, we will have another 4% loss in members for failure to pay dues. As a matter of fact, the anticipated loss approaches 4.5%, an increase over last year. This is something that needs our immediate attention. We can fix this if we choose to do so.

You will recall the New Orleans Leadership Conference in the spring of 2010. Hopefully, you were present. If not, I trust you have received an informative report from others who could participate. In the conference we focused on the Brother to Brother membership initiative. "Brother to Brother" is aptly described by its title. Unfortunately, so many of our members hear from us only in the form of a dues notice as yearend approaches. Maybe he gets a phone call only to be told that he hasn't paid his bill. If this

is the extent of our outreach to our membership, why should we be surprised at losing significant numbers through suspension? As a reminder, in 2009 our Southern Jurisdiction experienced a net loss of 6.1% of our membership and of that amount 4.1% was suspension for failure to pay dues, almost 10,000 members! Once again, we find ourselves in the same boat. These are Masons who have knelt at our altars, witnessed our degrees and left our Reunions expecting to be treated as Brothers. What did they receive?

This is not to be critical of anyone but hopefully a fair assessment of us all, including me. Perhaps we have more work to do in this area and our Orients and Valleys will benefit from our labors. More importantly, we are returning to the purest form of Masonry – one Brother reaching out and supporting another. Lessons as old as the Blue Lodge itself.

In Brother to Brother, we pledge to contact our members at least once during the year by phone if at all possible and certainly before suspending an individual for non-payment of a dues invoice. Will we reclaim all? No, but certainly we will see a significant number remain particularly if they are made to feel included and valued as a Brother.

Can we do it? For sure. How to start? I am attaching a list for each Orient, sorted by Valleys, that contains the list of all current members subject to suspension by the end of this year. **CALL THESE MEN.** Here is a money-back guarantee: If you call these men and talk with them, maybe more than once, you will see an improvement in your Valley's end of year suspension rate. And beyond that, you are practicing your Masonry.

Speaking of dues payable, this is one of the areas that is easy to get confused about. Remember, dues are payable each year in advance. Thus, on December 31, 2010, dues are payable for 2011 in order to hold a valid 2011 dues card. If the 2011 dues are not paid by December 31, 2011, the member is in arrears for one year at that point.

Now, with respect to those members who have previously left our ranks, experience has shown over and over again that if we give them a call and invite them to come back that many will choose that option. Not all, but many—almost 30%, if you use the program properly. To make it easier for those Masons seeking restoration of their Scottish Rite membership, we announced at the New Orleans meeting that for any Brother suspended for nonpayment of dues prior to January 1, 2009, reinstatement can be completed upon paying the current (2010) dues only. All past dues are forgiven as well as per capita to the Supreme Council. This special accommodation will end on December 31, 2010.

With respect to the restoration of lapsed members, a brief review might be helpful. Here are some of the most common scenarios or questions that we see. I hope this helps:

Scenario 1: A Blue Lodge Mason is suspended from his Blue Lodge for non-payment of dues. What do we do? Suspension of a member in his Blue Lodge for NPD carries with it suspension in all Bodies of the Rite. If the member reinstates his Blue Lodge membership *within two years*, restoration in the Rite is automatic – no action is required. If the member waits more than two years to restore his Blue Lodge membership, then he must submit a petition to the Scottish Rite and be elected by majority of members present at a Stated Meeting. All of this is in Article XVII, Section 25 of our Statutes.

Scenario 2: You are notified by the Grand Lodge that a member has had disciplinary action initiated against him in the form of some type of Masonic charges. What do you do? Assuming that he has not been suspended for any other reason during the pending legal process, do nothing until the matter has been resolved in the Lodge. If the member in due time is suspended or expelled, the same penalty automatically applies in the Scottish Rite. If an individual is able to get his membership restored in the Blue Lodge, he can restore his membership in the Scottish Rite only by petition and election by a majority vote of the members present at a stated meeting. It's there in Article XVII, Section 25.

Scenario 3: A member is current in Blue Lodge but has not paid his Scottish Rite dues *for two years*: He shall be reported as suspended, NPD. There are two exceptions: (a) the two year time can be extended another 12 months by a majority vote of the members at a Stated Meeting; or (b) the SGIG/Deputy can fix the time for the suspension of members from two years down to one year. (Comment: Thus the "default" time of two years can be increased by another year upon vote of the Valley or reduced by one year on the action of the SGIG/Deputy). Article XVII, Section 26.

Scenario 4: A member has been suspended NPD. How is he restored? If an individual seeks restoration *within two years of his suspension*, he pays the balance due at the time of his suspension together with the current years' dues and his restoration is automatic. If an individual seeks restoration *two or more years after his suspension*, he must make written application accompanied by payment of the amount due at the time of his suspension *plus* the current year then due. A favorable committee report is received plus a majority vote at a Stated Meeting. For example, suppose a member is suspended in 1995 for a two years dues balance and seeks restoration in 2010. He pays what is past due at the time of his suspension, 1994 and 1995 and the dues for 2010. He skips the amounts due for 1996-2009. Note an exception: the Body may by

A Membership Primer  
August 5, 2010  
Page 4

favorable majority vote AND consent of the SGIG/Deputy remit all or part of his past dues. Article XVII, Section 26. This is modified only by the Brother to Brother initiative described above.

Scenario 5: Are there any exceptions or modifications to the above practices by the Supreme Council? Can my Orient or Valley establish its own rules or procedures? The Statutes of the Supreme Council govern the operation of the Scottish Rite in the Southern Jurisdiction, U.S.A.

Thank you for taking the time to review and consider this communication. Thank you in advance for what you will do in response. This is an issue that begs our attention and devotion and also because it's the right thing to do.

Tammy Fannin of Supreme Council's Computer Services Department (202.777.3112, [tfannin@scottishrite.org](mailto:tfannin@scottishrite.org)) and Dean Alban of our Membership Services Department (202.777.3109, [dalban@scottishrite.org](mailto:dalban@scottishrite.org)) are here to help and answer any questions or concerns. As always, I am also available to you should you wish to contact me (202.777.3135, [rseale@scottishrite.org](mailto:rseale@scottishrite.org)).

RAS:fj

Enclosure



M E M O R A N D U M  
C. FRED  
KLEINKNECHT 33°

June 26, 2002



TO: Active Members, Deputies, Personal Representatives  
and Secretaries

FROM: C. Fred Kleinknecht

  
Sovereign Grand Commander



RE: Electronic Petitions

Many Valleys are successfully using the Internet to advertise themselves and to acquire petitions for Reunions. The Supreme Council applauds and encourages this innovative use of technology. The following procedures shall be followed when a petition is submitted electronically:

1733  
SIXTEENTH  
STREET NW  
WASHINGTON  
DC 20009-3103

(1) The Active Member or Deputy for each Orient shall designate a Brother or Brothers who are authorized to be "First Line Signers" of electronically submitted petitions. (Approved signers could include the Personal Representative, Secretary, and Venerable Master).

(2) The First Line Signer of an electronic petition shall certify, orally and/or in writing, that he:

(a) Has spoken to the petitioner in person or on the telephone

(b) Has personally confirmed that the petitioner's Grand Lodge is recognized by the Orient's Grand Lodge

(c) Has personally confirmed that the petitioner is a member in good standing in a recognized Blue Lodge.

ANCIENT AND  
ACCEPTED SCOTTISH  
RITE OF FREEMASONRY  
SOUTHERN JURISDICTION  
UNITED STATES  
OF AMERICA

CFK:ca

C. FRED KLEINKNECHT, 33°  
Sovereign Grand Commander

# MEMORANDUM *from the Grand Commander...*

THE SUPREME COUNCIL 33°

ANCIENT & ACCEPTED SCOTTISH RITE OF FREEMASONRY  
SOUTHERN JURISDICTION UNITED STATES OF AMERICA

1733 SIXTEENTH STREET, N.W.  
WASHINGTON, D.C. 20009

December 27, 1990

TO:       ACTIVES AND DEPUTIES  
FROM:     C. Fred Kleinknecht  
RE:       25 Year Membership Certificates

I am pleased to announce that we will have 25 Year Membership Certificates available for order after January 1. These can be provided in quantity to your Secretaries at no cost other than shipping expense. I believe this certificate helps fill the need to acknowledge our long term members. It would be well to present this recognition during a regular, or special, meeting at the Temple.

All best wishes for 1991.

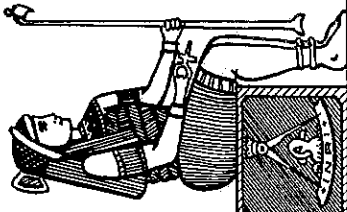
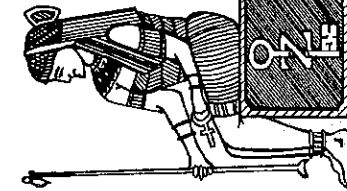
  
Sovereign Grand Commander 

SAMPLE - LASER PRINTED

A



IN DEO FIDUCIA NOSTRA



From the Grand Orient at Charleston in the State of South Carolina  
 SUPREME COUNCIL, MOTHER COUNCIL OF THE WORLD,  
 OF THE INSPECTORS GENERAL, KNIGHTS COMMANDERS OF THE HOUSE OF THE TEMPLE OF SOLOMON,  
 XXXIII DEGREE OF THE ANCIENT AND ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE  
 SOUTHERN JURISDICTION OF THE UNITED STATES.

Know ye, that  
 into all Freemasons of the said Rite throughout the World

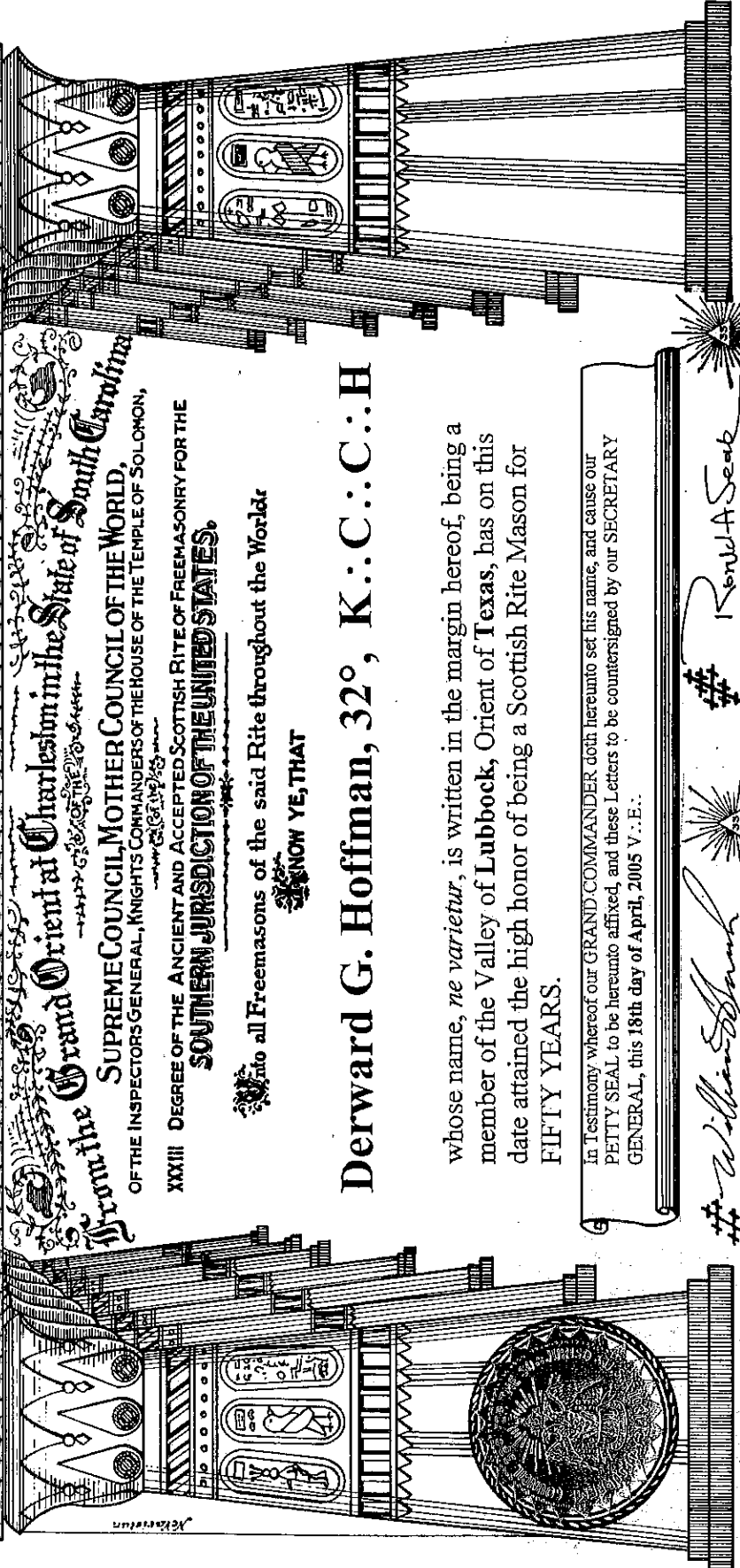
Derward G. Hoffman, 32°, K.:C.:C.:H

whose name, *re varietur*, is written in the margin hereof, being a member of the Valley of Lubbock, Orient of Texas, has on this date attained the high honor of being a Scottish Rite Mason for FIFTY YEARS.

In Testimony whereof our GRAND COMMANDER doth herunto set his name, and cause our PETTY SEAL to be hereunto affixed, and these Letters to be countersigned by our SECRETARY GENERAL, this 18th day of April, 2005 V.:E.:E.:

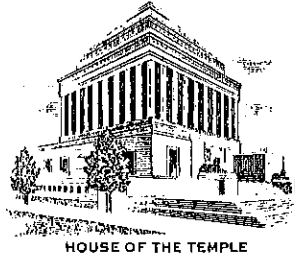
*William S. ...*  
 GRAND SECRETARY GENERAL

*Ronald A. Seab*  
 SOVEREIGN GRAND COMMANDER



*The Supreme Council*  
MOTHER COUNCIL OF THE WORLD  
OF THE  
THIRTY-THIRD AND LAST DEGREE

WILLIAM G. SIZEMORE, 33°  
REAR ADMIRAL, USN (RET.)  
GRAND EXECUTIVE DIRECTOR



1733 SIXTEENTH STREET, N. W.  
WASHINGTON, D. C. 20009-3199  
TELEPHONE 202-232-3579  
CABLE SCSJUSA  
FAX 202-387-1843

ANCIENT AND ACCEPTED SCOTTISH RITE OF  
FREEMASONRY, SOUTHERN JURISDICTION, U. S. A.

October 29, 1992

TO: Valley Secretaries

FROM: William G. Sizemore

† *Wm. Sizemore*

33°, G.C.

Grand Executive Director

RE: Twenty-five Year Certificates

A number of Valleys want to use their computer and laser printer to prepare the 25-year certificates for their eligible members. For that reason we have reprinted the certificate in a standard 8½" by 11" size. In addition, we can now supply partially printed 25-year certificates so that a Valley with a laser printer can use fonts of its choice to print the member's name, the paragraph below the name, and the information inside the bottom scroll, thereby assuring uniform spacing and alignment of the variable information on the certificate.

Enclosed is a sample of the "laser printer style" certificate (SAMPLE B) and one that we have laser printed using Boldface 12pt Dbl-wide font for the name, Courier 10cpi font for the paragraph following, and Courier 12cpi font for the type inside the scroll (see SAMPLE A).

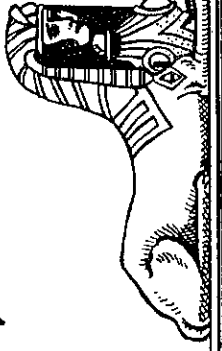
If you would like to use the partially printed 25-year certificates in the future, please specify "laser printer style" when placing your order.

For Valleys that use a typewriter to complete the certificates, SAMPLE C, the original "fully printed style" (except for the variable information), is still available.

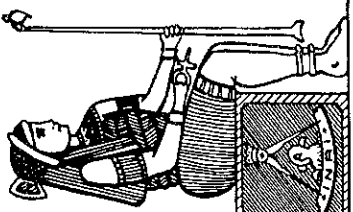
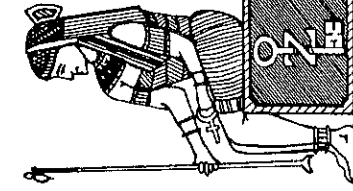
WGS/mb  
Enclosures

SAMPLE - "LASER-PRINTED STYLE"

B



IN DEO FIDUCIA NOSTRA



From the Grand Orient at Charleston in the State of South Carolina  
OF THE INSPECTORS GENERAL, KNIGHTS COMMANDERS OF THE HOUSE OF THE TEMPLE OF SOLOMON,

SUPREME COUNCIL, MOTHER COUNCIL OF THE WORLD,  
SOUTHERN JURISDICTION OF THE UNITED STATES.

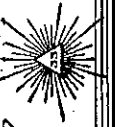
XXXIII DEGREE OF THE ANCIENT AND ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE

Into all Freemasons of the said Rite throughout the World:

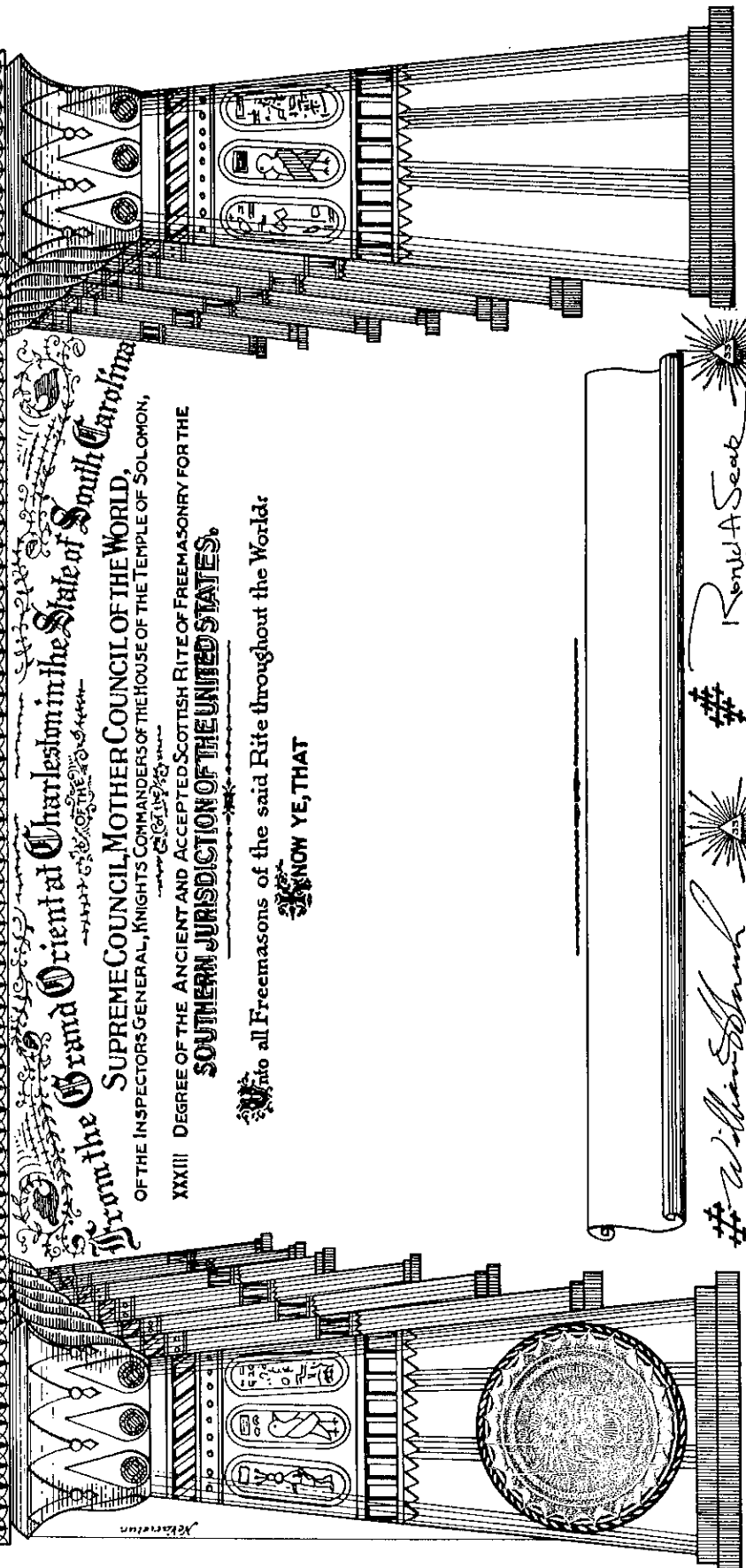
KNOW YE, THAT



William S. Lamb  
GRAND SECRETARY GENERAL

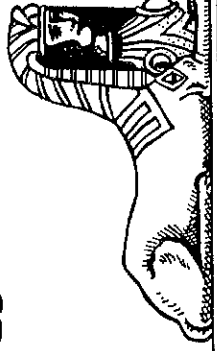


Ronald A. Seab  
SOVEREIGN GRAND COMMANDER

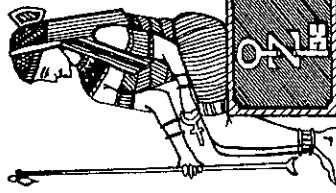
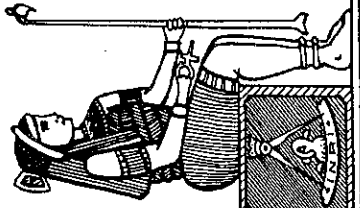


*SAMPLE - "FULLY PRINTED STYLE"*

*C*



**IN DEO FIDUCIA NOSTRA**



*From the* **Grand Orient at Charleston in the State of South Carolina**  
**SUPREME COUNCIL, MOTHER COUNCIL OF THE WORLD,**  
OF THE INSPECTORS GENERAL, KNIGHTS COMMANDERS OF THE TEMPLE OF SOLOMON,  
 XXXIII DEGREE OF THE ANCIENT AND ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE  
**SOUTHERN JURISDICTION OF THE UNITED STATES.**

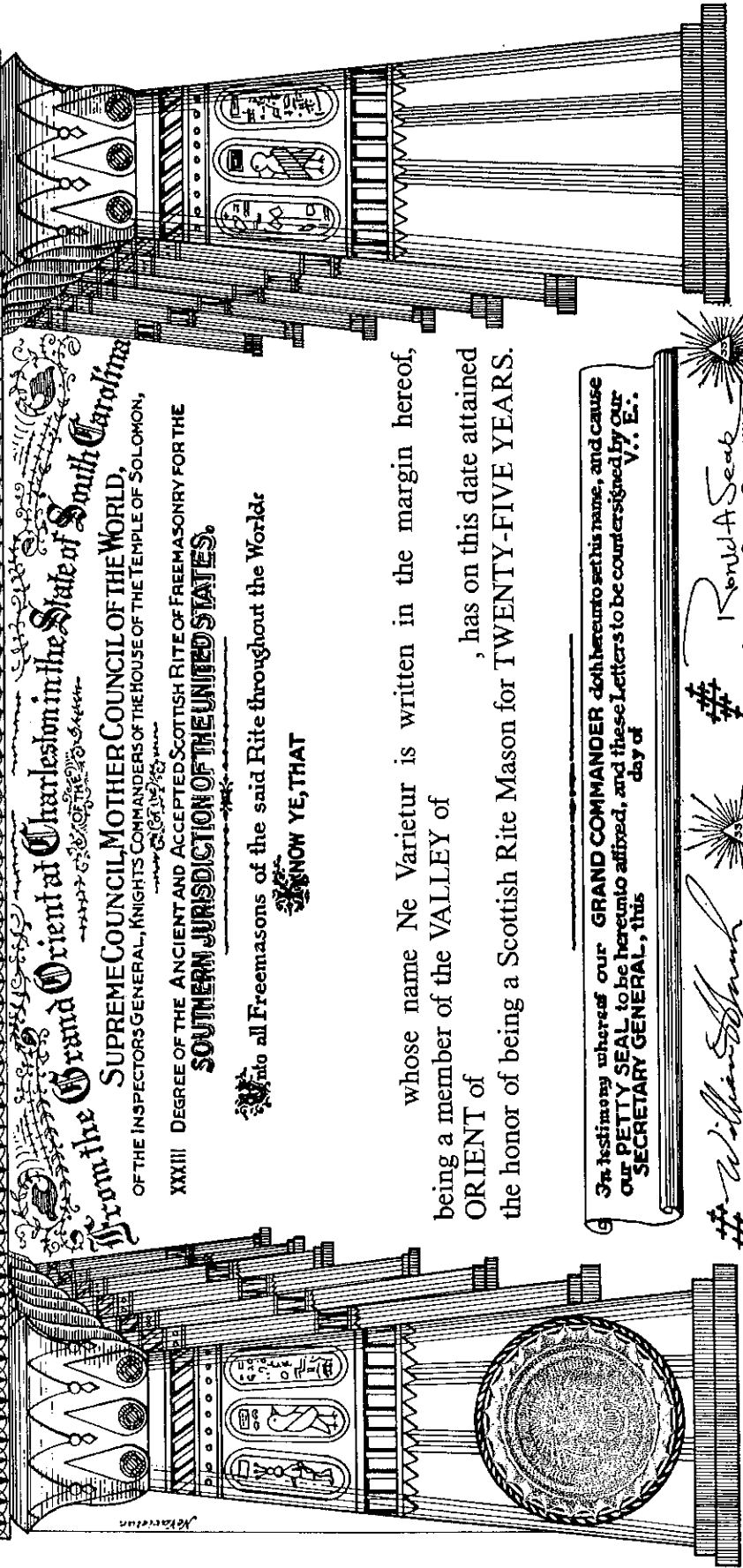
**Know YE, THAT**  
 unto all Freemasons of the said Rite throughout the World

whose name Ne Varietur is written in the margin hereof,  
 being a member of the VALLEY of  
 ORIENT of  
 the honor of being a Scottish Rite Mason for TWENTY-FIVE YEARS.

In testimony whereof our **GRAND COMMANDER** doth hereto set his name, and cause  
 our **PETTY SEAL** to be hereto affixed, and these Letters to be countersigned by our  
**SECRETARY GENERAL**, this  
 day of

*William S. Smith*  
 GRAND SECRETARY GENERAL

*Ronald A. Seab*  
 SOVEREIGN GRAND COMMANDER



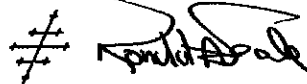
The Supreme Council, 33°  
1733 Sixteenth Street, NW  
Washington, DC 20009-3103

Telephone: 202-232-3579  
Facsimile: 202-464-0487  
grandcmdr@srmason-sj.org

October 20, 2004

TO: Actives, Deputies, Personal Representatives, and Secretaries

FROM: Ronald A. Seale



SOVEREIGN GRAND COMMANDER

RE: 50-Year Membership Awards

Now that our Valleys can use the Sentinel System to access and update their members' records, they can easily produce a list of their potential 50-year members, based on the 14° initiation dates. [Valleys should refer to the *Sentinel User's Manual* for instructions.] In addition, they can view an image of the Supreme Council's original record card of each member to verify whether the Brother had any lengthy breaks in service. With this information the Valley can now make its own determination regarding the eligibility of its potential 50-year members. The *Statutes* state that a Brother in good standing "who became a member...fifty or more calendar years prior to the current year is entitled to recognition as such." The Valley has the option of waiving any breaks in service, if they occurred, per action of the Supreme Council in 1995. Certainly we want to encourage those members who are active in the Fraternity in every way possible, and recognizing the 50<sup>th</sup> anniversary of their initiation is one way to do that. The verified list may be emailed to the Supreme Council for processing.

Accordingly, effective immediately, the Supreme Council will accept that all of the members submitted by the Valley for the 50-year award have been deemed eligible by the Valley and shall process the 50-Year Certificates and mail them, along with the lapel pins, to the Valley for presentation to the awardees.

**PAMPHLETS AVAILABLE**

The pamphlets listed below are available at no cost other than the shipping charge to Secretaries of Valleys in the Southern Jurisdiction for membership expansion and educational activities:

*A Circle from Childhood to Childhood (Scottish Rite Foundation Guidelines to Planned Giving)*

*Freemasonry and Religion*

*Freemasonry - What Is It?*

*H.E.L.P. - Help Eliminate Language & Learning Problems in Children*

*Masonry Beyond the Third Degree*

*Only Through Masonic Unity Do the Best Get Better*

*Rite Care: Scottish Rite Masons Helping Children Communicate*

*Supreme Council Guidelines for Dynamic and Successful Membership Maintenance and Expansion*

*The House of the Temple Historic Preservation Foundation*

*The Intendant of the Building Society: Laying A Cornerstone To Build On*

*The Scottish Rite Foundation Pooled Income Fund*

*The Scottish Rite Foundation RiteCare Scholarships Disaster Relief*

*Thoughts about America*

*To a Non-Mason: You must Seek Masonic Membership (Clausen)*

*Your Decision to Leave—or Not To Leave—the Scottish Rite*



**THE SUPREME COUNCIL, 33°**  
**1733 Sixteenth Street, NW**  
**Washington, DC 20009-3103**

**FAX number: 202-464-0487**  
**Phone number: 202-232-3579**  
**E-mail: council@scottishrite.org**

September 16, 2010

TO: All Secretaries

FROM: William G. Sizemore

RE: *A Bridge to Light*



Dear Brother Secretary:

As we move forward with the new printing of *A Bridge to Light*, it is necessary to change the ordering procedure. Instead of the Supreme Council sending the books to the Valleys without cost, they will be invoiced \$5 per book or \$100 per box (20 books per box). In turn, Valleys will no longer need to submit their inventory balances to us or send payments for sold or unaccounted for books. It will now be the Valley's decision whether the books to new candidates are free of charge or at cost. Books may be sold also to other members wishing to purchase an additional copy. For those wishing to purchase *A Bridge to Light* through the online store, it will retail for \$25 per book.

As before, please place your *A Bridge to Light* orders with Dana Osterndorf (dosterndorf@scottishrite.org or 202-777-3184). Due to the above change, Valleys having already requested books should confirm their orders with Dana. Valleys should also continue distributing any held 2006 editions prior to ordering additional copies as only minor updates were made to the new printing. Earlier editions may be disposed of.

Thank you for all you do for the Scottish Rite.

WGS/dso

**THE SUPREME COUNCIL, 33°**  
**1733 Sixteenth Street, NW**  
**Washington, DC 20009-3103**

FAX number: 202-464-0487  
Phone number: 202-232-3579  
E-mail: [council@scottishrite.org](mailto:council@scottishrite.org)

September 1, 2011

TO: All Actives, Deputies, Personal Representatives, and Secretaries

   G.:C.:

FROM: William G. Sizemore

GRAND EXECUTIVE DIRECTOR

RE: *Albert Pike's Morals & Dogma: Annotated Edition*

Our new publication, *Albert Pike's Morals & Dogma: Annotated Edition*, was introduced and made available for sale at the recent Biennial Session. During the Session, the Supreme Council agreed that Valleys would provide a copy of this book to each new Scottish Rite member, commencing with the 2011 Fall Reunions. To meet this requirement, we are prepared to handle Valley orders for the book which will be shipped in boxes of 6 books each. At the greatly discounted cost of \$25 per book, each box of 6 will cost the Valley \$150 plus shipping costs.

Please note this price is *only* for Valley orders for new members; all orders for current members must be purchased from our on-line store. This is an "honor" procedure and assumes Valley Secretaries will maintain an accurate accounting of the books. Valleys that order and receive more books than the number of new members can expect to be billed later at the normal retail price of \$75 each for the extra books. Direct all Valley orders to James Hodgkins, Assistant to the Grand Archivist and Grand Historian, at [jhodgkins@scottishrite.org](mailto:jhodgkins@scottishrite.org).

WGS:jh

**DOWNLOAD REQUEST FORM**  
(Complete Request form and return to the Supreme Council)

VALLEY  or ORIENT

INCLUDE IN THIS ORDER: (Check the one/s you want included)

- \*  Members and X1s (X1 is the member type of a complimentary recipient on the Valley's mailing rolls who is not a member of the Valley)
- \*  Members Only, No X1s (complimentaries)
- T-Hold Members (T-Hold members are those for whom we do not currently have a good address and whose *Scottish Rite Journal* has been returned)

OR, if this request is for Sojourner labels only, then, after entering Valley cipher or Orient number above, check the Sojourners Only box below. (All orders for Sojourners must indicate the approval of the SGIG or Deputy of the Orient.)

Sojourners Only (Sojourners are Scottish Rite members who live in the territorial jurisdiction of the Valley but belong to another Valley, or Scottish Rite members who live in the state but belong to Bodies in another Orient).

For Sojourners Only, check one of the following:

- Living in the state but not members of this Valley
- Living in the state but not members of Valleys in this Orient
- \*  Living in just the zip-code areas specified below:

\* If the request is for just certain zip-code areas, you must list the zip codes (in numerical order) from which the addresses are to be selected: \_\_\_\_\_

FILE Will Be in Zip Code Sort

FILE TYPE: (Select Only One)

- ASCII Comma-delimited  ASCII Tab-delimited  ASCII Pipe-delimited
- MS EXCEL File  MS WORD Merge-data File

E-mail Address \_\_\_\_\_

DISK (All downloads that cannot be emailed will be supplied on DOS formatted 3½" disk)

Name \_\_\_\_\_

Date \_\_\_\_\_

**REQUEST FOR SOJOURNER LABELS OR ROSTER**  
(Complete Request form and return to the Supreme Council)

VALLEY \_\_\_\_\_ or ORIENT \_\_\_\_\_

Sojourners are Scottish Rite members who live in the zip-code ranges of the Valley's jurisdiction but belong to another Valley, or who live in the state but belong to Bodies in another Orient).

Indicate, by checking **one** of the following, the Sojourners you want:

- \_\_\_ Living in the state but not members of this Valley
- \_\_\_ Living in the state but not members of Valleys in this Orient
- \* \_\_\_ Living in just the zip-code areas specified below, but not members of this Valley
- \* \_\_\_ Living in just the zip-code areas specified below, but not members of Valleys in this Orient.

\* If the request is for Sojourners living in just certain zip-code areas, you must list the zip codes or zip-code ranges (**in numerical order**) from which the Sojourners are to be selected: \_\_\_\_\_

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(Continue on reverse side, if necessary)

Check one of the following:

\_\_\_ Pressure sensitive labels (3 names and addresses across) = \$10 set-up plus 2¢ per name.

\_\_\_ Roster (8½" x 11" paper, one line per record) = \$10 set-up plus \$6.05 per 1,000 names (duplicate, no charge) If corresponding pressure-sensitive labels are ordered along with the roster, the \$10 set-up charge on the labels is waived.

\_\_\_ Downloaded file = \$25.00. Select one type of file format:  
\_\_\_ ASCII, comma-delimited; \_\_\_ ASCII, tab-delimited; \_\_\_ ASCII, pipe-delimited;  
\_\_\_ MS EXCEL; \_\_\_ MS WORD Data  
(Supply E-mail address \_\_\_\_\_ **or**  
file will be supplied on 3½" disk or CD (add a \$2.00 shipping & handling charge).

Name \_\_\_\_\_ Date \_\_\_\_\_

Title \_\_\_\_\_ Valley \_\_\_\_\_





**YEAR 2010 LABEL & ROSTER ORDER SCHEDULE**

Deadline for Orders to be Received	Orders To Be Received by Valley	PAPER LABELS PEEL & STICK		LABEL/FILE DOWNLOADS	FILE TYPES (SELECT ONE)							ONE-LINE ROSTERS					
		Zip Code Sort	Alpha Order by Name		ENTER "D" for Download	SORT: Z=Zip A=ABC ID=ID#	ASCII Comma Delimited	ASCII Tab Delimited	ASCII Pipe Delimited	MS EX-CEL File	MS WORD File	Mem-bers Only NO Xls	ABC Sort by Name	ID Number Sort	Zip Code Sort	Mem-bers Only NO Xls	
<u>JANUARY</u> Jan 2	2010 Jan. 8																
Jan. 12	Jan. 26																
<u>FEBRUARY</u> Jan. 26	Feb. 9																
Feb. 9	Feb. 23																
<u>MARCH</u> Feb. 20	Mar. 6																
Mar. 6	Mar. 20																
<u>APRIL</u> Mar. 23	Apr. 6																
Apr. 6	Apr. 20																
<u>MAY</u> Apr. 17	May 1																
May 1	May 15																
<u>JUNE</u> May 15	June 2																
May 29	June 16																

WHEN ORDERING LABELS ON PAPER, PLACE A NUMBER IN THE APPROPRIATE BOX: "1" FOR A SINGLE COPY; "2" IF YOU WANT YOUR ORDER IN DUPLICATE; "3" IF YOU WANT YOUR ORDER IN TRIPLICATE, ETC. TO ORDER A LABEL DOWNLOAD, ENTER "D" IN THE COLUMN UNDER THAT HEADING, SELECT A SORT, AND A FILE TYPE.

LABEL ORDERS WILL INCLUDE YOUR Xls (COMPLIMENTARY NON-MEMBERS) UNLESS YOU CHECK THE "MEMBERS ONLY" BOX FOLLOWING THE LABELS, AND ROSTER ORDERS WILL INCLUDE YOUR Xls UNLESS YOU CHECK THE "MEMBERS ONLY" BOX FOLLOWING THE ROSTERS.

Date \_\_\_\_\_ Valley \_\_\_\_\_ Orient \_\_\_\_\_  
 \_\_\_\_\_ Valley Cipher \_\_\_\_\_ Secretary \_\_\_\_\_

**NOTE:** Label downloads will be emailed to Valleys that have an email address.

**YEAR 2010 LABEL & ROSTER ORDER SCHEDULE**

Deadline for Orders to be Received	Orders To Be Received by Valley	PAPER LABELS PEEL & STICK		LABEL/FILE DOWNLOADS		FILE TYPES (SELECT ONE)						ONE-LINE ROSTERS			
		Zip Code Sort	Alpha Order by Name	ENTER "D" for Download	SORT: Z=Zip A=ABC ID=ID#	ASCII Comma Delimited	ASCII Tab Delimited	ASCII Pipe Delimited	MS EX-CEL File	MS WORD File	Members Only NO Xls	ABC Sort by Name	ID Number Sort	Zip Code Sort	Members Only NO Xls
<u>JUNE-JULY</u> June 12	June 26														
June 26	July 14														
<u>JULY-AUG.</u> July 10	July 24														
July 24	Aug. 10														
<u>AUG.-SEPT</u> Aug. 14	Aug. 28														
Aug. 28	Sept 15														
<u>SEPT-OCT.</u> Sept. 11	Sept 25														
Sept. 25	Oct. 9														
<u>OCT.-NOV.</u> Oct. 9	Oct. 23														
Oct. 23	Nov. 6														
<u>NOV.-DEC.</u> Nov. 6	Nov. 20														
Nov. 27	Dec. 11														

WHEN ORDERING LABELS ON PAPER, PLACE A NUMBER IN THE APPROPRIATE BOX: "1" FOR A SINGLE COPY; "2" IF YOU WANT YOUR ORDER IN DUPLICATE; "3" IF YOU WANT YOUR ORDER IN TRIPLICATE, ETC. TO ORDER A LABEL DOWNLOAD, ENTER "D" IN THE COLUMN UNDER THAT HEADING, SELECT A SORT, AND A FILE TYPE.

LABEL ORDERS WILL INCLUDE YOUR Xls (COMPLIMENTARY NON-MEMBERS) UNLESS YOU CHECK THE "MEMBERS ONLY" BOX FOLLOWING THE LABELS, AND ROSTER ORDERS WILL INCLUDE YOUR Xls UNLESS YOU CHECK THE "MEMBERS ONLY" BOX FOLLOWING THE ROSTERS.

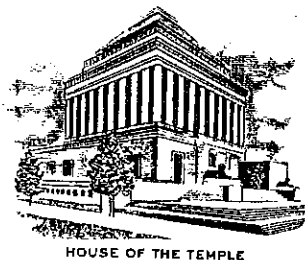
Date \_\_\_\_\_ Valley \_\_\_\_\_ Orient \_\_\_\_\_  
 Valley Cipher \_\_\_\_\_ Secretary \_\_\_\_\_

**NOTE:** Label downloads will be emailed to Valleys that have an email address.



The Supreme Council  
MOTHER COUNCIL OF THE WORLD  
OF THE  
THIRTY-THIRD AND LAST DEGREE

WILLIAM G. SIZEMORE, 33°  
REAR ADMIRAL, USN (RET.)  
GRAND EXECUTIVE DIRECTOR



HOUSE OF THE TEMPLE

1733 SIXTEENTH STREET, N. W.  
WASHINGTON, D. C. 20009-3199  
TELEPHONE 1-202-232-3579  
FAX 1-202-387-1843

ANCIENT AND ACCEPTED SCOTTISH RITE OF  
FREEMASONRY, SOUTHERN JURISDICTION, U. S. A.

November 5, 1997

TO: Active Members, Deputies, Personal  
Representatives, and Secretaries

FROM: William G. Sizemore



*Gene Sizemore*



G.:C.:

RE: New Youth Program

Grand Executive Director

I am pleased to announce a new Scottish Rite, Southern Jurisdiction, Youth Program. This initiative, approved by The Supreme Council, will recognize high school youth enrolled in the Junior Reserve Officers Training Corps, (JROTC), with an award for their scholastic excellence and demonstrated ideals of Americanism. The award consists of a medal and a ribbon to be worn on the JROTC uniform, and a certificate suitable for framing. The medal depicts the heraldic logo of the Scottish Rite of Freemasonry, and by the words "JROTC Education and Americanism" calls attention to the two major focal points of the Scottish Rite.

Attached is a copy of the Assistant Secretary of Defense approval of the program, together with information relative to the eligibility for, selection of, and presentation to individual cadets. Also, attached is a depiction of the medal, ribbon, and certificate. These are available from the Grand Executive Director's office as a package for a total price of \$5.00, postage paid.

The Department of Defense has acted quickly in announcing this new opportunity to recognize America's outstanding youth. Already, we have received inquiries from the Headquarters of the individual Services' JROTC Program offices indicating knowledge of the program and an interest in quickly incorporating information about it into their publications.

You are encouraged to adopt this opportunity for recognition of special youth in those JROTC high schools located in your Valleys. The long term benefits of positive publicity, community service, and youth recognition are obvious. The price of the package of medal, ribbon, and certificate has been kept low to encourage your participation in this new Americanism program.



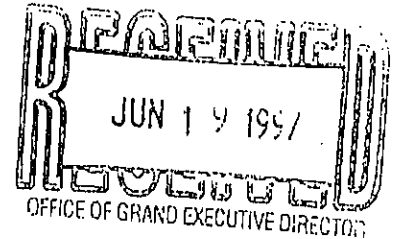
FORCE MANAGEMENT  
POLICY

ASSISTANT SECRETARY OF DEFENSE  
4000 DEFENSE PENTAGON  
WASHINGTON, D.C. 20301-4000



JUN 17 1997

Rear Admiral William G. Sizemore, USN (Ret.)  
Grand Executive Director  
Ancient and Accepted Scottish Rite of Freemasonry  
Southern Jurisdiction, U. S. A.  
1733 Sixteenth Street, North West  
Washington, DC 20009-3199



Dear Admiral Sizemore:

Thank you for your May 21, 1997 letter announcing establishment of an award to outstanding cadets enrolled in the Junior Reserve Officers Training Corps (Junior ROTC) program. We appreciate and welcome your efforts to recognize secondary school students participating in this important citizenship program, and believe that support from prominent civic organizations remains a key to the program's success. You may be interested to know that the recently-completed expansion of the Junior ROTC program now permits participation by more than 360,000 students nationwide and in certain overseas locations.

Notification letters soon will be sent to the Military Services announcing establishment of the award, and requesting that the Scottish Rite of Freemasonry be included in the list of organizations eligible to recognize Junior ROTC cadets. We are most grateful for your generous support of the Junior ROTC program. My point of contact, Major Tom Iskrzak, (703) 697-9273, is available to assist with any questions you may have.

Sincerely,

  
F. Pang







# GUIDELINES FOR SCOTTISH RITE OF FREEMASONRY JROTC AWARD (For High Schools)

**General:** Through scholarship grants, Rite Care® Childhood Language Disorders Clinics, and patriotic programs, the Scottish Rite has sustained a positive presence throughout our country for over two centuries. Its 500,000 membership captures a very broad set of cultural and economic backgrounds.

**Description:** Approved by the Assistant Secretary of Defense, the award consists of a medal, ribbon, and certificate. The medal depicts the heraldic logo of the Scottish Rite of Freemasonry, and by the words "JROTC Education and Americanism" calls attention to two of the major focal points of the Scottish Rite.

**Purpose:** This award recognizes one outstanding cadet in the second year or second to last year of their commitment to a unit. The award cannot be bestowed on a cadet in his/her first or last year of the program. To assist in preparation, a sample copy of the completed certificate is included in the award package.

## Eligibility:

-  Have contributed the most among cadets on campus to encourage and demonstrate Americanism by deeds or conduct during participation in extracurricular activities or community projects
-  Have demonstrated academic excellence by being in the top 25% of his/her academic class
-  Have demonstrated outstanding leadership by exhibiting qualities of dependability, good character, self discipline, good citizenship and patriotism
-  Have not previously received this award

**Selection:** The DAI/SAI or other senior service official or the head of the school (or both) will make the selection.

**Administration:** The Supreme Council is divided between two Jurisdictions, the Southern Jurisdiction and Northern Masonic Jurisdiction. (For a map, click on website: [www.scottishrite.org](http://www.scottishrite.org), then "Where We Are" at bottom of the page, and "Location of Scottish Rite Valleys").

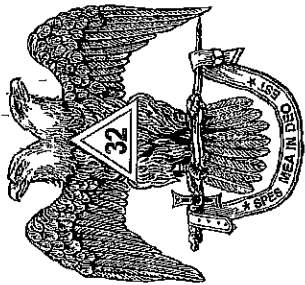
- Southern Jurisdiction: Requests for the award should be sent to the nearest Scottish Rite Valley of the Southern Jurisdiction. (For locations, refer to the map described above and click on the desired state) or to the National Headquarters, William G. Sizemore, Grand Executive Director, telephone: 202-232-3579, or email: [wsizemore@scottishrite.org](mailto:wsizemore@scottishrite.org).
- Northern Masonic Jurisdiction: Refer to: [www.supremecouncil.org](http://www.supremecouncil.org), click on ROTC Program. (For locations within the Northern Masonic Jurisdiction, please see map referred to above). Inquiries should be directed to William Holland, Director of Operations, Telephone: 800-814-1432, Ext. 3133, or email: [wholland@supremecouncil.org](mailto:wholland@supremecouncil.org).

**Presentation and Publicity:** With 30 days prior notice of the presentation ceremony, whenever possible the Scottish Rite Valley which provided the award will select and provide a presenter.

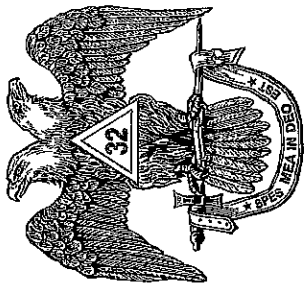


JUNIOR ROTC (JROTC) Award Medal and Purple Ribbon  
Presented by the Scottish Rite to  
Students OF THE JUNIOR ROTC (JROTC) Program





ANCIENT AND ACCEPTED  
SCOTTISH RITE OF FREEMASONRY  
SOUTHERN JURISDICTION, U.S.A.



PRESENTS THIS CERTIFICATE TO

of

*In recognition of scholastic excellence  
and demonstrated Americanism in supporting  
the United States as a member of the*

**JUNIOR RESERVE OFFICERS TRAINING CORPS**

Date

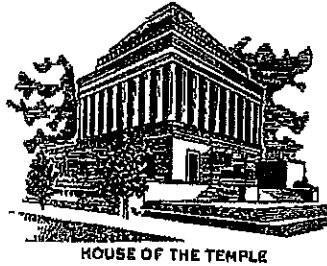
Sponsoring Valley

Officer

Secretary

*The Supreme Council*  
MOTHER COUNCIL OF THE WORLD  
OF THE  
THIRTY THIRD AND LAST DEGREE

WILLIAM G. SIZEMORE, 33°, G.C.C.  
REAR ADMIRAL, USN (RET)  
GRAND EXECUTIVE DIRECTOR



1733 SIXTEENTH STREET, NW  
WASHINGTON, DC 20009-3103  
TELEPHONE 202-232-3579  
FAX 202-387-1843

ANCIENT AND ACCEPTED SCOTTISH RITE OF  
FREEMASONRY, SOUTHERN JURISDICTION, U. S. A.

December 2, 2002

TO: Active Members, Deputies, Personal  
Representatives, and Secretaries

FROM: William G. Sizemore



*Gene*



G.C.C.

Grand Executive Director

RE: An Additional Youth Recognition Program

I am pleased to announce an additional Scottish Rite, Southern Jurisdiction, Youth Program. This initiative, approved by the office of the Assistant Secretary of Defense, will recognize college youth enrolled in the Reserve Officers Training Corps (ROTC) with an award for their scholastic excellence and demonstrated ideals of Americanism. The award consists of a medal and a ribbon to be worn on the ROTC uniform, and a certificate suitable for framing. The medal depicts the heraldic logo of the Scottish Rite of Freemasonry, and by the words "ROTC Education and Americanism" calls attention to the two major focal points of the Scottish Rite.

Attached is a copy of the Assistant Secretary of Defense approval of the program, together with information relative to the eligibility for, selection of, and presentation to individual cadets. Also, attached is a depiction of the medal, ribbon, and certificate. These are available from the Grand Executive Director's office as a package for a total price of \$5.00, postage paid.

The Department of Defense has acted quickly in announcing this new opportunity to recognize America's outstanding youth. Already, we have received inquiries from the Headquarters of the Individual Services' ROTC Program offices indicating knowledge of the program and an interest in quickly incorporating information about it into their publications.

You are encouraged to adopt this opportunity for recognition of special youth in those ROTC schools located in your Valleys. The long term benefits of positive publicity, community service, and youth recognition are obvious. The price of the package of medal, ribbon, and certificate has been kept low to encourage your participation in this new Americanism program.

WGS:ca



ASSISTANT SECRETARY OF DEFENSE  
4000 DEFENSE PENTAGON  
WASHINGTON, DC 20301-4000

AUG 30 2002



FORCE MANAGEMENT  
POLICY

MEMORANDUM FOR ASSISTANT SECRETARY OF ARMY (MANPOWER AND  
RESERVE AFFAIRS)  
ASSISTANT SECRETARY OF NAVY (MANPOWER AND  
RESERVE AFFAIRS)  
ASSISTANT SECRETARY OF AIR FORCE (MANPOWER  
AND RESERVE AFFAIRS)

SUBJECT: Proposed Scottish Rite of Freemasonry Award for Reserve Officers Training  
Corps (ROTC) Programs

The Supreme Council of the Scottish Rite of Freemasonry has proposed criteria for a new award for ROTC programs. This award would recognize second and third year cadets with an academic standing in the top 25 percent of their class who encourage and demonstrate patriotism by deeds or conduct during participation in extracurricular activities or community projects. This award already exists for cadets in the Junior ROTC program. The details of the proposed criteria and precedence of this award are attached.

Awards for cadets in ROTC and JROTC programs, both those sponsored by the Services as well as those from outside organizations, are within the authority and purview of each Service. Consequently, I ask that each Service coordinate directly with the sponsor to establish this award.

Major Brenda Leong, (703) 695-5529, is available to answer questions.

*Charles S. Abell*  
for Charles S. Abell

Attachment:  
As stated

cc:  
Commanding General, U.S. Army ROTC Cadet Command  
Chief of Naval Education and Training  
Commander, Air Force Officer and Accession Training Schools









# GUIDELINES FOR SCOTTISH RITE OF FREEMASONRY ROTC AWARD (For Colleges/Universities)

**General:** The Scottish Rite of Freemasonry is a fraternal organization first established in Charleston, South Carolina, in 1801. Through scholarship grants, RiteCare Clinics helping children communicate, and patriotic programs, the Scottish Rite benefits communities across the nation in direct and dynamic ways every day of the year. Its 500,000 membership reflects the many professions of America.

**Description:** Approved by the Assistant Secretary of Defense, the award consists of a medal, a ribbon, and a certificate. The medal depicts the heraldic double-headed eagle logo of the Scottish Rite of Freemasonry, and by the words "ROTC Education and Americanism" calls attention to two of the major focal points of the Scottish Rite.

**Purpose:** This award recognizes one outstanding cadet in the second year or third year of a 4-year program.

## Eligibility-The cadet must:

-  Have contributed the most among cadets on campus to encourage and demonstrate patriotism by deeds or conduct during participation in extracurricular activities or community projects
-  Have demonstrated academic excellence by being in the top 25% of his/her academic class
-  Have demonstrated a potential for outstanding leadership by exhibiting qualities of dependability, good character, self discipline, good citizenship and patriotism
-  Have not previously received this award

**Selection:** The Professor of Military/Naval Science will make the selection.

**Administration:** The Supreme Council is divided between two Jurisdictions, the Southern Jurisdiction and Northern Masonic Jurisdiction. (For a map, click on website: [www.scottishrite.org](http://www.scottishrite.org), then "Where We Are" at bottom of the page, and "Location of Scottish Rite Valleys").

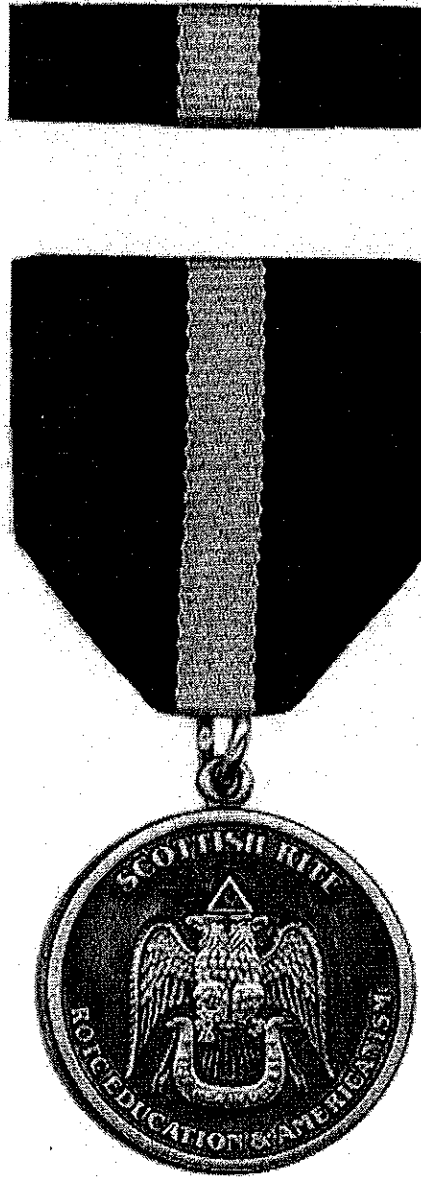
- Southern Jurisdiction: Requests for the award should be sent to the nearest Scottish Rite Valley of the Southern Jurisdiction. (For locations, refer to the map described above and click on the desired state) or to the National Headquarters, William G. Sizemore, Grand Executive Director, telephone: 202-232-3579, or email: [wsizemore@scottishrite.org](mailto:wsizemore@scottishrite.org).
- Northern Masonic Jurisdiction: Refer to: [www.supremecouncil.org](http://www.supremecouncil.org), click on ROTC Program. (For locations within the Northern Masonic Jurisdiction, please see map referred to above). Inquiries should be directed to William Holland, Director of Operations, Telephone: 800-814-1432, Ext. 3133, or email: [wholland@supremecouncil.org](mailto:wholland@supremecouncil.org).

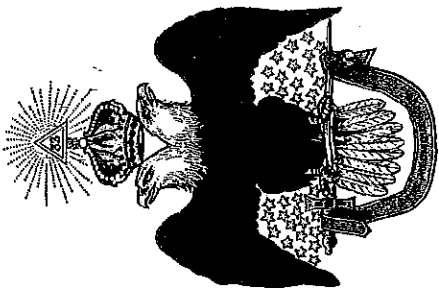
**Presentation and Publicity:** With 30 days prior notice of the presentation ceremony, whenever possible the Scottish Rite Valley which provided the award will select and provide a presenter.



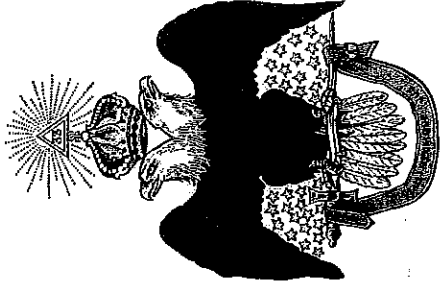


ROTC Award Medal and Purple Ribbon  
With Gold Stripe Down Center  
Presented by the Scottish Rite to  
Students Enrolled in ROTC at Colleges or Universities





**ANCIENT AND ACCEPTED  
SCOTTISH RITE OF FREEMASONRY  
SOUTHERN JURISDICTION, U.S.A.**

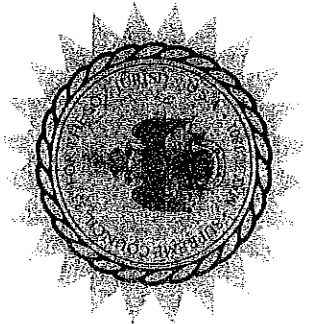


PRESENTS THIS CERTIFICATE TO

of

*In recognition of scholastic excellence  
and demonstrated Americanism in supporting  
the United States as a member of the*

**RESERVE OFFICERS TRAINING CORPS**



Date

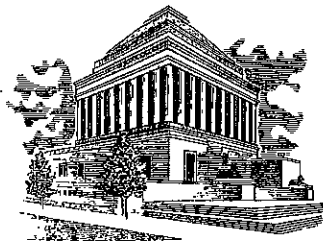
Sponsoring Valley

Officer

Secretary

Supreme Council  
OF THE  
THIRTY THIRD AND LAST DEGREE

WILLIAM G. SIZEMORE, 33°, G.:C.:  
REAR ADMIRAL, USN (RET.)  
GRAND EXECUTIVE DIRECTOR



HOUSE OF THE TEMPLE

1733 SIXTEENTH STREET, NW  
WASHINGTON, DC 20009-3103  
TELEPHONE 202-232-3579  
FAX 202-464-0487

ANCIENT AND ACCEPTED SCOTTISH RITE OF  
FREEMASONRY, SOUTHERN JURISDICTION, U. S. A.

November 19, 2007

To: All Secretaries, Supreme Council, 33°  
Southern Jurisdiction

From: William G. Sizemore

 *Gene Sizemore*  
Grand Executive Director



RE: Scottish Rite JROTC and ROTC Awards Programs

The Scottish Rite JROTC and ROTC Awards Programs, approved and endorsed by the Department of Defense, are successful Americanism and outreach programs for a majority of Orients and Valleys. Also, the Northern Masonic Jurisdiction actively participates with us in these initiatives. In an effort to increase our recognition of outstanding young Americans while expanding our outreach into local communities, we recently compiled a list of every high school, college, and university across the Southern Jurisdiction that has a JROTC or ROTC unit and identified their geographical locations relative to the Valleys of the Southern Jurisdiction.

We undertook this task so we could obtain a complete picture of our potential. Currently, we are participating with roughly 16% of all appropriate colleges and 30% of all appropriate high schools. Please contact Chris Mullaney, Special Assistant, for your copy of the schools with JROTC and ROTC units in your area. In the event the original information that established these programs for the Scottish Rite is missing from your files, this information is attached.

WGS:cm:ca

Enclosure



**RONALD A. SEALE, 33°**, SOVEREIGN GRAND COMMANDER  
A.: & A.: Scottish Rite of Freemasonry, Southern Jurisdiction, USA


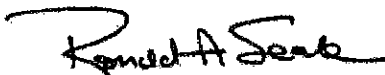

# Memo

The Supreme Council, 33°  
1733 Sixteenth Street, NW  
Washington, DC 20009-3103

Telephone: 202-232-3579  
Facsimile: 202-464-0487  
grandcmdr@srmason-sj.org

April 4, 2006

TO: Active Members and Deputies of the Supreme Council, and Secretaries

FROM: Ronald A. Seale     
SOVEREIGN GRAND COMMANDER

RE: Disposition of Valley Property

---

Dear Brethren,

Recently, one of our members informed us of a valuable purchase he made on eBay, the popular online auction site. For under \$100, he purchased an old Masonic photograph in its original frame. When he took the photo in for restoration, he was offered over \$5000 for the antique frame alone.

We are aware that some Valleys are disposing of property in order to raise needed funds and that they occasionally sell books, photographs, paintings and furniture. Although we are not opposed to this practice, the Supreme Council cautions that you may inadvertently undervalue your property. Before disposing of such things, please have them properly evaluated. For your assistance in this regard, you may want to speak with Ill.: Arturo de Hoyos, 33°, Grand Archivist and Grand Historian, here at the House of the Temple.

Other Valleys dispose of property simply because they cannot properly care for or no longer have a need for it. The House of the Temple always welcomes the opportunity to receive books for its library; Masonic regalia, jewels, watches and photographs for its museum; and rituals and manuscripts for its archives.

If you are considering divesting your Valley of property of this type, please let us know, so that we may at least have the first right of refusal.

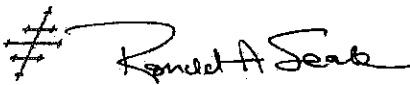

RAS:fj

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1733 Sixteenth Street, NW  
Washington, DC 20009-3103

Telephone: 202-232-3579  
Facsimile: 202-464-0487  
grandcmdr@srmason-sj.org

November 14, 2005

TO: Active Members and Deputies of the Supreme Council

FROM: Ronald A. Seale    
SOVEREIGN GRAND COMMANDER

RE: Financial Accounting of Scottish Rite Programs and Activities

---

Gentlemen;

The Scottish Rite is operating under a blanket group exemption issued on October 27, 1971 under section 501(c)(10) of the Internal Revenue Code. Benefiting from this blanket exemption, the Valleys function in much the same fashion as the Scottish Rite in regards to the various programs and activities. All programs, in order to be sanctioned, must be directed by the Valley with the related financial accounting of the program or activity included in the books and records of the Valley. In this regard all programs, including clubs, luncheon groups, etc, that are being conducted as Scottish Rite activities, especially those maintaining their own bank accounts, must be included in the financial activity of the respective Valley. Any activity not so recorded shall not be recognized as a Scottish Rite activity and reported as such.

RAS:fj

Investment Policies and Guidelines  
January, 2009

Monies and investments owned by Orients, Valleys and related entities, such as foundations, temple corporations, holding companies, etc. should be safeguarded and managed in a prudent manner. As part of the Strategic Plan of the Supreme Council, information is provided to Orients and Valleys in order to provide a framework for financial success. The purpose of this document is to outline general strategies for prudent financial management. It is neither the desire nor the intent of the Supreme Council to provide “investment advice” to the Orients and Valleys, but rather to provide a framework of ideas and concepts that can be utilized.

**General Strategies**

The following general strategies are suggested as a minimum guideline, to be applied to all funds held under the auspices of Scottish Rite in the Southern Jurisdiction:

1. Investment and/or Finance Committee - Appoint a committee of three (3) or more to provide advice and monitoring of the financial process. Larger Valleys or entities may segregate financial management oversight into two committees, so that a Finance Committee can oversee financial reporting, budgeting and normal fiscal operations, while a separate Investment Committee can focus strictly on investments.
  - a. The Committee charged with investment oversight should NOT have among its voting members any person who serves as an active investment manager for the funds being monitored. This will avoid any appearance of a conflict of interest. While an investment manager (broker, bank trust officer, etc. who is responsible for investment of ANY of the funds of the entity) may and should meet regularly with the Committee, he must not be a voting member of the Committee.
2. Audit - Utilize an audit or review by an outside Certified Public Accountant (CPA). In general, a review performed by a CPA is acceptable for entities with assets and annual revenues of less than \$100,000. The report of the CPA should be made available to the Scottish Rite membership for inspection.
3. Budget – An annual budget should be established for each entity and should be publicized to the membership.
4. Reporting – Regular financial reporting of the financial activity of each entity should be made to the membership at large. The level of detail may vary depending on the circumstances, but regular reporting is crucial. The reporting should be done at least quarterly. It is especially important to report, in a timely manner, results of any special fundraising efforts.
5. IRS Compliance – Every entity should establish safeguards to ensure that all IRS reporting and disclosure guidelines are followed. Every entity that has a taxpayer identification number is required to submit some form of annual report to the IRS.
6. Internal Controls – Every entity should regularly monitor their financial safeguards to ensure that adequate internal controls are in place. At a minimum, this means:
  - a. Segregation of duties- Avoid any situation where one person has control of all financial information or activities. Involve more than one person in all financial processes. For instance, the same person should not open the mail, deposit checks and manage dues records.

- b. Reconcile statements – Every bank statement and investment activity report should be reconciled to the accounting records. This reconciliation should be performed by a person who is not involved with the underlying financial transactions.
  - c. Training of back-up personnel - Make sure that every person involved in a financial transaction has at least one person trained to step into his place, should the need arise.
7. Investment Policy- Each entity should establish and monitor an investment policy, which should be tailored to the needs of the particular entity (Orient, Valley, Foundation, etc.) Attachment A is an example policy, which can be adopted for use by any Scottish Rite entity. Investment policies should not simply be copied from this example. It is important to realize that the investment needs, risks and expertise available will differ from Orient to Orient and from Valley to Valley. Each Valley is encouraged to make use of the expertise of their membership. Many members have strong financial backgrounds and utilizing their expertise may well generate a stronger motivation in these men to support our Rite.

In general, an adequate investment policy should include the following four major points:

- a. OBJECTIVES - The entity should establish its overall investment objective, which could be to generate income, preserve capital, support operations, provide scholarships, etc.
- b. ALLOCATION – This section discusses how the monies can be invested and how they are to be allocated among various types of investments. For example, the Statutes of the Supreme Council (Article VI, Section 10) limit the investment in common stocks to no more than 75% of the value of the funds owned by the Council. Obviously, other Scottish Rite entities should comply with this standard as a maximum exposure to equity investments, but any entity can certainly adopt a LOWER maximum investment in equities in their own policies.
- c. SPENDING POLICY – It is very important to document how monies are to be spend from the investment fund. Should the entity spend all income earned? If so, how will the fund grow? Some typical spending policies are to spend only 75% of the annual income and reinvest the remainder; or, spend a stated percentage of the fund's value, such as 4% or 5% per year.
- d. MONITORING – Regular reporting of investment activity should be made to the Investment/Finance Committee on at least a quarterly basis. Annually, the allocation of investments should be reviewed to insure that the actual amounts invested are in accordance with the allocation guidelines included in the policy.

ATTACHMENT A  
SAMPLE INVESTMENT POLICY GUIDELINE

*NOTE: The following is intended for illustrative purposes only and does NOT represent investment advice. This is merely a sample of how a policy COULD appear. Each entity must determine its own investment needs and acceptable risk levels prior to establishing a policy. This policy should NOT simply be copied and adopted without careful consideration of the investment goals and needs of the organization. It is STRONGLY recommended that multiple members with investment training and or experience be utilized to develop and monitor the policy.*

I. PURPOSE

This Investment Policy is adopted by the Board (or membership, etc.) of XX (the "Board") to direct the prudent investment of its investment portfolio (the "Portfolio") in a manner consistent with the investment objectives stated herein. The Board has authorized its Investment Committee (the "Committee") to provide oversight of the Portfolio.

This Investment Policy shall be used by the Committee in its duty to oversee (in managing, monitoring and reporting on the investment portfolio) the investment portfolio and by the Portfolio's Custodians, Investment Managers and other advisors. This document will be reviewed annually by the Committee. Any revisions will be recommended to the Board in writing.

SCOPE

This Policy applies to all assets that are included in the Portfolio for which the Committee has been given discretionary investment authority.

FIDUCIARY DUTY

In seeking to attain the investment objectives set forth in the policy, the Committee and its members must exercise due care.

II. OBJECTIVES

*Note: The Policy should include a performance objective, or goal, such as "inflation plus X% return, on average, per year. Obviously, with no goal, effective performance cannot be achieved.*

STRATEGY

*Note: In this section, the entity must determine what types of investing is allowed. For example, if the fund will be needed to grow to build a new facility, then long term growth is desired, which might suggest investment in mutual funds or stocks. If the entity will possibly need to cash out investments on short notice, this must also be understood.*



## ASSET ALLOCATION

Asset allocation is simply the amount of money invested or at least targeted, to major classes of investments, such as stocks or bond; or certificates of deposit and treasury bills.

The target expected rate of return is based upon the expected growth rate net of inflation, fees and spending expectations.

The Committee will allocate assets in such a way to achieve the expected long-term target rate of return. A combination of benchmarks corresponding to each asset class will combine to form the Entity's Policy Benchmark. The Committee will fully understand the potential risk and reward expectations associated with each asset class.

Deliberate management of the asset mix among classes of investments is both a necessary and desirable responsibility. In the allocation of assets, diversification of investments among asset classes that are not similarly affected by economic, political, or social developments is a highly desirable objective. The Committee's general policy shall be to diversify investments within both equity and fixed income securities so as to provide a balance that will enhance total return, while avoiding undue risk concentrations in any single asset class or investment category. The diversification does not necessarily depend upon the number of industries or companies in a portfolio or their particular location, but rather upon the broad nature of such investments and of the factors that may influence them.

To ensure broad diversification in the long-term investment portfolios among the major categories of investments, asset allocation, as a percent of the total market value of the total long-term portfolio, will be set with the following target percentage and within the following ranges (Cash will be minimized, but allowed, from time to time up to 5%):

ASSET CLASS	TARGET	MINIMUM	MAXIMUM
Large/Mid Cap Equity	35.0%	30.0%	40.0%
Small Cap Equity	15.0%	10.0%	20.0%
International Equity	20.0%	15.0%	25.0%
TOTAL EQUITY	70.0%	65.0%	75.0%
FIXED INCOME	30.0%	25.0%	35.0%

*Note: The above percentages are not intended to "add up." The table above represents a multi-stage series of targets and parameters. For instance, it suggests, merely as an example, that the maximum equity investment, is 75%, but within that classification, there are maximum levels on each of the sub-categories of equity. In this manner, the investment portfolio is not overly exposed to risks in any sub-category. Again, the selection of the asset allocation is one of the most critical decisions facing any organization and must be done based on facts relevant to the organization. The above table is MERELY and EXAMPLE.*

## REBALANCING

In maintaining these asset allocation targets, the Committee will strive to remain within the allocation ranges with the intent of rebalancing to targets as necessary. The appropriateness of this allocation will be reviewed annually by the Committee as part of its review of the Investment Policy Statement.

### III. IMPLEMENTATION

#### TIME HORIZON

The Finance Committee seeks to achieve or outperform the targeted expected returns, as defined by the asset allocation decision, over a full market cycle. The Finance Committee does not expect that all investment objectives will be attained in each year and recognizes that over various time periods, investment managers may produce significant over or under performance relative to the broad markets. For this reason, long-term investment returns will be measured over a 5-year moving period. The Finance Committee reserves the right to evaluate and make any necessary changes regarding investment managers over a shorter-term using the criteria established under "Manager Evaluation" below.

#### MANAGER EVALUATION

All investment returns shall be measured net of fees. Each investment manager will be reviewed by the Finance Committee on an ongoing basis and evaluated upon the following criteria:

- a) Avoidance of regulatory actions against the firm, its principals or employees;
- b) Adherence to the guidelines and objectives of this Investment Policy;
- c) Avoidance of significant deviation from the style and capitalization characteristics defined as "normal" for the manager;
- d) Ability to exceed the return of the appropriate benchmark index set no more frequently than annually by the Committee; and
- e) Ability to meet or exceed the median performance of a peer group of managers with similar styles of investing.

Managers failing to meet these criteria over a full market cycle will undergo extensive qualitative and quantitative analysis. This analysis will focus on the manager's personnel, philosophy, portfolio characteristics, and peer group performance to determine whether the manager is capable of implementing their defined portion of the overall portfolio structure.

### IV. SPENDING POLICY

As part of the Entity's long-term strategy to increase the values of its assets to enable it to carry out its purposes, the intent is to add back to principal a portion of the total investment return. Income available for spending is determined by a total return system. Annually the Entity will spend five percent (5%) of the beginning of the year value of the fund. Investment return in excess of five percent (net of investment management fees) shall be added back to principal.

#### ADOPTION

This policy was adopted by vote of the (Board, Committee, Members) on XX DATE.

GUIDELINES FOR ALMONERS OF THE SCOTTISH RITE BODIES  
OF THE  
SOUTHERN JURISDICTION, U.S.A.

**SELECTION OF AN ALMONER**

A new Almoner should be selected with much thought and care before he is recommended and nominated by the Brethren for election. The following questions should be given consideration:

What kind of man is he?

What is his background?

Is he married, and are he and his wife known for their acts of charity?

What is his personality and is he well suited to meet people?

Is he cautious and successful in business?

Has he a good mind, and is he capable of good judgment?

Is he active in church and other civic affairs and other organizations?

Is he going to be able to give the time that is required to make his duties a success?

**ASSISTANCE FOR THE ALMONER**

The Almoner should not have to do the job all by himself. He should have an assistant who has been trained and is experienced in the Almoner's duties and who is capable of acting in the Almoner's absence or illness. This will allow for the continuity and orderly function of the Almoner's office. Always, of course, it should be understood that the Almoner himself is primarily responsible, and that a qualified assistant, though he may be capable of acting individually, acts under the Almoner's supervision. The Almoner should be bonded, just as those handling funds for the Bodies are, with adequate protection for his operations.

The Almoner should have Brethren representatives in the various outlying area of the Valley. These Brethren should be trained to investigate cases that come to their attention and, after making the investigation, telephone the Almoner and report their findings. If the Almoner feels that the people in need are deserving of assistance, he should give the go-ahead to help, subject to certain maximums, of course.

**HANDLING CALLS FOR HELP**

When the Almoner receives a call from a Master Mason in distress, he should contact the Master or Secretary of the Brother's Blue Lodge and ask permission to give him temporary assistance. We sometimes forget that everything starts at the Blue Lodge level. The Almoner can assure the Blue Lodge that he is willing and ready to give further assistance, if necessary.

When a call for assistance comes from a Master Mason who is temporarily traveling through the area, this call should first be referred to the Masonic Services Bureau, and the Almoner can let them know that he is ready to assist, if and when needed.

## DISBURSEMENTS

It is fundamental that all properties of the Almoner may be disbursed or used only for charitable purpose. These properties consist of contributions to the Box of Fraternal Assistance. Contributions shall be verified by the signatures of any two officers at the times of collections and deposited in bank checking accounts. The Almoner may dispense these funds to the poor, the destitute, and the afflicted, without regard to race, religion, or color. There are two restrictions: the recipients must not know from where the assistance comes, and the membership must not know who receives it. Disbursements for all purposes shall be made by check signed by both the Almoner and either the Secretary or the Treasurer or similar officer, except in emergency cases with small sums.

See *Transactions of the Supreme Council*, 1931, page 89; 1949, pages 31-32; and Chapter 10, "Ceremony of Joint Installation," *Forms and Traditions of the Scottish Rite*.

It is important that the Almoner's fund not be diverted to other than charitable purposes, not only in light of the above, but because such a diversion would imperil the tax-exempt status of the charitable fund.

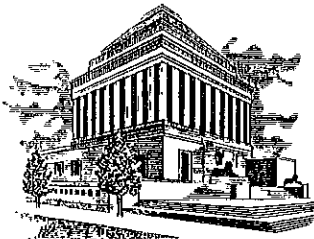
## LIMITATIONS ON ALMONER'S FUND

Each Almoner should transfer annually to the Lodge of Perfection of his respective Valley, for charitable purposes, that portion of his properties which exceeds the approximate sum total of the immediate past year's disbursements of the Almoner. The Lodge of Perfection should hold, earmark and invest these portions of the Almoner's Fund, in accordance with our Statutes, so far as applicable, as a special charitable fund and for the Almoner's charitable purposes, and should replenish to the Almoner therefrom such portion of said special charitable fund as may be needed from time to time for charitable purposes; provided, however, that if the total of said funds of the Almoner and of the Lodge of Perfection so held exceeds the sum total of \$25,000, then the excess should be transferred to the Scottish Rite Foundation of the Orient in which his Valley is a part. Each January, Almoners should report to the Sovereign Grand Inspector General or Deputy of the Orient the yearly total receipts and disbursement, amounts on hand, and any investments.

The Internal Revenue Service has confirmed that the Almoner's Fund should be included on the Valley's 990. The Secretary should make sure this is done.

The Supreme Council  
MOTHER COUNCIL OF THE WORLD  
OF THE  
THIRTY-THIRD AND LAST DEGREE

WILLIAM G. SIZEMORE, 33°  
REAR ADMIRAL, USN (RET.)  
GRAND EXECUTIVE DIRECTOR



HOUSE OF THE TEMPLE

1733 SIXTEENTH STREET, N. W.  
WASHINGTON, D. C. 20009-3199  
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ANCIENT AND ACCEPTED SCOTTISH RITE OF  
FREEMASONRY, SOUTHERN JURISDICTION, U. S. A.

April 1, 1996

TO: All Active Members, Deputies, and Secretaries  
FROM: William G. Sizemore  *W. G. Sizemore* 33°, G.:C.:  
RE: Records Retention Schedule **Grand Executive Director**

In response to our request our auditors have provided the attached Records Retention Schedule, which can serve as a general guideline for all Valleys but is not meant to be all-inclusive. Depending on the financial policies established in the individual Valleys, longer or shorter retention periods may be required.

If you should have any questions, please do not hesitate to call.

WGS/mb

Attachment

# WATKINS, MEEGAN, DRURY & COMPANY, L.L.C.

## RECORDS RETENTION SCHEDULE

Accident reports/claims (settled cases)	7 years	Journals	Permanently
Accounts payable ledgers and schedules	7 years	Magnetic tape and tab cards	1 year
Accounts receivable ledgers and schedules	7 years	Minute books of directors, stockholders, bylaws, and charter	Permanently
Audit reports	Permanently	Notes receivable ledgers and schedules	7 years
Bank reconciliations	2 years	Option records (expired)	7 years
Bank statements	3 years	Patents and related papers	Permanently
Capital stock and bond records: ledgers, transfer registers, stubs showing issues, record of interest coupons, options, etc.	Permanently	Payroll records and summaries	7 years
Cash books	Permanently	Personnel files (terminated)	7 years
Charts of accounts	Permanently	Petty cash vouchers	3 years
Checks (cancelled - see exception below)	7 years	Physical inventory tags	3 years
Checks (cancelled for important payments, i.e., taxes, purchases of property, special contracts, etc. Checks should be filed with the papers pertaining to the underlying transactions)	Permanently	Plant costs ledgers	7 years
Contracts, mortgages, notes, and leases (expired)	7 years	Property appraisals by outside appraisers	Permanently
Contracts, mortgages, notes, and leases (still in effect)	Permanently	Property records, including costs, depreciation reserves, year-end trial balances, depreciation schedules, blueprints, and plans	Permanently
Correspondence (general)	2 years	Purchase orders (except purchasing department copy)	1 year
Correspondence (legal and important matters)	Permanently	Purchase orders (purchasing department copy)	7 years
Deeds, mortgages, and bills of sale	Permanently	Receiving sheets	1 year
Depreciation schedules	Permanently	Retirement and pension records	Permanently
Duplicate deposit slips	2 years	Requisitions	1 year
Employment applications	3 years	Sales commission reports	3 years
Expense analyses/expense distribution schedules	7 years	Sales records	7 years
Financial statements (year end, other optional)	Permanently	Scrap and salvage records	7 years
Garnishments	7 years	Stenographer's notebooks	1 year
General/private ledgers, year-end trial balance	Permanently	Stock and bond certificates (cancelled)	7 years
Insurance policies (expired)	3 years	Subsidiary ledgers	7 years
Insurance records, accident reports, claims, policies, etc.	Permanently	Tax returns and worksheet, revenue agents' reports, and other documents relating to determination of income tax liability	Permanently
Internal audit reports (longer retention periods may be desirable)	3 years	Time books/cards	7 years
Internal reports (miscellaneous)	3 years	Trademark registrations and copyrights	Permanently
Inventories of products, materials and supplies	7 years	Training manuals	Permanently
Invoices (to customers, from vendors)	7 years	Union agreements	Permanently
		Voucher register and schedules	7 years
		Vouchers for payments to vendors, employees, etc. (includes allowances and reimbursement of employees, officers, etc., for travel and entertainment expenses)	7 years
		Withholding tax statements	7 years

Please keep in mind that the above are general retention guidelines and are not meant to be all-inclusive. Individual business practices and policies vary and may require longer or shorter retention periods.

FREEMASONRY  
BUILDS ITS TEMPLES  
IN THE HEARTS OF MEN  
AND AMONG NATIONS