

S E C R E T A R Y ' S M A N U A L

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

GARY L. SISSEL, 33°
Grand Secretary General

WILLIAM G. SIZEMORE II, 33°
Grand Executive Director

Revised May 2016

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NOTE: Valleys should use this manual in conjunction with 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 (electronic form available), as these cannot be entered in Sentinel by the Valley. 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. Failure to do so causes delay at the Supreme Council in processing the Brother's transfer to the affiliating Valley. The report of affiliation should give the name of the affiliated member's former Valley (use the space provided for the old address), his current address, the date of affiliation. Place an "X" in the spaces available to indicate the levels affected by the transfer.

Exhibit 1A. Sample Report of Affiliation

THE SUPREME COUNCIL, 33*, S.J., U.S.A. 1733 Sixteenth Street, NW, Washington, DC 20009-3103						
ID Number	Name in Full	Affiliating Valley				
01112223	John Quincy Mason	Baltimore, MD				
(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:				
Demitting from Cumberland, MD						
211 Any Street Catonsville, MD 22350		Date	Levels			
New Address (City, State and Zip Code)		Affiliated: 10/20/2015	x	x	x	x
		Reinstated:				
		Died:				
		Demitted:				
		Suspended:				
		Expelled:				

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 Bodies belonging to another Supreme Council, report should be on Form 330.

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

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

STATEMENT OF FEES AND REPORT OF INVESTITURES (FORM 330)

from

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

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

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 16, "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 T-Mail Report includes a list of members whose *Scottish Rite Journal* has been returned by the Post Office as lost.

Activity Reports are accessed from the “Members” tab on the Sentinel menu bar. For additional details see the Sentinel Step-by-Step Training Guide, Section: 4H.

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.

Annual Reports are delivered to the Valleys via the Sentinel System under the “Members” tab on the Sentinel menu bar. On the submenu, choose SC Published Reports.

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 February 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. WAIVER OF PER CAPITA FOR SENIOR MEMBERS

The Grand Commander may waive the Supreme Council's per capita assessment on "Senior Members" (those who are either 80 years of age or have 50 years or more of total membership) **who are in financial need** in conjunction with their Valley's waiving their annual dues. Such action will be based upon receiving from their Valleys the names and ID numbers of "Senior Members" who meet the foregoing requirements, certifying that their dues have been waived. **"Waivers, when granted by the Grand Commander, will be for one per capita year only."**

Senior exemptions are reported on Form 80(s). **The form must be signed by the Orient's Sovereign Grand Inspector General or Deputy.** Once the form is received and approved by the Grand Executive Director, the Computer Services staff will insert a senior code "S" to the senior member's Profile screen in the Sentinel System. This code can be searched to create reports (see Section 10 in the Sentinel Step-by-Step Training Guide), but the code cannot be manually added or removed by Valley Sentinel users.

For Valley Billing Valleys to ensure that members do not receive a dues notice with a balance due, the senior exemption Form 80(s) should be submitted between January and May of each year. The Computer Services staff will email a form and notify you of the yearly deadline. All other Valleys have until December 31 to report.

Exhibit 5A Form 80(s) Senior Member Per Capita Exemption Form

2015 Senior Member Program (Form 80s)

To be submitted to the Office of the Executive Director, Supreme Council, 33°

VALLEY: _____

ORIENT: _____

The following members meet the criteria of the Supreme Council *Statutes*, Article XVII, SEC. 26. [3], which states:

- (3) The Grand Commander may waive the Supreme Council's per capita assessment on "Senior Members" (those who are either 80 years of age or have 50 years or more of total membership) **who are in financial need** in conjunction with their Valley's waiving their annual dues. Such action will be based upon receiving from their Valleys the names and ID numbers of "Senior Members" who meet the foregoing requirements, certifying that their dues have been waived."

Waivers, when granted by the Grand Commander, will be for one per capita year only.

Membership Number	Name in Full

Signature of Active or Deputy: _____

Date: _____

6. 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 through the Sentinel System.

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.

7. 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 through the Sentinel System.

8. DEMISSION

A demission should be reported as promptly as possible to the Supreme Council 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 affiliation, not reinstatement. (Reinstatement is the procedure used to restore a Brother who was suspended.) He must present his Demit when petitioning to affiliate. The Valley should report his affiliation on the Form 660, "Change of Address and/or of Status" report, using the "Affiliation" line (See Exhibit 1A). Affiliations cannot be reported using the Sentinel System.

10. SUSPENSION

We ask that yearend status changes such as suspensions be submitted through Sentinel no later than January 15 so that our staff has ample time to process them for the Annual Report. We encourage Valleys to report early but no later than January 29. If received after January 29, these status changes may not be included in the Valley's annual report of membership activity for the preceding 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 Brother whose levels of membership are split between Valleys is suspended in his lower levels, 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. There are two types of reinstatement: members who have an existing "suspension" record in Sentinel and members who were suspended so many years ago that no record in Sentinel exists. Members may only reinstate in the Valley from which they were suspended.

If a Brother to be reinstated has a "suspension" record in Sentinel, the Valley may reinstate him through the Sentinel System. He will retain his original membership number. If a Brother to be reinstated has no membership record in Sentinel, the Valley should report the reinstatement to Computer Services on Form 660 (electronic form is available). Reports may be emailed to the Computer Services' staff that will then create a Sentinel record for the reinstated member, and the system will assign his permanent membership number.

Exhibit 11A. Sample of a Report of Reinstatement for a Member Not in Sentinel

THE SUPREME COUNCIL, 33*, S.J., U.S.A.
1733 Sixteenth Street, NW, Washington, DC 20009-3103

ID Number	Name in Full,	Valley:
01112222	John Quinton Mason	Baltimore, MD

(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:

Suspended 12/31/2000

	Date	Levels			
Affiliated:					
Reinstated:	10/20/2015	X	X	X	X
Died:					
Demitted:					
Suspended:					
Expelled:					

New Address (City, State and Zip Code)

111 Any Street
Kensington, MD 20895

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 Bodies belonging to another Supreme Council, report should be on Form 330.

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

Valleys should use the "Generate a Form 330" function in Sentinel to create and print a 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 over a long period of time or 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.

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 completed using the Sentinel System (see the *Sentinel Step-by-Step Training Guide* for instructions).

Exhibit 13A

10/21/2015	Form 330 - Statement of Fees and Report of Investitures Valley of Test Valley in the Orient of US				Page 1 of 1
	Lodge	Chapter	Council	Consistory	Fees
Thomas A. Edison 40 Static Ave Sacramento, CA 92451 Carmel(3) Carmel, CA Birth Date: 12/02/1960 Birth Place: Carmel, CA	08/15/2015	08/15/2015	08/15/2015	08/15/2015	\$31.00
Robert Lee Frost 33 Baker Street Gaithersburg, MD 20952 Timonium(5) Timonium, MD Birth Date: 08/21/1954 Birth Place: Gaithersburg, MD	08/15/2015	08/15/2015	08/15/2015	08/15/2015	\$31.00
Arthur Harpo Marx 201 marx Blvd Bel Air, MD 27845 Susquehanna(4) Bel Air, MD Birth Date: 12/08/1952 Birth Place: Bel Air, MD	08/15/2015	08/15/2015	08/15/2015	08/15/2015	\$31.00
Edgar A. Poe 23 Raven Road Baltimore, MD 20365 Pike(2) Baltimore, MD Birth Date: 04/18/1962 Birth Place: Baltimore, MD	08/15/2015	08/15/2015	08/15/2015	08/15/2015	\$31.00
Total Fees Required for this Form 330:					\$124.00

When adding candidates to Sentinel that will be included on a Form 330, 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.

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.)

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.

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. The dates on which he received the 18°, 30°, and 32° should be placed in the proper blocks.

Exhibit 13B. Sample of a Form 330 Report Showing Upper-Level Degrees Taken

STATEMENT OF FEES AND REPORT OF INVESTITURES

from
 _____ Lodge of Perfection
 _____ Chapter of Rose Croix
 _____ Cumberland Council of Kadosh
 _____ Cumberland Consistory
 Valley of _____ Cumberland _____ Scott H. Rite _____ Secretary
 Orient of _____ Maryland _____ Mailed on 11/1/2015

HISTORY	DATES OF INVESTITURE				FEES
	LODGE	CHAPTER	COUNCIL	CONSIST.	
Last Name, First Middle	Date	Date	Date	Date	
Street Address					
City, State, Zip Code					
DOB (Date of Birth)					
POB (Place of Birth) City,	State*	*if in a	differ-	ent	state.
OCC Specific occupation and	code				
BLUE LODGE Name & No., City	where	located &	State*		
Leave one	blank	row be-	tween	records.	
Mason, John Quinton			10/20/15	10/20/15	18.00
111 Any Street					
Kensington, MD 20895					
DOB 5/12/1970					
POB Charlotte, NC					
OCC Fireman FI					
Albert Pike 1, Bel Air MD					
Rogers, Robert Dale			10/20/15	10/20/15	18.00
1204 Pleasant View Road					
LaVale, MD 21502					
DOB 12/1/1964					
POB Cumberland, MD					
OCC X-Ray Technician ME					
Hiram 32, Baltimore, MD					

14. 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.

15. 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

16. 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, \$5.00;
duplicate, \$5.00.

Affiliation and corrected patents: \$5.00.

25-Year Certificate (blanks): shipping charge only

50-Year Certificate: original, plus lapel pin, shipping charge only;
duplicate, \$5.00, including shipping charge

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.

17. 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, states:

*** 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 _____

18 SUPREME COUNCIL FEES, DUES, ASSESSMENTS

LODGE OF PERFECTION

Letters Temporary	\$60.00
Permanent Charter	70.00
1 <i>Revised Standard Pike Ritual</i> on CD (4°-32°) (Loaned to Valley Secretary)	
1 <i>Scottish Rite Ritual, Monitor and Guide</i>	63.75
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>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	
(2017 payable 1/18 - \$8.80; 2018 payable 1/19 - \$9.60; 2019 payable 1/20 - \$10.40; 2020 payable 1/21 - \$11.20; 2021 payable 1/22 - \$12.00)	

CHAPTER OF ROSE CROIX

Letters Temporary	\$75.00
Permanent Charter	100.00
1 <i>Revised Standard Pike Ritual</i> on CD (4°-32°) (Loaned to Valley Secretary)	
Supreme Council Fee on Initiate, Chapter of Rose Croix Degrees	5.00
Per Capita Assessment, Annual, Chapter of Rose Croix	
(2017 payable 1/18 - \$4.40; 2018 payable 1/19 - \$4.80; 2019 payable 1/20 - \$5.20; 2020 payable 1/21 - \$5.60; 2021 payable 1/22 - \$6.00)	

COUNCIL OF KADOSH

Letters Temporary	\$75.00
Permanent Charter	100.00
1 <i>Revised Standard Pike Ritual</i> on CD (4°-32°) (Loaned to Valley Secretary)	
Supreme Council Fee on Initiate, Council of Kadosh Degrees	5.00
Per Capita Assessment, Annual, Council of Kadosh	
(2017 payable 1/18 - \$4.40; 2018 payable 1/19 - \$4.80; 2019 payable 1/20 - \$5.20; 2020 payable 1/21 - \$5.60; 2021 payable 1/22 - \$6.00)	

CONSISTORY

Letters Temporary	\$90.00
Permanent Charter	120.00
1 <i>Revised Standard Pike Ritual</i> on CD (4°-32°) (Loaned to Valley Secretary)	
Supreme Council Fee on Initiate, Consistory Degrees	5.00
Per Capita Assessment, Annual, Council of Consistory	
(2017 payable 1/18 - \$4.40; 2018 payable 1/19 - \$4.80; 2019 payable 1/20 - \$5.20; 2020 payable 1/21 - \$5.60; 2021 payable 1/22 - \$6.00)	

19. 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

20. REMITTANCES, ETC.

All orders and reports should be accompanied by the required fees. (See *Statutes*, Article XI, Secs. 5 and 6.) 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

21. BLANK FORMS FURNISHED BY THE SUPREME COUNCIL

- * Application for Dual Membership from Northern Masonic Jurisdiction (See Exhibit 43D)
- * Application for Dual Membership from the Philippines (See Exhibit 43E)
- * Application for Lady's Certificate (See Paragraph 36)
Certificate of Good Standing (See Paragraph 6)
- * Change of Address and/or of Status, Form 660 (See Paragraph 7)
Degree Blanks: Fifth; Eighteenth; Twenty-seventh, and Thirtieth
Demit (See Paragraph 8)
- * Dual/Plural Membership Form 440 (See Exhibit 43C)
Dues Notices (includes outer and return envelope) - Billed at cost
Identification (Dues) Cards (See Paragraph 22)
- * Membership Card Orders
- * Senior Member Exemptions
- * Statement of Fees and Report of Investitures (Form 330). (See Paragraph 13)
25-Year Membership Certificates. Valleys are invoiced for shipping charges.
(See Paragraph 34)

Read carefully and follow the instructions on all the forms.

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

22. MEMBERSHIP (DUES) CARDS AND DATE STICKERS

The Grand Executive Director shall have permanent plastic identification cards printed for all active members on the Valley's roll. Beginning with the Fall Classes in 2014, each Initiate will receive a "New Member Packet" from the Supreme Council which will include the member's permanent card. These packets will be printed and mailed directly to the Initiates *after* the Office of the Executive Director receives the Valley's Form 330 along with payment of all necessary fees. The Supreme Council urges the Valleys to report its Form 330 promptly so that the new members will receive their packets in a timely manner.

Beginning with the 2017 cards, all dues paying members and dues remitted members will receive a new plastic membership card each year. During the month of June, the Supreme Council will ship *all* cards directly to the Valleys for distribution. These cards will be affixed to a backing sheet, preprinted with the member's name and address, the Valley's return address, and the cards will be sorted in alphabetical order. Life Members, Endowed Members, and Perpetual Members will continue to use their current gold card as these cards are undated and thus never expire.

The Supreme Council will continue to provide durable Gold cards for members who have purchased a Life Membership (Endowed, Perpetual) as well as for members who are considered Life Members after reaching the 50-year mark. The latter designation is optional and is determined by the individual Valleys, as not all Valleys waive dues for 50-year members.

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.

23. ORDERING MEMBERSHIP CARDS

Valleys may order plastic membership cards from the Supreme Council for a variety of reasons that include the following:

- Members who are reinstating but were never issued a plastic card
- Members who are affiliating from another Valley
- Members who are affiliating from another jurisdiction
- Members who are affiliating as a Dual or Plural member
- Members who have purchased a Life Membership (Gold Card)
- Members who have reached the 50-year mark and are considered by the Valley to be Life Members (Gold Card)
- Members who have lost their original plastic card (\$5 replacement fee)*

**There is no charge to the Valleys for plastic cards with the exception of the \$5 lost-card replacement fee.*

There are currently five types of plastic card order forms:

- GOLD CARD 50-Year Order Form
- GOLD CARD (Lost) Order Form
- GOLD CARD Paid Life Member Order Form
- SILVER CARD (Lost) Order Form
- SILVER CARD Order Form

Valleys may obtain these electronic order forms from Supreme Council Computer Services. All forms may be submitted to Computer Services via email, fax, or regular mail. Upon receipt of an order, the cards will be printed and mailed to the Valley for distribution. The cards will arrive affixed to a backing sheet that fits into a #9 double-window envelope for mailing.

24. X1 Nonmembers

An X1 is complimentary on the Valley's mailing list but not a member of the Valley. (See Paragraph 28, *) 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.

25. MEMBER STATUS CODES

Status codes are a carryover from computer systems that were in use before the Sentinel System. We are phasing out these codes, but the following codes will continue to appear in the member status display in Sentinel for a short while longer:

- 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. SENTINEL DATABASE MANAGEMENT SYSTEM

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.

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.

26A. SAMPLE OF A MEMBER "PROFILE" SCREEN IN SENTINEL

The screenshot shows a web browser window titled "Washington-Member Profile - H. G. Wells - Windows Internet Explorer". The address bar shows "https://secure1.srmason-sj.org/MainPage.aspx". The page has a navigation bar with tabs: Members, Dues, Officers/Volunteers, Events, Valley, Data Offloading, Admin, and Logout. Below this is a sub-navigation bar with tabs: Profile, Other Addresses, Other Mem Info, Offices/Volunteer/Groups, Donations, Events, and Notes. The main content area is titled "H. G. Wells ID: 0" and includes a "Return" button and a "1 of 5" indicator. The profile is divided into several sections: "Member Name Information" (Prefix, First, Middle, Last, Nickname, Preferred Name, Suffix), "Valley Status" (Active Member, on 10/3/2007, S.C. Member Type: Null, Dues Status, Dual/Plural), "Address" (Type: Home, Status: Good, Line 1: 25 Feeling Really Good Lane, City/State: Washington DC, Zip: 20009, Country, Change Type: Original Add), "SC Mem Valley, Eff Date and Status Code" (L1, L2, L3, L4), "Telephone Numbers" (Home: 202-232-0111, Work, Cell), "Birth and Degree Dates" (Birth: 9/21/1886, 14*, 18*, 30*, 32*, 33*, GC, KCCH), "Reunion Number: 17121" and "Reunion Name: Paul Revere". At the bottom, there are sections for "Email Addresses" (1: wells@timemachine.q, Preferred?), "Signers" (1st: George Washington, Delete), and "Spouse Name" (Spouse First Name: Isabel).

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

Field/Button Name	Field/Button Information	Field/Button Description
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.
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
1st and 2nd Line Signers	Optional Field	Records the signer names
Spouse	Optional Field	Records the spouse's name

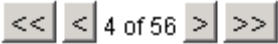
26B. A member's Profile screen contains links to other screens. The Other Member Info screen contains dues, occupation, Blue Lodge, and other information specific to the member.

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													
Job Information													
Employer:				Job Title:		Author							
Job Status:				Job Code:		Creative Arts							
User Defined Fields (Valley administrators: Set field descriptions under "Admin")													
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									
Member Dues Summary													
Current Dues Year:		0											
Current Statement Code:													
Current Status Code:													
Current Year Total Paid:		0											
Current Year Due Balance:		0											
Past Due Balance:		0											
Total Balance Due:		0											
Blue Lodge Information													
Lodge Name:													
Lodge Number:													
Lodge City:													
Lodge State:													
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 (>) moves you forward one record. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record. A button with a double backward arrow (<<) 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

Field/Button Name	Field/Button Information	Field/Button Description
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

For more information, please see the Sentinel Step-by-Step Training Guide provided by Supreme Council Computer Services.

For all Sentinel support and training, contact Computer Services:

Tammy Fannin, Manager
(tfannin@scottishrite.org),

Martha Bennett, Sentinel Training and Support Specialist
(mbennett@scottishrite.org).

27. VALLEY MEMBERSHIP SERVICES (Valley Billing System)

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 contained in the annual Dues Documentation form submitted by the Valley. These forms are emailed to participating Valleys by Computer Services prior to the August/September dues notice mailing. 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 **two** main Valley Membership Services' processing times are as follows:

<u>August/September</u>	Initial Dues Notices Printed & Mailed (dates may vary)
-------------------------	--

<u>March</u>	Follow-up Dues Notices Printed & Mailed;
--------------	--

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

We strongly suggest that Valleys use Sentinel to generate a Paid/Unpaid Roster on a regular schedule to track member payments. For more information, see the Sentinel Step-by-Step Training Guide, Section 4.A.

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 2 on the ID Card Authorization Form that is emailed 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 Paid/Unpaid roster, 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, Section 4: Reports.

b. Paid/Unpaid Roster. 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.

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. Then the Supreme Council Computer Services will guide the Valley through the dues conversion process.

28. 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.

29. 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.

30. 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.

31. 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 update addresses changes promptly in Sentinel.

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 that he has been affiliated or reinstated, or that the report of his death was in error.

32. SOCIAL MEDIA: FOLLOW US!

Social media is a way people create, share, and exchange information and ideas in virtual communities and networks on websites such as Facebook, Twitter, Instagram, and more!

This handy guide will help you find the Scottish Rite online.

FACEBOOK

Name	Type of Information	How to Use
Scottish Rite Freemasonry	Main account for all Scottish Rite, SJ-related news	Location: https://www.facebook.com/ScottishRiteFreemasonry . To follow it, create an account or log in with your existing one, then visit this page and click the “like” button.
House of the Temple	House of the Temple account for all news related to the museum, library, archives, & history	Location: https://www.facebook.com/houseofthetemple . To follow it, create an account or log in with your existing one, then visit this page and click the “like” button.

Sovereign Grand Commander	Mr. Seale's page for news relating to his travels and activities at the House of the Temple	Location: https://www.facebook.com/SovereignGrandCommander . To follow it, create an account or log in with your existing one, then visit this page and click the "like" button.
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TWITTER

Name	Type of Information	How to Use
@TheScottishRite	Main account for all things Scottish Rite, including meetings, events, workshops and cool historic facts	Go to Twitter.com , create an account or log in with your existing one, and search for @TheScottishRite. Once there, click "Follow."
@MasonicMuseum	House of the Temple account for all news related to the museum, library, archives, & history	Go to Twitter.com , log on and search for @MasonicMuseum. Once there, click "Follow."

INSTAGRAM

Name	Type of Information	How to Use
scottishritesj	Main photo- and video-sharing page for all things Scottish Rite	Go to instagram.com , create an account or log in with your existing one, type in the address http://instagram.com/scottishritesj and click "Follow."
masonicmuseum	Our House of the Temple photo- and video-sharing page for all things related to the museum, library, archives, & history	Go to instagram.com , create an account or log in with your existing one, type in the address http://instagram.com/masonicmuseum and click "Follow."

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 complimentary subscriber file to receive the *Scottish Rite Journal*. The Supreme Council Computer Services will periodically 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:

- (A) Deceased member's name and ID number;
- (B) Name and mailing address of the widow

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. 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 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 50th 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^o 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 30 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. Duplicate certificate charge is \$5 each, including shipping charge. 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.fraternal Supplies.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

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.turinfez.com
E-mail: Turinfez@aol.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.

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 21, "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, the printed copies (not the CD) 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. The Ritual CD may not be loaned or copied, nor be removed from the Secretary's office.

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 Elizabeth Sizemore at esizemore@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 (32 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 place orders through Elizabeth Sizemore at esizemore@scottishrite.org 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. Each Valley is required to file an Internal Revenue Service Form 990, 990EZ, or 990N annually.

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 \$50,000 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. If the exempt status of a Valley is revoked the Valley will be required to file a new application for exemption, Form 1023, with the IRS.

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

It is most important that all initiations and any 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. Status 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.

44. DUAL AND PLURAL MEMBERSHIP

A Valley may receive and act upon 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 43A). 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 43C). 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 43D). 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 43E). 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 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.

Suspension of a Dual or Plural member for any reason other than non-payment of Scottish Rite dues carries with it suspension in all Valleys to which the member is affiliated. Upon receiving a report of suspension for other than non-payment of dues, 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 active 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*, 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	Yes
ARIZONA	Yes	Yes
ARKANSAS	Yes	Yes
CALIFORNIA	Yes	Yes
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 AND KOREA	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
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

<u>ORIENT</u>	<u>DUAL</u>	<u>PLURAL</u>
PUERTO RICO	Yes	No
SOUTH CAROLINA	Yes	Yes
SOUTH DAKOTA	Yes	Yes
TAIWAN AND CHINA	Yes	Yes
TENNESSEE	Yes	Yes
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) 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).

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 doctors 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 1-800-616-8759. 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 1-800-247-1771. 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, Artrial 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. The toll free number is 1-866-556-7283. Be certain to state that you are with the Scottish Rite, Southern Jurisdiction.

59. SCOTTISH RITE SCHOLARSHIPS AT GEORGE WASHINGTON UNIVERSITY

The following programs are handled by the George Washington University (GWU) for Study Exclusively at GWU:

59A. UNDERGRADUATE PROGRAM

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 for up to four years of study 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. An overview may be found on our website <http://scottishrite.org>. Please visit GWU's site for complete information including full eligibility requirements, necessary documentation, and application deadlines.

59B. GRADUATE PROGRAM

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. An overview may be found on our website <http://scottishrite.org>. Please visit GWU's site for complete information including full eligibility requirements, necessary documentation, and application deadlines.

60. SCHOLARSHIP PROGRAMS HANDLED BY THE SUPREME COUNCIL

Qualifications for Scholarship Programs offered by the Supreme Council, Southern Jurisdiction, require an applicant to have a Masonic background. Eligibility requirements include U.S. citizenship and a verified affiliation with a Masonic organization. Application forms are available for online completion and completed forms will be accepted between January 1 and March 31. Paper applications will not be accepted. Please see our website <http://scottishrite.org>.

60A. 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. 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. Two scholarships are offered, each in the amount of \$15,000 to be paid over a period of two years, i.e., \$7,500 for each of two years, to study in an accredited university of the individual's choice. Please visit our website <http://scottishrite.org> for complete information including full eligibility requirements, necessary documentation, application forms and deadlines.

60B. SHEPHERD SCHOLARSHIP

The Shepherd Scholarship 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 \$2,000 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. Please visit our website <http://scottishrite.org> for complete information including full eligibility requirements, necessary documentation, application forms and deadlines.

60C. SAM AND MILLIE HILBURN SCHOLARSHIP

The Sam and Millie Hilburn scholarships for graduate students studying to become specialists in the field of Childhood Language Disorders are \$5,000 per year towards tuition costs for a maximum of two years. Up to four scholarships are awarded each year. Applications must be received each year by the Director of Education on or before April 1. Please visit our website <http://scottishrite.org> for complete information including full eligibility requirements, necessary documentation, application forms and deadlines.

60D. SOVEREIGN GRAND COMMANDER'S SCHOLARSHIP

The Sovereign Grand Commander's Scholarship Program 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. Please visit our website <http://scottishrite.org> for complete information including full eligibility requirements, necessary documentation, application forms and deadlines.

61. 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 (click on "Brothers In The Community," 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 for \$7.00 each, plus shipping cost. Unless notified otherwise, the packages are shipped FedEx Ground. You are encouraged to adopt this opportunity for recognition of special youth in the JROTC high schools located in your Valley.

62. 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 (click on "Brothers In The Community," 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, for \$7.00 each, plus shipping cost. Unless notified otherwise, the packages are shipped FedEx 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.

63. 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.

64. 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.

65. 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. 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 16th Street, NW
Washington, DC 20009
202-777-3143
mszramoski@scottishrite.org

James "Chuck" Morgan, 33°
Major Donor Officer - Southeast
1733 16th Street, NW
Washington, DC 20009
225-921-2295
cmorgan@scottishrite.org

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

Thomas E. Broderick, 32°
Major Donor Officer – Mid-Atlantic
1733 16th Street, NW
Washington, DC 20009
757-761-4138
tbroderick@scottishrite.org

Don Heath, 32°, KCCH
Major Donor Officer – West Coast
1733 16th Street, NW
Washington, DC 20009
858-335-2070
dheath@scottishrite.org

66. 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, or call the Director of Development at 202-777-3143.

67. 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, or call the Director of Development at 202-777-3143 or the Gifts and Communications Coordinator at 202-777-3111.

68. 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.

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

69. DONOR RECOGNITION PROGRAM

Under the Donor Recognition Program, any donor who contributes \$100 or more to a Supreme Council foundation will be recognized by the Supreme Council.

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

70. DIRECT MAIL PROGRAM

Each year, as an 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. Similarly, a mailing is done in the spring with a small gift.

71. 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.

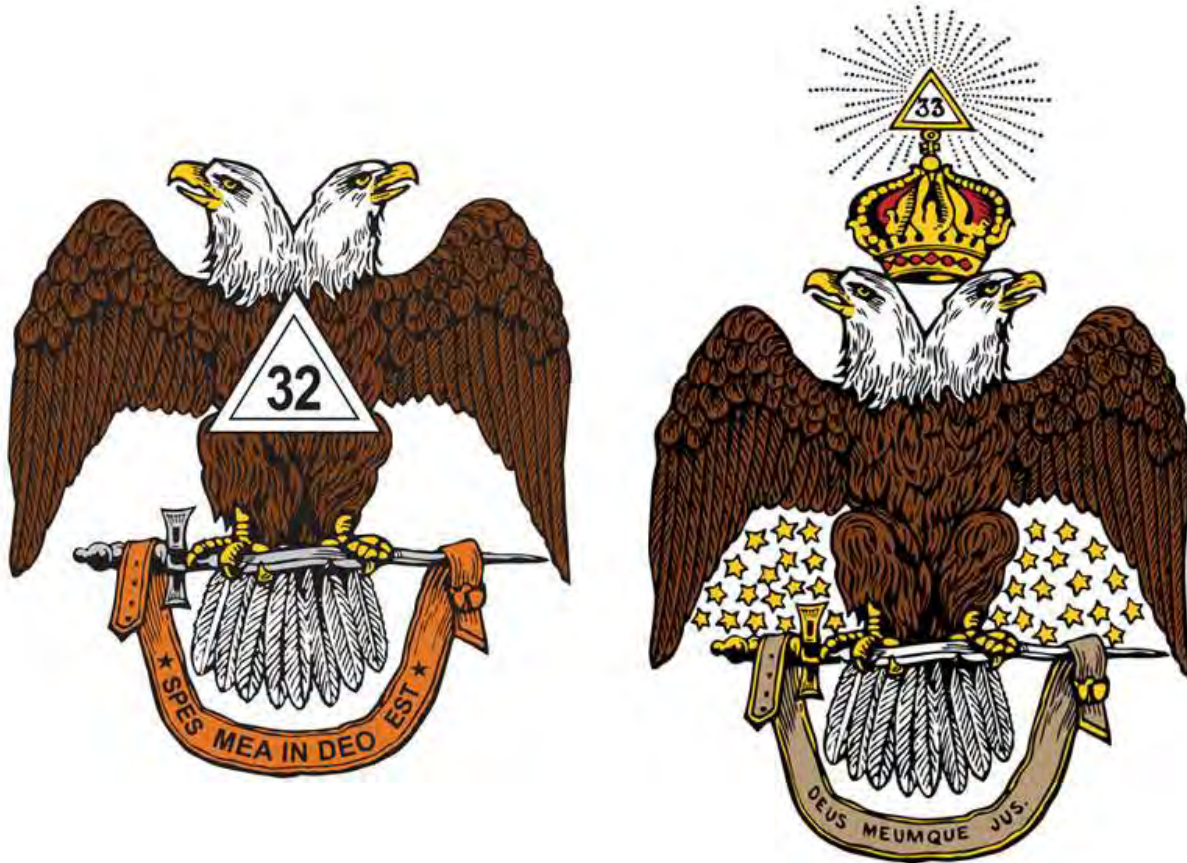
The Rebuilding the Temple Campaign is an effort that is part of the House of the Temple Historic Preservation Foundation, Inc., which is a non-profit Virginia corporation recognized as a tax-exempt public charity under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended. Its tax identification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

72. CELEBRATING THE CRAFT (CTC)

Held on the third Saturday of May each year, this event is broadcast over the Web at www.scottishrite.org. CTC is similar to a telethon. Fifty percent of the funds raised support the House of the Temple Historic Preservation Foundation and fifty percent goes to Orient 501(c)3 charities.

73. DOUBLE EAGLE COLLECTIVE MARKS

The Supreme Council, 33°, has registered with the Patent and Trademark Office 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 which is used to show the manufacturer or provider of a good or service.) Orients, Valleys and 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.

74. ORIENT & VALLEY NUMBERS

	<u>ORIENT VALLEY #</u>	
<u>ALABAMA</u>	010	
Birmingham	010	05
Dothan	010	10
Huntsville	010	15
Mobile	010	20
Montgomery	010	25
Shoals Valley	010	30
<u>ALASKA</u>	030	
Anchorage	030	05
Fairbanks	030	10
Juneau	030	15
Ketchikan	030	20
<u>ARIZONA</u>	050	
Phoenix	050	05
Tucson	050	10
<u>ARKANSAS</u>	070	
Fayetteville	070	05
Little Rock	070	10
Jonesboro	070	15
<u>CALIFORNIA</u>	100	
Bakersfield	100	05
Burlingame	100	10
Fresno	100	15
Long Beach	100	20
Los Angeles	100	25
Northern California	100	28
Oakland	100	30
Palm Springs	100	33
Pasadena	100	35
Sacramento	100	40
San Bernardino	100	45
San Diego	100	50
San Fernando Valley	100	55
San Francisco	100	60

	<u>ORIENT VALLEY #</u>	
San Jose	100	65
Santa Ana	100	73
Santa Barbara	100	70
Santa Rosa	100	75
Stockton	100	80
Ventura	100	83
<u>COLORADO</u>	160	
Denver	160	05
Grand Junction	160	15
Colorado Springs-Pueblo	160	20
<u>DISTRICT OF COLUMBIA</u>	190	
Washington	190	05
<u>FLORIDA</u>	220	
District of Balboa, Valley of Miami	220	01
Fort Myers	220	05
Jacksonville	220	10
Key West	220	15
Lake Worth	220	20
Miami	220	25
Ocala	220	30
Orlando	220	35
Panama City	220	40
Pensacola	220	45
Tallahassee	220	55
Tampa	220	60
<u>GEORGIA</u>	230	
Albany	230	05
Atlanta	230	10
Augusta	230	15
Columbus	230	20
Macon	230	25
Savannah	230	30

	<u>ORIENT VALLEY #</u>	
<u>HAWAII AND GUAM</u>	270	
Agana, Guam, M.I.	640	10
Hilo	270	05
Honolulu	270	10
Kahului	270	15
<u>IDAHO</u>	290	
Boise	290	05
Coeur d'Alene	290	10
Lewiston	290	15
Pocatello	290	20
<u>IOWA</u>	320	
Cedar Rapids	320	05
Clinton	320	10
Davenport	320	15
Des Moines	320	20
Sioux City	320	25
<u>JAPAN AND KOREA</u>	340	
Kitanakagusuku, Okinawa	640	05
Tokyo, Japan	340	05
Seoul, Korea	340	15
<u>KANSAS</u>	360	
Fort Leavenworth	360	05
Fort Scott	360	10
Northeast Kansas	360	15
Lawrence	360	20
Salina	360	25
Topeka	360	30
Wichita	360	35
<u>KENTUCKY</u>	380	
Covington	380	05
Lexington	380	10
Louisville	380	15
Madisonville	380	20

	<u>ORIENT VALLEY #</u>	
<u>LOUISIANA</u>	400	
Baton Rouge	400	05
Lake Charles	400	10
Monroe	400	15
New Orleans	400	20
Shreveport	400	25
<u>MARYLAND</u>	420	
Baltimore	420	05
Cumberland	420	10
Frederick	420	15
Salisbury	420	20
Southern Maryland	420	25
Susquehanna	420	30
<u>MINNESOTA</u>	450	
Duluth	450	05
Hibbing	450	10
Minneapolis	450	15
Rochester	450	18
St. Paul	450	20
<u>MISSISSIPPI</u>	470	
Clarksdale	470	10
Corinth	470	05
Gulfport	470	15
Hattiesburg	470	20
Jackson	470	25
Meridian	470	30
<u>MISSOURI</u>	490	
Columbia	490	05
Joplin	490	10
Kansas City	490	15
St. Joseph	490	20
St. Louis	490	25

	<u>ORIENT VALLEY #</u>	
<u>MONTANA</u>	510	
Billings	510	05
Butte	510	10
Great Falls	510	15
Helena	510	20
Livingston	510	25
Western Montana	510	30
<u>NEBRASKA</u>	530	
Alliance	530	05
Hastings	530	10
Lincoln	530	15
Omaha	530	20
<u>NEVADA</u>	550	
Las Vegas	550	05
Reno	550	10
<u>NEW MEXICO</u>	580	
Las Cruces	580	05
Santa Fe	580	10
<u>NORTH CAROLINA</u>	600	
Asheville	600	05
Charlotte	600	10
Enfield	600	15
Franklin	600	18
Greensboro	600	20
New Bern	600	25
Raleigh	600	30
Wilmington	600	35
Winston-Salem	600	40
<u>NORTH DAKOTA</u>	620	
Bismarck	620	05
Fargo	620	15
Grand Forks	620	20
Langdon	620	25
Minot	620	30

	<u>ORIENT VALLEY #</u>	
<u>OKLAHOMA</u>	660	
Guthrie	660	05
McAlester	660	10
Tulsa	660	15
<u>OREGON</u>	680	
Baker	680	05
Coos Bay	680	10
Eugene	680	15
Klamath Falls	680	20
Medford	680	25
Pendleton	680	30
Portland	680	35
Roseburg	680	40
Salem	680	45
<u>PUERTO RICO</u>	710	
Arecibo	710	05
Caguas	710	10
Cayey	710	15
Humacao	710	20
Mayaguez	710	30
Ponce	710	35
San Juan	710	40
<u>SOUTH CAROLINA</u>	730	
Aiken	730	05
Charleston	730	10
Columbia	730	15
Greenville	730	20
Rock Hill	730	23
Spartanburg	730	25
<u>SOUTH DAKOTA</u>	750	
Aberdeen	750	05
Deadwood	750	10
Sioux Falls	750	15
Yankton	750	20

	<u>ORIENT VALLEY #</u>	
<u>TAIWAN AND CHINA</u>	140	
Taipei, Taiwan	140	15
<u>TENNESSEE</u>	790	
Chattanooga	790	05
Knoxville	790	10
Memphis	790	15
Nashville	790	20
<u>TEXAS</u>	820	
Austin	820	05
Dallas	820	10
El Paso	820	15
Fort Worth	820	18
Galveston	820	20
Houston	820	25
Lubbock	820	27
Rio Grande	820	28
San Antonio	820	30
Waco	820	35
<u>UTAH</u>	850	
Salt Lake City	850	05
<u>VIRGINIA</u>	870	
Alexandria	870	05
Danville	870	10
Lynchburg	870	15
Newport News	870	20
Norfolk	870	25
Portsmouth	870	30
Richmond	870	35
Roanoke	870	40
<u>WASHINGTON</u>	890	
Bellingham	890	05
Bremerton	890	10
Everett	890	15

	<u>ORIENT VALLEY #</u>	
Kelso	890	25
Kennewick	890	30
Olympia	890	35
Seattle	890	40
Spokane	890	45
Tacoma	890	50
Vancouver	890	53
Walla Walla	890	55
Wenatchee	890	60
Yakima	890	65
<u>WEST VIRGINIA</u>	910	
Bluefield	910	05
Charleston	910	10
Clarksburg	910	15
Huntington	910	20
Logan	910	25
Martinsburg	910	30
Morgantown	910	35
Parkersburg	910	40
Wheeling	910	45
<u>WYOMING</u>	930	
Cheyenne	930	05
Lander	930	08
Sheridan	930	10

75. 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 7 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.

76. 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 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 an ACH transfer for reimbursement. This report is delivered via Sentinel reports under the “Members” tab on the Sentinel menu. Choose “SC Published Reports” from the dropdown menu.

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

Waiver of Per Capita for Senior Members

A Membership Primer

Electronic Petitions

Twenty-five Year Certificates

50-Year Membership Awards

Pamphlets Available from the Supreme Council

Request for Sojourner Labels or Rosters

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 2016 ANNUAL SCHEDULE OF OUTPUTS TO AND INPUTS FROM VALLEY

January:

Form for reporting 2015 Valley officers due from Valleys by **January 31, 2016.**

Valleys must process year-end suspensions in the Sentinel system by **January 28, 2016.**

Form for Ordering Blank Reporting Forms emailed to Valleys.

Questionnaire for Profile of Fees, Dues, and Reunions emailed to Valleys.

Questionnaire for 2016 Meetings & Reunions Schedule emailed to Valleys

February:

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

2015 Senior Exempt status cleared from Sentinel. Form 80s for the 2016 Senior Exempt members emailed to Valleys.

Invoices for Balance Due on 2015 Per Capita Assessment sent to Valleys.

Questionnaire for Profile of Fees, Dues, and Reunions due from Valleys by **February 22, 2016.**

Questionnaire for 2015 Meetings & Reunions Schedule due from Valleys by **February 29, 2016.**

March:

2016 Follow-up Dues Notices mailed to members of Valleys using Membership Billing Services

2017 ID Card Information Form and 2017 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

Dated 2017 stickers for the plastic membership cards printed and mailed to Valleys.

2017 blank paper membership cards mailed to Valleys (for temporary use)

July: Open

August (tentative)

2017 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.

Invoice for 90% of Year 2016 Per Capita Assessment mailed to Valleys.

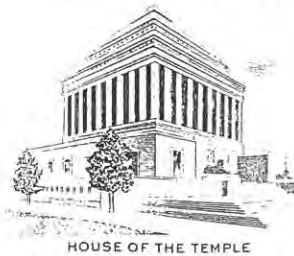
December:

Form for reporting officers for 2016 emailed to Valleys that have not entered its officers in Sentinel.

Labels, Rosters, and Downloads Order Form for 2016 sent to Valleys currently ordering items.

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.

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.

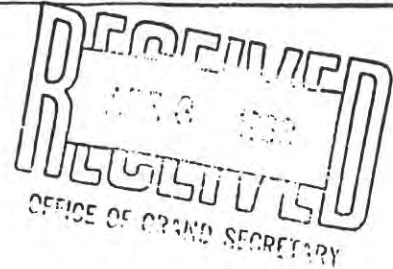
MEMORANDUM *from the Grand Commander...*

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 brethren's 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

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 stylized signature of C. Fred Kleinknecht, written in cursive, with a small decorative flourish to the left and a circular emblem containing the number 33 to the right.

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.

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

April 9, 2012

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

FROM: William G. Sizemore



G.:C.:

GRAND EXECUTIVE DIRECTOR

RE: Waiver of Per Capita for Senior Members

The increasing numbers of requests from Valley Secretaries for waivers of per capita for Senior Members suggests possible misinterpretation of Supreme Council *Statutes*, Article XVII, SEC. 26. [3], which states:

- (3) The Grand Commander may waive the Supreme Council's per capita assessment on "Senior Members" (those who are either 80 years of age or have 50 years or more of total membership) **who are in financial need** in conjunction with their Valley's waiving their annual dues. Such action will be based upon receiving from their Valleys the names and ID numbers of "Senior Members" who meet the foregoing requirements, certifying that their dues have been waived."

Commencing immediately, requests for waivers of per capita assessments for Senior Members should be submitted through the Active/Deputy, for verification of need and the waiving of annual dues, to the Grand Executive Director who in turn will then submit them to the Grand Commander for action. Waivers, when granted by the Grand Commander, will be for one year only.



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

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

Memo

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

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) and Dean Alban of our Membership Services Department (202.777.3109, 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).

RAS:fj

Enclosure

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:

(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.

CFK:ca

1733

SIXTEENTH

STREET NW

WASHINGTON

DC 20009-3103

ANCIENT AND

ACCEPTED SCOTTISH

RITE OF FREEMASONRY

SOUTHERN JURISDICTION

UNITED STATES

OF AMERICA

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.

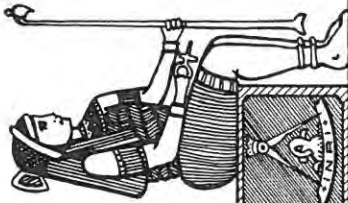

Sovereign Grand Commander 

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.

into all Freemasons of the said Rite throughout the World

KNOW YE, THAT

Derward G. Hoffman, 32°, K.:C.:C.:H

whose name, *ne 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 hereunto 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.:.

William S. Smith
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.

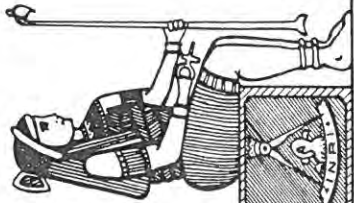
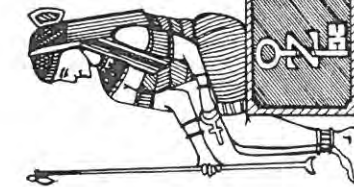
WGS/mb
Enclosures

SAMPLE - "LASER-PRINTED STYLE"

B



IN DEO FIDUCIA NOSTRA



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

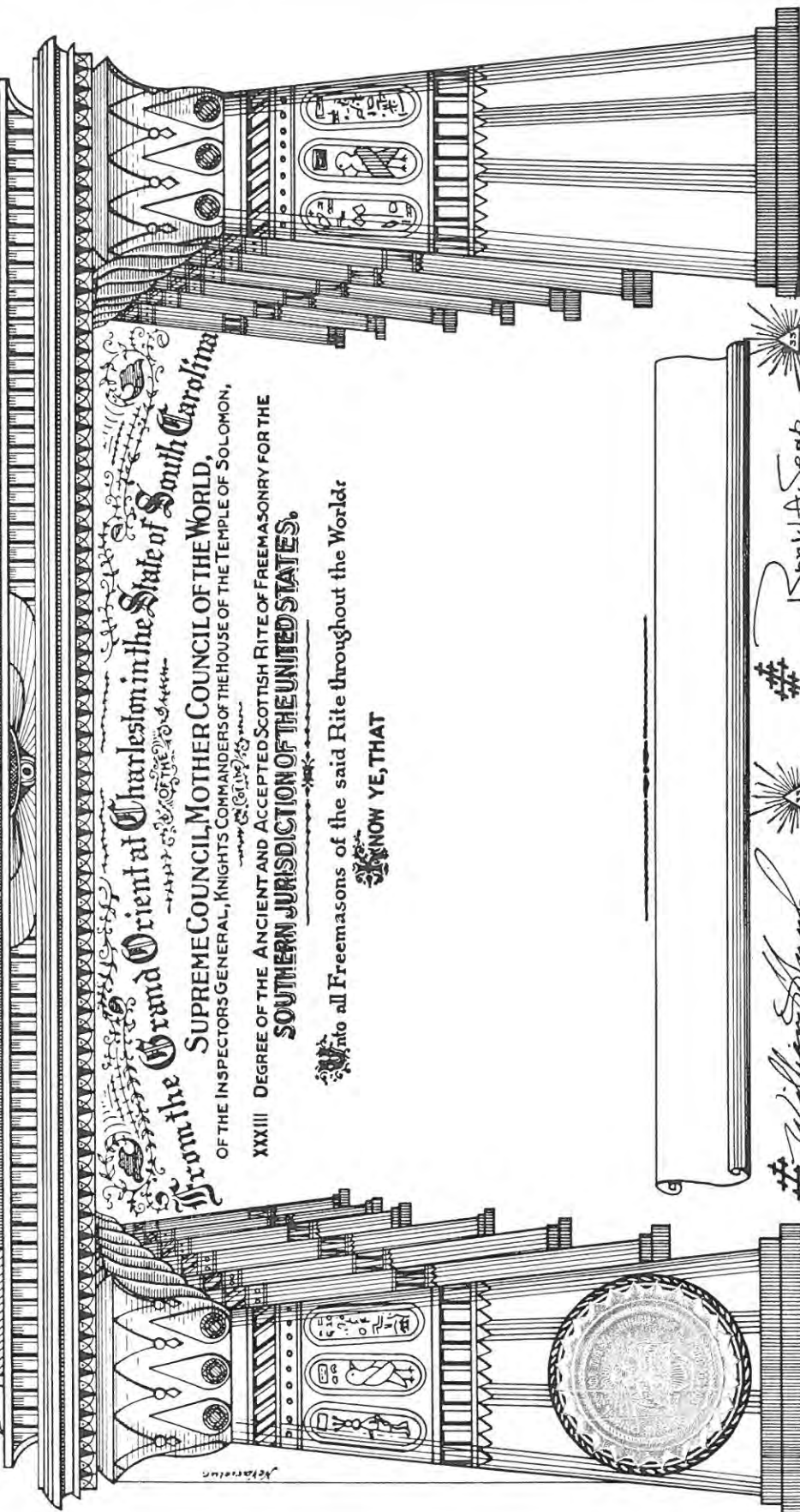
XXXIII DEGREE OF THE ANCIENT AND ACCEPTED SCOTTISH RITE OF FREEMASONRY FOR THE
 SOUTHERN JURISDICTION OF THE UNITED STATES.

to all Freemasons of the said Rite throughout the World:
 NOW YE, THAT

William S. Smith
 GRAND SECRETARY GENERAL



Ronald A. Seale
 SOVEREIGN GRAND COMMANDER

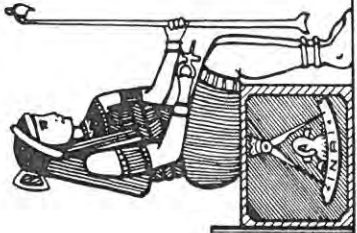


SAMPLE- "FULLY PRINTED STYLE"

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 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

Do all Freemasons of the said Rite throughout the World

NOW YE, THAT

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
 V. E.

William S. Smith
 GRAND SECRETARY GENERAL

Ronald A. Seale
 SOVEREIGN GRAND COMMANDER





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

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 50th 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

Thoughts about America

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

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

2016 REQUEST FOR SOJOURNER LABELS OR ROSTERS
(Complete Request form and return to the Supreme Council)

VALLEY:

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).

☐ Living in the state but not members of this Valley (Can be done using Sentinel)

* ☐ Living in just the zip-code areas specified below, but not members of this Valley (Can be done in Sentinel)

The following two Sojourner orders require the approval of your Valley's SGIG or Deputy:

☐ Living in the state but not members of Valleys in this Orient (Cannot be done Using Sentinel. Labels or roster must be ordered.)

* ☐ Living in just the zip-code areas specified below, but not members of Valleys in this Orient. (Cannot be done using Sentinel. Labels and rosters must be ordered).

* 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:

(Continue on reverse side, if necessary)

Check one of the following:

☐ Pressure sensitive labels (3 names and addresses across) = \$0.03 per label

☐ Roster (8½" x 11" paper, one line per record) = \$0.0069 per name for a hard copy

☐ Downloaded file = \$25.00. Select one type of file format:

☐ ASCII, comma-delimited;

☐ ASCII, tab-delimited (Suitable for MS WORD);

☐ ASCII, pipe-delimited;

☐ MS EXCEL;

(Supply E-mail address:

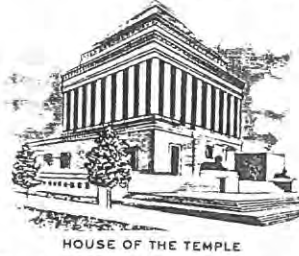
Name:

Title:

Date: [Click here to enter a date.](#)

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



William G. 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.

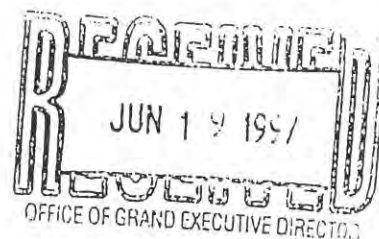


FORCE MANAGEMENT
POLICY

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, 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.
- Northern Masonic Jurisdiction: Refer to: 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.

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

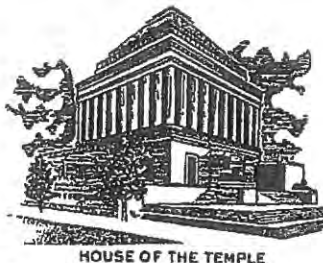
Sponsoring Valley

Officer

Secretary

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

WILLIAM G. SIZEMORE, 33°, G.:C.:
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*
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



FORCE MANAGEMENT
POLICY

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

AUG 30 2002



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

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, then "Where We Are" at bottom of the page, and "Location of Scottish Rite Valleys").

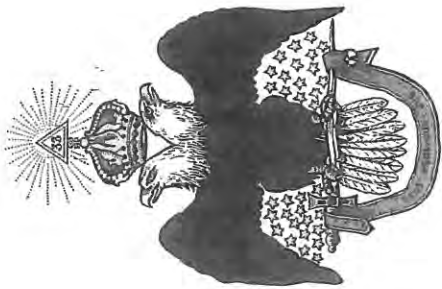
- Southern Jurisdiction: Requests for the award should be sent to the nearest Scottish Rite Valley of the Southern Jurisdiction. (For locations, refer to the map described above and click on the desired state) or to the National Headquarters, William G. Sizemore, Grand Executive Director, telephone: 202-232-3579, or email: wsizemore@scottishrite.org.
- Northern Masonic Jurisdiction: Refer to: 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.

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.

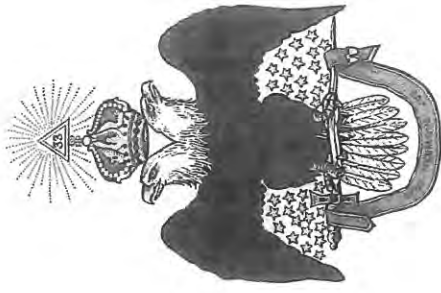


ROTC Award Medal and Purple Ribbon
With Gold Stripe Down Center
Presented by the Scottish Rite to
Students Enrolled in ROTC at Colleges or Universities





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

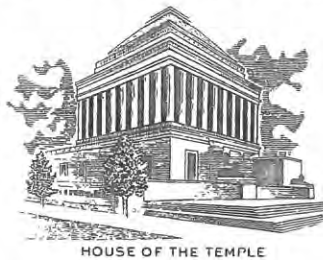
Sponsoring Valley

Officer

Secretary

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  G.:C.:

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


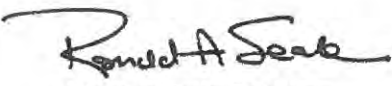

The Supreme Council, 33°
1733 Sixteenth Street, NW
Washington, DC 20009-3103

Memo

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



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

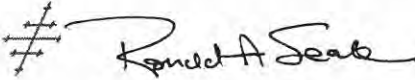

The Supreme Council, 33°
1733 Sixteenth Street, NW
Washington, DC 20009-3103

Memo

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.

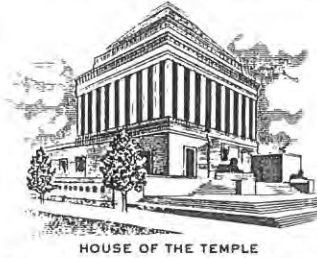
LIMITATIONS ON ALMONER'S FUND

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.
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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*
RE: Records Retention Schedule **Grand Executive Director**

33°, G.C.:

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, 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