

Grand Chapter of Missouri Annual Return Instructions: Please read these instructions in full

The Annual Return has been only slightly updated in an effort to make it easier for you to complete and provide the information needed to maintain the membership records of the Grand Chapter. Many of you requested an annual return which is shorter and more brief; we find that this cannot be accomplished and fit the needs of all Chapters of Missouri. Your organization may not have need for all the information requested, but others do.

Your return may be filled out using Adobe Reader (free download from www.Adobe.com), typed or neatly printed. If you use the Adobe form, it is strongly recommended that you print off a copy to use as a work copy. When the work copy is completed, you may transfer the information to the electronic copy, Save it on your computer, then Print off the final copy to be signed and returned. If you do not use the electronic version, please try to have your return typed if you know your writing is difficult to read.

Some of you have refused to submit the audit with your return; this will not be acceptable for any future returns. Some of you have questioned the need of the audit, however, it is a requirement outlined in the Laws and Regulations of the Grand Chapter and therefore required.

GENERAL INFORMATION

Date Fields: A date must be complete, as in mm/dd/yyyy. Month and year are not acceptable for any date fields.

Dimits: Many do not understand the Dimit section. A member may only dimit from your organization if their dues are paid in full for the current year, they request in writing such dimit, and (1) they choose to cease their membership in your organization, or (2) transfer their membership. You will issue a Certificate of Dimit to that member without vote. If you do not have a *form*, you may simply write a letter stating the necessary information, i.e., is a member in good standing and at his request is issued said dimit for the purpose of... You are required to inform the Grand Secretary/Recorder of this action when it happens, not just at the end of the year. A member who has not paid their dues for the current year may not request a dimit and have it granted.

Suspensions: A member must be suspended if they have not paid their dues and the organization has chosen not to remit their dues. A member may **not** request a dimit in order to terminate their membership if they are not current in their dues. Additionally, in the Return, there are two sections under suspensions (1) member has been suspended by the prerequisite organizational membership, i.e., Lodge for non-payment of dues (SNP - Suspended), and (2) suspended by your organization for NPD – Non-Payment of Dues. We need you to complete the annual return properly so we can get an accurate accounting for why members were suspended.

Paper Return: In completing your return, if you find you need additional pages, simply have the necessary page copied and insert it where appropriate. You **may** use a blank sheet of paper for additional entries **only if** you supply us with all the necessary information. It **must** be typed or neatly printed.

Electronic Return: In completing your return, if you find you need additional pages, you will need to complete the page in question, print it off, then complete the page again with the new information and print it off again. To print a single page of the report, select File, Print, choose Print Current Page, and select OK. The form is set up for you to use the TAB key to move from field to field. You may use SHIFT-TAB to back up or simply click on the field. If you find you need to use additional pages, please make sure the total count on the bottom of each section reflects ALL items including those used on additional pages – but make sure that the final electronic version has the final total for each section which will be used to auto-calculate your return on the Recapitulation Page.

If you have any questions with the completion of your Annual Return, please contact the office and we will assist you.

DETAILED INSTRUCTIONS

COVER PAGE: Enter the official name of the Chapter. If unsure, refer to the charter. Enter the number of the Chapter. Enter the Tax ID number of the Chapter. If your Chapter doesn't have one, you must get one. Leave Date Received, Amount Paid, and Check No. blank, these are for office use only.

PAGE 2: Enter the name of the Chapter and Number at the top of *each page on the return*. List all Officers or officers-elected/appointed for next year. Use full legal names and complete all information requested. No officer may hold two offices at the same time.

Meeting Location: Enter the name of the Masonic Temple or Lodge where the Chapter meets. Provide the complete physical address of the facility, not the mailing address of the Secretary. Provide a phone number if one is available.

Stated Convocations: Enter the date and time of the stated convocations of the Chapter in accordance with the approved by-laws of the organization.

PAGE 3: EXALTATIONS: Enter the full legal name, date of birth, address, city, state, zip, phone number of each new member Exalted during the year. Enter his email address if one is available. No Exaltation may be authorized unless the member's Lodge membership is verified, provide the appropriate information. Enter the date each Degree was conferred.

Enter the total of Exaltations at the bottom of the page and on Line 2 of Page 11.

PAGE 4: ADMISSION (AFFILIATION) BY DIMIT OR CERTIFICATE (DUAL MEMBERSHIP). Enter the full legal name, date of birth, address, city, state, zip, phone number of each member who has gained membership in your Chapter during the current year. Admission includes those admitted by Certificate of Good Standing from another Chapter by for those seeking to rejoin via a legal Dimit presented to the body for action. Enter all information requested so we can update our membership database. Obviously, you may not admit anyone unless you can validate their prerequisite membership in the Lodge.

Enter the total of Admissions at the bottom of the page and on Line 3 of Page 11.

PAGE 5: REINSTATEMENTS: Enter the full legal name, date of birth, address, city, state, zip, phone number of each member who has gained membership in your Chapter during the current year through Reinstatement. Enter all information requested so we can update our membership database. Obviously, you may not reinstate anyone unless you can validate their prerequisite membership in the Lodge.

Enter the total of Reinstatements at the bottom of the page and on Line 4 of Page 11.

PAGE 6: DIMITS: Note: A member may not just quit. They may leave the organization only by death, dimit, suspension by a prerequisite organization (Lodge), suspension for non-payment of dues in the Chapter, or expulsion.

Enter the full legal name, date Dimit was issued, indicate whether or not the dimit was issued for the purpose of a Transfer, and if for Transfer, identify the name and state of the Chapter transferred to, of each member who has requested and been granted a Dimit for the purposes of terminating their membership or for transfer to another Chapter.

A Dimit may only be issued if the member was in good standing (dues paid in full for the current year) and said request was submitted in writing from the member. Dimits do not have to be voted on and approved by the Chapter, they are issued immediately upon request only if their dues are current.

Transfers by Dimit should only be issued once you have been notified by the gaining Chapter that the Companion has been duly elected to membership. Then you issue the Dimit to the Companion.

For a Companion who is only transferring his membership, if you issue a Dimit before you receive notice of his election to another Chapter, the member is actually without membership until that election. This could cause a member to lose valuable time towards Veteran Membership.

Enter the total of Dimissions at the bottom of this section and on Line 7 of Page 11.

PAGE 6: SUSPENSION FOR UN-MASONIC CONDUCT: Enter the full legal name and date action was taken by the Chapter. If Suspension was in a prerequisite body, then that Companion would only be suspended (Page 7, top section) by the Chapter for failure to maintain membership in those prerequisite organizations, not reported here.

Enter the total of Suspensions for Un-Masonic Conduct at the bottom of this section and on Line 8 of Page 11.

PAGE 6: EXPELLED BY LODGE OR CHAPTER: Enter the full legal name and date action was taken. The date the expulsion was effective is the date effective in all organizations.

Enter the total of Expulsions at the bottom of this section and on Line 9 of Page 11.

PAGE 7: SUSPENSIONS BY LODGE: Enter the full legal name and date Suspension was issued by the Companion's Lodge and the date. The date of Suspension is the actual date of suspension by the Lodge. This suspension is automatic and does not have to be voted on by the Chapter. Do not list in this section those Suspended by the Chapter for Non-Payment of Dues.

Enter the total of Suspensions by Lodge at the bottom of this section and on Line 10 of Page 11.

PAGE 7: SUSPENSIONS BY CHAPTER FOR NON-PAYMENT OF DUES: Enter the full legal name and date Suspension was acted upon by the Chapter. These suspensions do not include those Companions suspended in another body for non-payment of dues, those would be reported in the above section. Suspensions by Chapter for Non-Payment of Dues can only be approved by vote of the Chapter. We do not suspend Companions that have 50-years of membership or very close thereto.

No suspension for non-payment of dues should be initiated unless and until the Chapter has had direct contact with the Companion, his family, or have reasonable knowledge that he is not going to pay his dues. No suspension shall be issued unless and until you have notified the member of their pending suspension and given them a reasonable time to respond.

Enter the total of Suspension by Chapter for Non-Payment of Dues at the bottom of this section and on Line 11 of Page 11.

PAGE 8: DEATHS: Enter the full legal name and date of death. If member was a Past High Priest, select Yes. Dates must include day, month, and year. If you are unsure, contact the Companion's Lodge Secretary or the Grand Lodge for this information.

Enter the total of Deaths at the bottom of the page and on Line 12 of Page 11.

PAGE 9: REMISSIONS FOR INABILITY TO PAY: Enter the full legal name and date of remission. You may not remit a Companion's dues in any year except the year being reported. Remissions must be voted on by the Chapter. Chapters need to have good contact with the Companion or family to validate the need for remission. Do not enter 50-Year Remissions here.

Enter the total of Remissions at the bottom of the page, in the first blank of Line 19 on Page 11.

PAGE 10: REMISSIONS FOR 50-YEAR MEMBERS: Enter the full legal name and date of remission. You may not remit a Companion's dues in any year except the year being reported. Remissions for 50-year members need NOT be voted on by the Chapter. You may not count a 50-Year Remission for one who is also a Grand Chapter Endowed Member.

Enter the total of Remissions for 50-year members at the bottom of the page, in the first blank of Line 20 on Page 11.

PAGE 11: RECAPITULATION:

Line 1: This number provided to you by the Grand Chapter may not be altered. This is the number you will start with in calculating your membership returns. If there is an error in this number, it is because the Chapter has failed to add or subtract membership on previous annual returns. You may correct it by finding out who is not accurately recorded in your membership records and reporting them on this return.

Line 2: From Page 3.

Line 3: From Page 4.

Line 4: From Page 5.

Line 5: Add Lines 2, 3 & 4 together and record.

Line 6: Add Lines 1 and 5 together and record.

Line 7: From first section of Page 6.

Line 8: From middle section of Page 6.

Line 9: From bottom section of Page 6.

Line 10: From top section of Page 7.

Line 11: From bottom section of Page 7.

Line 12: From bottom of Page 8.

Line 13: Add Lines 7, 8, 9, 10, 11 & 12 together and record.

Line 14: Subtract Line 13 from Line 6 and record.

Line 15: In the first blank, enter the number of Exaltations found either on Line 2 or page 3. Multiply this number by \$10.00 and enter the total.

Line 16: In the first blank, enter the current membership number from Line 14. Multiply this number by \$19.60 and enter the total. \$19.60 represents \$17.50 Grand Chapter per capita, \$2.00 General Grand Chapter per capita, and \$0.10 for Leadership Training.

Line 17: If an entry is made here by the Grand Secretary, it shall be paid with this return. This represents a balance due from previous annual returns.

Line 18: Add Lines 15, 16 & 17 together and record.

Line 19: In the first blank, enter the total number of remissions as recorded on Page 9. Multiply this number by \$19.60 and enter the total. You are not required to pay Grand Chapter of Missouri per capita on remitted members. Here is where you apply for that credit.

Line 20: In the first blank, enter the total number of 50-year member remissions as recorded on Page 10. Multiply this number by \$19.60 and enter the total. You are not required to pay Grand Chapter of Missouri per capita on 50-year members. Here is where you apply for that credit.

Line 21: In the first blank, enter the total number of living endowed members of your Chapter. Multiply this number by \$19.60 and enter the total. You are not required to pay Grand Chapter of Missouri per capita on living endowed members. Here is where you apply for that credit.

Line 22: In the first blank, enter the total number of living Perpetual Members of the General Grand Chapter **WHO ARE NOT ALSO GRAND CHAPTER OF MISSOURI ENDOWED MEMBERS – YOU MAY NOT DOUBLE DIP**. Multiply this number by \$2.00 and enter the total. You are not required to pay General Grand Chapter per capita on living perpetual members. Here is where you apply for that credit.

Line 23: If an entry is made here by the Grand Secretary, it represents a credit you have on file from previous annual returns.

Line 24: Adds Lines 19, 20, 21, 22 & 23 together and enter the total Grand Chapter credits for this return.

Line 25: Subtract Line 24 from Line 18 and enter the total. Make check payable to GRAND CHAPTER OF MISSOURI for this amount and return with your completed return to the Grand Secretary no later than March 1.

PAGE 12: DUAL/PLURAL MEMBERS: Enter the full legal name of all Companions who hold dual/plural membership in your Chapter, meaning your Chapter is NOT their home Chapter. Identify the name and number, city, and state of the Chapter where the member's primary membership is located. Enter the date affiliated with your Chapter.

PAGE 13: FINANCIAL REPORT: Complete all information requested. Total of receipts should match in the Balance Statement on this page, likewise for total of expenditures. Under the Balance Statement, Line 1 should be the same as Line 5 from your previous annual return.

PAGE 14: REPORT OF AUDIT COMMITTEE: This report is required in accordance with the By-Laws of the Grand Chapter of Missouri, it is not something the Grand Secretary does just to irritate you. The Committee should select the appropriate check boxes, no box groups shall be skipped. It shall be signed by the Audit Committee appointed by the High Priest. It shall also be signed by the Retiring High Priest, Incoming High Priest, Secretary, and dated. If the officer year is different from the fiscal year, the Incoming High Priest and Retiring High Priest shall be signed by the same High Priest.

PAGE 14: SEAL: Many Chapters forget to seal their return. This is the Grand Chapter's proof that you are in possession of Grand Chapter property, your seal. Please apply, affix, and emboss the seal of your Chapter in the appropriate location at the bottom of this page.