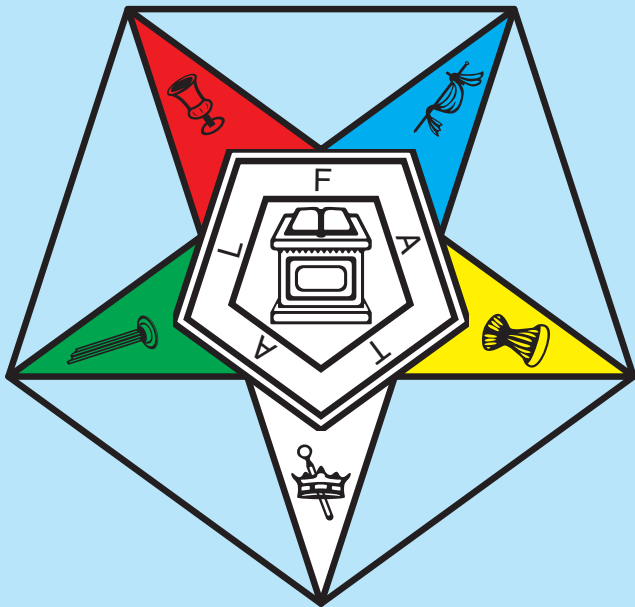
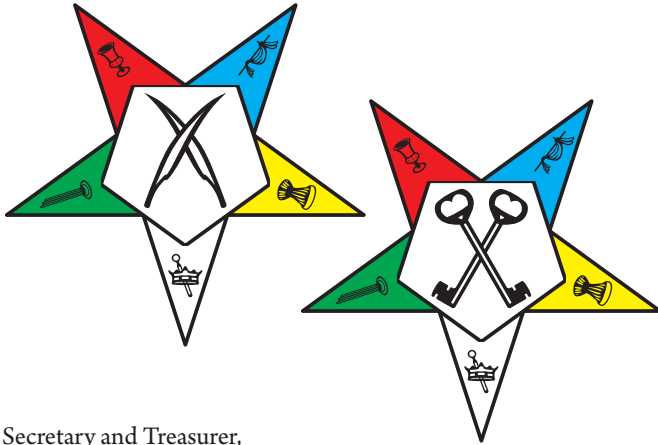


**SECRETARY**  
**AND**  
**TREASURER**  
**HANDBOOK**





# 2009 SECRETARY AND TREASURER HANDBOOK



Dear Secretary and Treasurer,

The Secretary and Treasurer Handbook has been prepared to assist you in the performance of your important duties as Secretary or as Treasurer of your Chapter. Two copies of the book are being provided to each Chapter for your use. The books are to be passed to your successors at the end of your term. Additional copies may be purchased through the Grand Chapter office. The book must be kept up-to-date as new pages are provided.

If there is ever a question as to the proper procedure, please do not hesitate to contact the Grand Chapter Office for assistance.

16960 Bastanchury Road, Suite E  
Yorba Linda, CA 92886-1711  
(714) 986-2380  
FAX (714) 986-2385  
Email: [gsecretary@oesca.org](mailto:gsecretary@oesca.org)

## DUTIES OF OFFICERS

Sec. 162. **SECRETARY.** The Secretary shall:

(also see Uniform Code, Article III, Sec. 2; IB page 11)

- (1) Record the proceedings of the Chapter;
- (2) Receive all moneys due the Chapter and pay the same over to the Treasurer, taking a receipt therefor;
- (3) Keep a correct account between the Chapter and its members;
- (4) Report monthly to the Grand Secretary the transactions of the Chapter as required by the Constitution and Laws of the Grand Chapter;
- (5) Keep a current register of all members of the Chapter, paying particular attention to changes of address, both in California and other jurisdictions. When a change of address outside of the area of the Chapter is noted this information shall be sent in a timely manner to the Chapter Secretary in the area of relocation, by the Secretary or a member designated by the Secretary;
- (6) Keep the seal of the Chapter and impress it on all receipts, communications, certificates and documents of the Chapter on execution thereof;
- (7) Prepare, or cause to be prepared and sent, all notices and other communications required by the bylaws or the Worthy Matron;
- (8) Have present at each meeting the current minute book, Constitution and Laws of the Grand Chapter and the bylaws of the Chapter, and such other equipment as required;
- (9) Read all communications pertaining to the Chapter or the Order, promptly, report all others and read such as are requested;
- (10) Require all bills and accounts against the Chapter to be in itemized form and submit the same to the Auditing Committee for its examination and action;
- (11) Report promptly to the Grand Secretary any special election of Officers, together with their membership numbers and addresses, and any changes of address, resignation or death of any elected officer;
- (12) By November 1 of each calendar year transmit to the Grand Secretary, on a form provided, the membership numbers, names and addresses of all officers;
- (13) Notify the Grand Secretary of the death of any present or Past Grand Officer belonging to the Chapter, together with date and time and place of funeral, if possible;
- (14) Perform all other duties required by the bylaws and pertaining to the office.

In keeping the records and otherwise performing the duties of the office, shall acquire from the Grand Chapter Office and shall use books, forms and other supplies as provided by the Constitution and Laws of the Grand Chapter. (Sec. 253)

Sec. 162A. **TREASURER.** The Treasurer shall:

(also see Uniform Code, Article III, Sec. 3; IB page 12)

(1) Issue all checks, which are to be signed by any two of the three following officers: Worthy Matron, Secretary or Treasurer;

(2) Keep for seven years all bills and canceled checks or vouchers;

(3) Receive all monies from the Secretary, promptly deposit the same in the name of the Chapter in such bank or banks as may be designated by it and shall keep a just and accurate account thereof;

(4) Submit (either quarterly, semi-annually, or annually as the Chapter may elect) a report of the monetary transactions of the Chapter.

All disbursements of Chapter funds shall be paid by check ordered by the Chapter.

Perform all other duties required by the bylaws and pertaining to the office.

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**Reference:**

- **“Sec.” Refers to Section of the Constitution and Laws;**
- **“IB” refers to Instruction Book;**
- **“UCB” refers to Uniform Code of Bylaws**

**ABSENCE OF SECRETARY OR TREASURER**

(Sec. 158 (5))

When either officer is absent from a meeting, the Worthy Matron appoints a pro tem officer to fill the station for that meeting.

The Secretary pro tem will take the minutes, receive the money and pay it over to the Treasurer. The pro tem secretary signs the minutes.

The Treasurer pro tem would not perform the banking duties. However, if the Treasurer will be absent for several meetings, arrangements may be made for a member to receive the money from the Secretary, give a receipt and make deposits. This could be the Worthy Matron.

If checks need to be drawn in the Treasurer’s absence, the checks for the rent and the standard expenses may be made out, signed by the Treasurer and given to the Secretary. When the chapter votes to pay the expense, the Secretary (or the Worthy Matron) would countersign and mail the check.

If one of the officers will be absent for an extended period of time, special arrangements should be made to fulfill either officer’s duties. Neither the Secretary, Treasurer, nor Worthy Matron should ever sign blank checks to leave with the other officer. This is just like leaving a book of cash, as the bank does not always check if there are two signatures on a check. A pro tem officer may not sign checks. Only the installed Worthy Matron, Secretary and Treasurer are authorized to sign checks (Sec. 173).

**ACKNOWLEDGEMENTS**

Donations received are listed and read as Receipts of the meeting. Unless your chapter requests names and dollar amounts for each individual donation, you may read either the total of the donations and members who make up that total with no individual dollar amount read OR read the various amounts and not the names of the members making the donations so as not to embarrass any member.

Donations received from members must be acknowledged in writing by the Secretary to the person (or group) making the donation. Acknowledgement of the donation must also be sent to the person (or group) that the donation was made in “honor of” or to the family if in “memory of.” The following Acknowledgement cards are available through the Grand Chapter office without charge (order from the Order Form/Price List, bottom section on the back of the form):

- Thank you for your donation to the California Eastern Star Foundation, Grand Chapter Endowment Fund, or Eastern Star Homes of California and state the dollar amount donated. (Tax deductible)
- Thank you for your Star-Plus donation. (Tax deductible)
- Thank you for your donation. (Not tax deductible)
- A donation was made in honor of . . .
- A donation was made in memory of . . .

Donations by an individual in the amount of \$250 or more must be paid directly to one of the following: California Eastern Star Foundation, Eastern Star Homes of California, Grand Chapter Endowment Fund, or Grand Chapter of California. This donation is sent directly to the Grand Chapter office by the Secretary or member and will be acknowledged by the Grand Chapter office.

Donations to the California Eastern Star Foundation must specify, on the memo line, to which fund the donation is being made. If a donation for Cancer does not specify the cancer fund to which the donation is being made, it will be divided equally among the J. Clifford Lee Memorial Cancer Fund, the Eastern Star Patient Comfort Program Fund, and the Cancer Research Fund. (Sec. 91B)

Donations to the Grand Chapter Endowment Fund must specify whether the donation is to be restricted or unrestricted within this Fund. If not indicated, the donation will be unrestricted and the principal will be available for the operation of the Home. (Sec. 75 d (1), (2))

Chapter donations to any fraternal organization, other than youth groups, or to any Fraternal Hall Association for any purpose require a Special Dispensation. Donations to the Masonic Youth Groups require a Special Dispensation for donations in amounts greater than \$500 annually. Donations to all other youth groups require a Special Dispensation for donations in amounts greater than \$200 annually. (Sec. 205, 206)

## **ADDRESS CHANGE FORM**

List any changes of address for your members on the Address Change form, and send it to the Grand Chapter office with your monthly reports.

## **ADMISSION TO THE EASTERN STAR HOME**

(Sec. 458)

See Eastern Star Home

## **AFFILIATION**

(Sec. 197(2), 198, 199, 202, 226, IB 53, 75–80)

Petitions for Affiliation may be received only at a Stated Meeting (Sec. 203). Anteroom meetings are Stated Meetings. The petition must be accompanied by the proper fees (Sec. 126(d)), which may not be less than \$2.50 nor more than one-half of the initiation fee. A Certificate of Good Standing (Sec. 235), a Certificate of Reinstatement or Restoration (Sec. 250), or a Demit (Sec. 235) must also accompany the petition. The affiliation fee for your chapter is in your chapter's Bylaws.

Each application for initiation and each application for affiliation accompanied by a Demit or a Certificate of Good Standing from a chapter in a jurisdiction other than California shall include a contribution of \$15.00 for the benefit of the Grand Chapter Endowment Fund. Each application for affiliation accompanied by a Demit or a Certificate of Good Standing from a chapter in this jurisdiction shall include a contribution of \$10.00 for the benefit of the Grand Chapter Endowment Fund. Each applicant for affiliation, who has never before been a member in the chapter with which she/he is currently affiliating, shall include with the application a contribution of \$5.00 for the use and benefit of the International Eastern Star Headquarters in Washington, DC.

Petitioners for affiliation who were last members in either New York or New Jersey must provide certification of a Masonic relationship allowed in California in order to affiliate. (Sec. 202 (3))

If the petitioner is elected and signs the bylaws prior to June 30<sup>th</sup> and does not pay \$50.00 to become a Life Sponsor of the Eastern Star Home, then \$5.00 is also collected. If the bylaws are signed after June 30<sup>th</sup>, the \$5.00 is not collected.

The above contributions will be calculated as of June 30<sup>th</sup> and billed to the chapter on the Per Capita Bill by the Grand Chapter each year.

If a Certificate of Good Standing (or a letter of good standing) accompanies the petition, it must have been issued within the previous six months (Sec. 202 (5)).

A Demit, Certificate of Reinstatement, or Certificate of Restoration may bear any date and may have been issued by a chapter no longer in existence. If dated more than six months prior to the time of the petition and if a sum of six-months dues has not already been paid and endorsed on the form within the last six months, then a sum equal to six-months dues of your chapter must be paid to your chapter (Sec. 202 (6)).

Send Notice of Election by Affiliation to the candidate informing them of the affiliation date.

See Candidates

See Demit

See Dual Membership

See Plural Members

See Rejection

Ceremony of Affiliation — IB 75

## **AMENDMENTS TO C&L AND IB**

(Sec. 111 (17), 113–115)

See Resolutions

## **ANNUAL FINANCIAL REPORT**

In August, the Chapter Annual Financial Report form will be mailed to your chapter. This form will have your chapter's financial information for the previous year pre-printed. You will need to provide the information for October 1<sup>st</sup> of the previous year through September 30<sup>th</sup> of the current year. This report will be due in the Grand Chapter office no later than November 1<sup>st</sup> of that year.

Failure to provide this information will result in your chapter being excluded from the Grand Chapter filing to the Internal Revenue Service. This means your chapter must file the form 990 on your own.

## **ANNUAL REPORT TO CHAPTER**

(Sec. 182, 251; UCB Article III Sec. 4)

See Reports to Chapter

## **ANNUAL REPORT TO GRAND CHAPTER**

See Reports to Grand Chapter

## **ANTEROOM MEETINGS**

(Sec. 150) (IB 8)

An anteroom meeting is a stated meeting. Only four anteroom meetings may be held in any one year and are considered short form. The meeting must be opened at the time specified in the bylaws. The Bible must be opened and the prayer given. The meeting must be closed in Ritualistic form. The receiving of petitions and all other routine business may be conducted.

An anteroom meeting before an installation is the last stated meeting prior to installation.

## **APPLICATIONS FOR ASSISTANCE**

The following applications are requested from the Grand Chapter office. Check the Constitution and Laws for the requirements.

### **Benevolent Fund:** (Sec. 400–410)

An application should be filled out, signed by the applicant and send directly to the Area Chairman on the Benevolent Committee assigned to your District; OR, if the Chapter's Relief Committee is of the opinion that an application for relief of a needy member in good standing of the Chapter should be made, the committee may apply to their Area Chairman. All applications that come through the Chapter must have the Chapter seal on the form provided by the Grand Chapter (Sec. 402). Names and addresses of Area Chairmen are listed in the Roster.

Application can also be made through StarCARE, which will send the application to the Benevolent Committee.

**Cancer Assistance:** (Sec. 89C)

One copy of the Application for Cancer Assistance, signed by the applicant, shall be made through the Worthy Matron or in her absence, the Secretary of the chapter in which membership is held and sent to the Area Chairman on the Cancer Assistance Committee assigned to your District. The Area Chairman sends the application to the Chairman of the Cancer Assistance Committee. The Chairman decides which cancer fund will be used.

**J. Clifford Lee Memorial Cancer Fund:** (Sec. 89A)

**Marguerite Rennie Memorial Fund:** (Sec. 89B)

To obtain items from the Eastern Star Patient Comfort Program, contact the Chairman of the Eastern Star Patient Comfort Program (Sec. 91). The names and locations of the stations may be obtained from the state Chairman, whose name and address is listed in the Roster.

**Scholarships:** (Sec. 88)

Applications for Educational and Religious Scholarships are obtained from the Grand Chapter office or from California Eastern Star's Website, [www.oescal.org](http://www.oescal.org), and one is sent to the Secretary in a monthly mailing. Copies may be made as needed. The deadline for submission of applications is determined by the Committee. Specific instructions are with the application.

See also StarCARE

**ASSESSMENTS**

(Sec. 6(2); 98; 466)

Members must pay any assessment, which was approved by the delegates at Grand Chapter Session, when they pay their dues. Members exempt from paying dues (Sec. 98) are also exempt from paying assessments. Members who hold Life Sponsorships in the Home are exempt from paying the Home assessment. Plural members who have purchased Life Sponsorship are exempt from paying the assessment in both chapters in which they hold membership. Paid Life Members are not absolved from the obligation to pay Grand Chapter assessments. (Sec. 193)

Money collected for assessments is sent to the Grand Chapter office with the Per Capita Bill, which is calculated as of June 30<sup>th</sup> (Sec. 96). Thus, you would charge your new members the current Home Assessment prior to June 30<sup>th</sup> and not charge them after June 30<sup>th</sup> as the chapter is billed per capita based on your membership as of June 30<sup>th</sup>.

Assessments may be provided for in a chapter's bylaws (Sec. 126(e)).

**Home Assessments:**

- \$0.25 in 1934–1937, 1939, 1940–1942
- \$0.35 in 1943, 1944
- \$1.00 in 1931–1933, 1957, 1960–1975
- \$2.00 in 1976–1992
- \$3.00 in 1993–2007
- \$5.00 in 2008–2009

**ATTENDANCE AT MEETINGS**

(Sec. 258)

No person who is not a member shall be permitted to remain in the anteroom while the Chapter is in session. No child two years of age or over shall be permitted in the Chapter Room during the session of the Chapter.

**AUDIT AND AUDITING COMMITTEE**

(Sec. 167; 182, 251; UCB Article VI Sec. 1(b))

At installation, the Worthy Matron appoints an Auditing Committee at installation of three or more members. They shall examine and pass upon all bills and claims of the chapter before they are paid. If any member of this committee is not present at a meeting, the Worthy Matron will appoint another chapter member to examine the bills. Members of this Committee may not be the spouse, parent, or child of the Worthy Matron, Worthy Patron, Secretary, or Treasurer.

The Committee examines the books of the Secretary and Treasurer annually after the end of the fiscal year (September 30<sup>th</sup>), and reports on their condition to the chapter at the first stated meeting of the chapter held after December 1<sup>st</sup> (Sec. 251). However, a special audit of any financial records of the chapter may be made at anytime if ordered by the Chapter (Sec. 182).

While there are no specific guidelines in the Constitution and Laws or the Instruction Book of Grand Chapter, the following procedure will be used.

Records to be assembled for the audit:

- Minute Book
- Yellow Cash Ledger Pages or Financial Spreadsheet
- White Membership Ledger Pages
- Dues Receipt Stubs
- Audited bills
- Check Book Stubs
- Treasurer's Cash Book
- Treasurer's Receipt Book Stubs
- Bank Statements
- Cancelled Checks

**Audit Procedure:**

An audit should start with the Secretary's Minute Book, which is compared to the Yellow Cash Ledger Pages or financial ledger. All receipts and disbursements shown in the Minute Book must appear on the financial ledger, and no entries may be on the financial ledger that are not in the Minute Book.

Any dues and assessments shown in the Minute Book as having been paid must be noted on each member's White Membership Ledger Page and on the dues receipt stubs. There must be a dues receipt stub for every dues payment shown the Minute Book. There must be a payment of dues shown in the Minute Book for every dues receipt stub, except for 50-year life members, paid life members, members whose dues were remitted, and members who are exempt from paying dues. These will have a dues receipt and a receipt stub, but will not be listed in the minutes.

When the Secretary gives money to the Treasurer, the Treasurer makes out a receipt and gives it to the Secretary. This receipt, and the stub in the Treasurer's receipt book, must correspond to the receipts listed in the Minute Book. However, when interest is received, it will be recorded in the Minute Book, but will not appear on any receipt.



The audited bills and check stubs (or cancelled checks) are to be compared to the financial ledger and Minute Book. For every bill there should be a check stub and these should be compared to confirm that the amounts are the same. For every check stub, there must have been approval in the minutes; likewise every bill should appear in the Minute Book.

Each check must be listed in the Treasurer's Cash Book, and the amounts listed on the each receipt, which was issued by the Treasurer to the Secretary, must also be listed. The bank statements and cancelled checks are to be compared with the Treasurer's Cash Book, the check-book, the Minute Book, and the financial ledger.

At the conclusion of an audit, the committee shall date and sign all of the books they have examined. A written report must be compiled and given to the Secretary. It is suggested that the report also be given to the current Worthy Matron and the Junior Past Matron. This report is to be presented to the membership at the first stated meeting after December 1<sup>st</sup>.

As part of the audit procedure, the committee should confirm the following:

- that each member is either exempt from paying dues, has paid their dues, or has had their dues remitted
- that all funds received by the chapter have been properly deposited into the correct accounts
- that all checks issued were in the proper amounts and were approved by the chapter
- that each check is accounted for
- that the records of the chapter are being properly preserved

The books of the Secretary and Treasurer are their responsibility, and they therefore should not be audited without the two officers present. The officers should not take part in the audit but be available to answer any questions regarding their books.

### **BALLOT, SECRET OR WRITTEN**

Unless provided for in the chapter's bylaws or standing rules, written or secret ballot can only be authorized by a majority vote of the Chapter. (Robert's Rules of Order, Voting Procedure)

See Tellers

## **BALLOTING**

(Sec. 218–221, IB 52–59, Ritual 13–15)

Balloting is the procedure to use when voting on petitions, Honorary Memberships, and certain Requests for Special Dispensation, when only a fixed number of negative votes is required to reject or defeat.

The Secretary marches west on the Marching Line and east on the Side Line. The Treasurer marches west on the Side Line and east on the Marching line.

The Chapter may not ballot on more than five petitioners at one time, but may hold more than one ballot per meeting (Sec. 220).

Rejection of a petition takes three or more black cubes. (Sec. 221) If three cubes are cast in a ballot, the Worthy Matron must cause a new ballot to be taken. If a collective ballot receives three or more black cubes, a new ballot shall be taken on each petitioner individually, and if any of those individual ballots receives three or more black cubes a second ballot shall be taken on that individual. If three cubes appear for a second time on an individual, then the petition is rejected. See Rejection of a Petition for further instructions.

The ballot is “clear” with one or two black cubes — not “cloudy.”

A Ballot box must be used for balloting. A properly prepared ballot box contains at least six black cubes and a sufficient number of white balls to supply the members voting. If there are more than sixty white balls there needs to be at least one black cube for every ten balls. (Sec. 219)

See procedure Sec. 222, 223, IB 52

## **BANK ACCOUNTS**

(Sec. 172)

The Treasurer shall deposit funds received from the Secretary, in the name of the chapter, in any bank, credit union, or savings and loan. Such depository must meet the insurance requirements as stated in Section 101.

Authorized signers are only the installed Worthy Matron, Secretary, and Treasurer.

## **BANK STATEMENTS**

(Sec. 162 A, UCB Article III Sec. 3(b))

The Secretary will receive the bank statement from the bank, review the statement, and compare it to the financial report or Yellow Cash Sheet. The statement, together with the cancelled checks, is then given in a timely manner to the Treasurer who will reconcile the checkbook. The Treasurer keeps the cancelled checks and statements for seven years. Some banks are no longer returning checks and we recognize that this is in conflict with the Constitution.

## **BENEVOLENT FUND**

(Sec. 400–410)

See Applications for Assistance

## **BILLS**

(Sec. 162(10), 162A, 167; IB 25; UCB Article III Sec. 2(j))

All bills must be itemized, preferably bills should be those issued by the vendors. Bills must be properly audited by the Audit Committee before being read, and then voted upon before being ordered paid, even if the money is allocated in the adopted budget for the year.

Bills are read twice — when received and, for the second time, in the Minutes of the meeting received. You may not read only the total of the bills. You must read each individual bill in the meeting and in the minutes at the next meeting. You should have an audited bill or a motion made for every check written, except assistance by the Relief Committee (Sec. 170, 173) and the per capita (Sec. 173). The Treasurer shall write all checks. The checks are signed by any two of the three following installed officers: Worthy Matron, Secretary or Treasurer. The Secretary should receive the Bank Statement from the bank, review it, and give it to the Treasurer to balance the checking account.

The Summary of Bills, or a like form, may be used to list all bills including bills approved by motion during the meeting. This form could be in duplicate: one copy for the Secretary to have to write the minutes and one copy to give the Treasurer with the bills to issue the requested checks. The Treasurer would note the check numbers on the form and return to the Secretary. The Treasurer keeps the bills for seven years.

Checks needed for any of the categories on the Check Transmittal Form would be listed on the Summary of Bills form indicating the proper payee. Remember, the Treasurer only needs to issue one check per category on the Check Transmittal Form.

All disbursements must be posted on the ledger (accounting program, computer spreadsheet, or the yellow cash page).

The Treasurer records each receipt for money received from the Secretary in the Treasurer's Cash Book. All disbursements are to be recorded in the Treasurer's Cash Book.

The audited bills should be kept for seven years, along with the bank statements and the cancelled checks.

See Checks, Check Transmittal Form

See Official Visit, Expenses

## **BOOKS AND PAMPHLETS**

The following are available through the Grand Chapter office:

- California Eastern Star Foundation
- New Member Booklet
- Questions and Answers on the Constitution and Laws
- Prospective Member Brochure

The following pamphlets and others are available through the Senior Living Community:

- Outreach Program
- Planned Giving Brochure

## **BOOKS OF THE CHAPTER**

(Sec. 165; IB 11)

Any books, records or other property of the chapter shall be made available by any officer having the possession or control of them, and that officer will assist in any matter relating to the affairs of the chapter.

## **BUDGET AND BUDGET COMMITTEE**

(Sec. 126(h); 168; UCB Article VI Sec. 1(c))

The duty of the Budget Committee is to prepare a budget of income and expenditures for the fiscal year, October 1<sup>st</sup> through September 30<sup>th</sup>. The Chapter will vote to approve the budget at the last meeting prior to the end of the Chapter fiscal year.

The Secretary and Treasurer should be asked to provide the past year's financial information to the Budget Committee to assist in the preparation of the budget for the next year. The Budget Committee should review the actual dues received in the prior year and compare it to the amount that had been budgeted. If there is a major discrepancy, it should be reported to the Worthy Matron.

The total of the budget may not be exceeded except by majority vote of the members present and voting. Even though an item is in the budget, an audited bill must be presented before it can be ordered paid. If the chapter votes to release the budgeted amount before a purchase, then a receipt would be given to the Secretary later, along with any money not spent. The budget is just a guideline. Although an item is in the budget, it cannot be spent without the vote of the Chapter.

A copy of the approved Budget must be attached to the minutes.

See Use of Funds Sec. 172, 174, 175.

## **BULLETINS**

(Sec. 212)

Petitioner's name shall not be published in any chapter bulletin or otherwise, prior to initiation or affiliation. Members planning to submit their name for an elective office, either for the Annual Election of Officers or for a Special Election, shall not be published in the bulletin.

## **BYLAWS**

(Sec. 126)

Every chapter is required to adopt a code of bylaws. See Section 126 for what shall be provided for in the bylaws and what may not be provided for in the bylaws.

Annual dues are provided for in the bylaws; assessments may or may not be provided for.

Standing Rules are not part of the chapter's bylaws and may be changed by a majority vote after notice is give. If no notice is given, a two-thirds majority vote is required. (Robert's Rules of Order Newly Revised, 10th Edition, §35, pp. 293–299)

## **BYLAWS, AMENDMENTS TO**

(Sec. 126–128; UCB Article VII Sec. 1)

An amendment to the chapter’s bylaws must be presented in writing at a stated meeting and is read. The following is an example of how this may be handled:

Member: “I give notice that at the next stated meeting I will bring a motion to amend the bylaws as follows: . . . .”

Worthy Matron: “Sister Secretary, you will see that the proper notice is sent to all members that at the next stated meeting this proposed change to the bylaws will be considered.” <Gavel>

At a succeeding stated meeting, after notice of such amendment and of its consideration is sent to all members (Sec. 146), the amendment may be discussed and voted upon.

Member A: “I move that the bylaws be amended as follows: . . . .”

Member B: “Second.”

Worthy Matron: “It has been moved and seconded that the bylaws be amended as follows: . . . . Is there any discussion?”

If adopted by a vote of  $\frac{2}{3}$  of the members present and voting, two copies of the new amendment, one copy of the section before it was amended, and two copies of the “Approval of Amendments to Bylaws” form, obtained from the Grand Chapter office at no charge, are sent to the Grand Chapter office.

The bylaw change becomes effective when the approval, which has been signed by the Worthy Grand Matron, is read at the stated meeting following its receipt. The Secretary shall inform all members of the change in bylaws and enter the change in the chapter’s Bylaws Book.

See Voting

See Appendix D

See Consolidation

## **BYLAWS BOOK**

(Sec. 126; 127, 227; IB 72, 79)

The bylaws of a chapter shall be kept current in a Bylaws Book purchased from the Grand Chapter office. The book shall be signed by new members and a copy of the current bylaws shall be given to each new member. If a member demits from your chapter and then affiliates with your chapter again at a later date, they would sign the bylaws again.

Members reinstated after a suspension, for any reason, do not re-sign the bylaws book.

Honorary Members (Sec. 183) do not sign the Bylaws Book. Your chapter may have a special roll of Honorary Members Book that they may sign.

Under “Remarks” in the Bylaws Book, the Secretary should note name changes, when that member was demitted, suspended, resigned or died.

Amendments or changes to the Uniform Code of Bylaws automatically become part of the bylaws of the subordinate chapter. These changes are not voted on by the chapter members. The Secretary shall note such changes in the chapter’s Bylaws Book (Sec. 126).

At an initiation, if a member needs reading glasses to sign the bylaws, then they should be left at the Secretary’s desk to be available when needed.

See Failure to Sign the Bylaws Sec. 227

## **CALIFORNIA MASONIC CODE (C.M.C.)**

(Sec. 179)

See Commercialism

## **CAL STAR NEWS**

This is a quarterly publication sponsored by the California Grand Line Officers Association. The current subscription rate is \$5.00 for one year. This Committee is listed under Special Committees in the State Roster.

## **CANCER RESEARCH**

(Sec. 91A)

Cancer Research is under the umbrella of the California Eastern Star Foundation.

## CANDIDATES

**Initiation:** (Sec. 197, 201, 224, IB 58) When advising a candidate of election and the date to appear for initiation you may use a “Notice of Election for Initiation” form. Advise the amount of dues required for the balance of the calendar year, which should be pro-rated, and also include information as to the amount due annually. If the candidate is joining your chapter after June 30<sup>th</sup>, she/he does not have to pay the current year’s Home Assessment. (See Assessments)

When a new member signs the chapter’s Bylaws Book, the Secretary shall present the new member with a current copy of the chapter’s Bylaws. It would also be a good idea to give the new member a copy of the New Member Booklet (obtain from the Grand Chapter office) and, if available, a roster of the chapter members.

**Affiliation:** (Sec. 202, 206, IB 58) When advising a candidate of election and the date to appear for the affiliation ceremony or to sign the bylaws, use a Notice of Election for Affiliation form. Advise the amount of dues required for the balance of the calendar year, which is to be pro-rated, and also include information as to the amount due annually. If the affiliate is joining your chapter after June 30<sup>th</sup> she/he does not pay the current year’s Home Assessment. Even if a plural member, a Life Sponsor of the Eastern Star Home will not pay the Home Assessment in any California chapter.

If affiliating on a Demit, the affiliate shall not sign the bylaws of your chapter until you have obtained the Demit from their former chapter. If the Demit is over six months old, six-months back dues in your Chapter must accompany the petition, unless the Demit has been endorsed in the last six months that the member has already paid such dues.

If the affiliate will be a plural member, a Certificate of Good Standing from the other chapter must accompany the Petition for Affiliation (Sec. 235).

Petitioner names **shall not** be published in any chapter bulletin or otherwise, prior to initiation or affiliation (Sec. 212).

**Plural Members:** (Sec. 191) Advise plural members that they must pay dues and assessments in your chapter, unless exempt from the Home Assessment because of the purchase of a Life Sponsorship in the Eastern Star Homes of California. Remind them that they must



continue to pay dues and any assessment owed in the other chapter. The Secretary of a chapter that has elected a member to plural membership must send within 30 days a notice informing the Secretary of the other chapter of the plural membership.

Plural members, who are 50-year members of the Order and have been voted Life Membership in one chapter, must pay dues in the other chapter, unless voted Life Membership in that chapter also.

**Dual Members:** (Sec. 192) Advise dual members that they must pay dues and assessments in your chapter, unless exempt from the Home Assessment because of the purchase of a Life Sponsorship in the Eastern Star Homes of California. Remind them that they must continue to pay dues and any assessment owed in the other chapter. The Secretary of a chapter that has elected a member to dual membership must send within 30 days a notice informing the Secretary of the other chapter of the dual membership.

Dual members must have 50 years in the Order and have been a continuous member in this Jurisdiction for the prior year to be entitled to a 50-year pin and certificate from California. To be eligible for 50-year Life Membership, Dual Members must have been a member of a chapter within the jurisdiction of any Grand Chapter under the General Grand Chapter or under the General Grand Chapter itself for 50 years, and have no less than 25 years in a chapter in California, and have been a member of the chapter voting the 50-year Life Membership for the prior year. (Sec. 193)

## **CASH BOOK**

See Treasurer's Cash Book

## **CERTIFICATES**

The Grand Chapter office has the following certificates available:

- Twenty-five year membership (white with blue ink)
- Fifty-year membership (white with gold ink)
- Seventy-five year membership (white with silver ink)
- Honorary Membership (white)
- International Temple (white)
- 50-Year Life Membership (goldenrod)
- Life Sponsor of the Eastern Star Home (green)
- One hundred-year Birthday (8½" x 11" with border)
- Paid Life Membership (white)
- Proficiency (white business card size)
- Rob Morris Award (8½" x 11")
- Service Award (8½" x 11")

## **CERTIFICATE OF GOOD STANDING**

(Sec. 235)

A Certificate of Good Standing shall be issued by the Secretary upon oral or written request of a member in good standing whose dues and assessments are paid to the end of the preceding month. No action of the Chapter is necessary, but the Secretary shall immediately inform the Worthy Matron of the request.

Other jurisdictions may issue a Letter of Good Standing.

A Certificate (or Letter) of Good Standing must accompany a petition of affiliation for Plural or Dual membership and must be dated within six months (Sec. 202).

## **CERTIFICATE OF RESTORATION**

A Certificate of Restoration is granted when a petition for reinstatement is rejected. The member is restored to the Order, but not reinstated in the chapter petitioned. This is like a Demit and is good for visitation and petitioning for affiliation for a period of six months. After six months, payment of six-months dues to the chapter being petitioned must be endorsed on the Certificate of Restoration in order to allow continued visitation or affiliation.

## **CHAPTER**

Dissolution — see Sec. 295–297

New Chapters — see Sec. 229, 263–278

Suspension — see Sec. 305–309

Under Dispensation — see Sec. 279–288

Under Probation — see Sec. 300–304

## **CHAPTER FUNDS**

(Sec. 166, 172–181)

The primary purpose of chapter funds is for the payment of its operating expenses, the dues and assessments to Grand Chapter, refreshments at its meetings, and social entertainment given by the chapter.

The C&L sections cover the receiving of money by the Secretary, withdrawal of funds, use of funds for charitable purposes, Grand Chapter expenses, gifts, investment of funds, subsidiary organizations, sponsorship of youth, and Life Membership funds.

A special audit of any or all of the financial records of the chapter may be made at any time, if ordered by the chapter (Sec. 182).

No committee shall have the authority to contract any indebtedness, except as specifically authorized by the chapter (Sec. 182).

## **CHAPTER LINES**

(IB 3)

## **CHARTER**

(Sec. 121, 147, IB 1, Ritual 163))

The charter, or a photocopy of the charter, must be present at all meetings. The chapter must vote to allow the charter to be taken to the Official Visit of the Worthy Grand Matron and Worthy Grand Patron.

The original charter may be kept in a safety deposit box.

If your chapter bylaws are changed to meet in a different city, or if you consolidate with another chapter, the charter must be sent to the Grand Chapter office for endorsement.

In the event the charter is lost or destroyed, the Grand Secretary shall issue a duplicate charter at a cost to be determined (Sec. 121).

Probation — see Sec. 300–304

Suspension of — see Sec. 305, 307–310

## **CHECKS**

(Sec. 162A; UCB Article III Sec. 3)

The Treasurer shall write all checks, which are signed by any two of these three installed officers: Worthy Matron, Secretary, or Treasurer.

The **checkbook** is in the possession of the Treasurer. It is the duty of the Treasurer to receive the Bank Statement from the Secretary and to balance the checkbook.

A **Check Transmittal Form** is provided by the Grand Chapter office to use when sending checks to the office. There are four specific ways to make a check payable: California Eastern Star Foundation, Grand Chapter Endowment Fund, Eastern Star Homes of California, and Grand Chapter of California. On the transmittal form are listed various funds under one of the above four categories to define the

payee. Under the California Eastern Star Foundation, be sure to specify to which cancer fund the donation is going. Under Grand Chapter Endowment, be sure to indicate if the donation is to the restricted or unrestricted portion of the Endowment. (Sec. 75 d (1), (2))

Please do not staple, tape, glue, or affix the check to the form in any manner nor cut the form apart. If all the chapters were to do this, it takes hours to separate.

Only one check needs to be written for each of the four specific entities. The only check that cannot be combined is for the payment of the Annual Assessments.

The Check Transmittal Form has spaces for you to indicate that you have sent acknowledgements when required.

See Appendix F

## **CLASSES OF MEMBERSHIP**

(Sec. 183, 184)

Membership in a chapter is either regular or honorary.

Regular membership is by initiation or affiliation.

Honorary membership is given to a member of the Order who is not a member of the chapter. The members of the chapter elect by an oral vote or by ballot to bestow Honorary Membership on a member. The vote must contain less than three negative votes.

see Honorary Membership

## **COMMERCIALISM**

(Sec. 179)

The California Masonic Code (CMC 27700, 27800) defines commercialism in the Order of the Eastern Star. Eastern Star members must remain within the guidelines of Grand Lodge in soliciting advertising.

## **COMMITTEES**

(Sec. 167– 171A, UCB Article VI)

Standing Committees, except Relief, shall report to the Chapter in writing. All written reports shall be filed with the Secretary.

No Committee shall have the authority to contract any indebtedness, except as specifically authorized by the Chapter. (Sec. 182)

Auditing — Sec. 167, see Audit Committee  
Budget — Sec. 168, see Budget Committee  
Courtesy — IB 5  
Investigating — Sec. 210, IB 21, see Investigation on Petitions  
Membership — Sec. 171  
Property — Sec. 169, see Property Committee  
Relief — Sec. 170, see Relief Committee  
Standing & Special — Sec. 171A  
Tenure — Sec. 182

## **COMMUNICATIONS**

(Sec. 162(9), 243; IB 24)

Secretary should stand when reading the communications. (See Standing)

All communications to the chapter should be read in the order of their importance, the Worthy Grand Matron's first, Grand Chapter's second, etc. Take the letters out of the envelopes before Chapter starts. Before reading a letter, announce the name of the writer. Do not read all the notes that come in with the dues, unless it would be of interest to the Chapter. **Summarize long communications.**

Invitations should be read in the order of their importance, giving the chapter, the occasion, the date, time, place and cost of the event. Then announce they are on the Secretary's desk, or web site, for those who are interested. Do not read the details, names and addresses, etc.

Invitations to Grand Officers' Receptions should be read in protocol order. After reading, give the invitation and other material sent with the invitation to the subordinate officer. Do not read invitations to events that have already taken place.

Communications from the Grand Chapter office, which are not instructions, need not be kept, as they are on file in the Grand Chapter office. Your Worthy Matron might enjoy having letters from the Worthy Grand Matron for her yearbook, after they are read. Important communications should be kept in a permanent file or attached to a member's record. Requests for demits should be attached to the member's petition.

## **CONSOLIDATION**

(Sec. 289–294)

Two or more chapters in the same general geographic area may consolidate and form one chapter. Before proceeding, a chapter shall request information and assistance from a member of the Grand Chapter Consolidation Committee.

See Fees

## **CONSTITUTION & LAWS OF THE GRAND CHAPTER**

(Sec. 254; 257)

Each chapter has been given eight copies of the Constitution and Laws for the use of the eight elected officers. After each session of Grand Chapter, eight copies of the amendments to the Constitution and Laws are sent to the chapter together with a bill for those amendments.

A chapter may purchase the Constitution and Laws for the use of the appointed officers. Such books must be returned to the Worthy Matron at the expiration of their term of office.

Any member in good standing may purchase a copy of the Constitution and Laws. The member making the purchase will be required to keep that copy of the Constitution and Laws current, which will require the payment of a nominal fee for amendments or revisions when such changes are made at Grand Chapter session.

The Constitution and Laws is divided into Parts:

- Part I pertains to Grand Chapter in California
- Part II pertains to Grand Chapter's bylaws, rules, committees and sessions
- Part III pertains to Subordinate Chapters
- Part IV pertains to the Benevolent Fund and the Foundation
- Part V pertains to the Eastern Star Home
- Part VI pertains to Discipline

Our rules and regulations are in the Constitution and Laws, which is overseen by the Grand Chapter Committee called the Constitution and Bylaws Committee.

Amendments — Sec. 111 (17), 113

See Resolutions

## **CONTRIBUTIONS AND MEMORIALS**

All contributions and memorials to our various Eastern Star charities made through the chapter must be acknowledged by the Secretary and sent to the Grand Chapter office. Cards are available at no charge from the Grand Chapter office to acknowledge these contributions and memorials.

The individual donations are to be deposited into your chapter's checking account. Each individual donation does not need to be sent to the Grand Chapter office when it is received. A total amount may be sent to the office periodically. Complete the Check Transmittal form and forward to the Grand Chapter office with the chapter's check. Do not send checks to the various committee chairmen.

Chapter contributions or memorials to any Fraternal organization or to any Fraternal Hall Association for any purpose whatsoever will require a Special Dispensation. (Sec. 206(6)(7))

See Acknowledgements  
See Check Transmittal Form.

## **COURTESY INITIATION**

(Sec. 230–232, 217)

A Chapter may by majority vote at a stated meeting request another chapter in this jurisdiction or a chapter in another jurisdiction to confer the degrees as a courtesy on its elected petitioner.

## **COURTESY INVESTIGATIONS**

(Sec. 210; 250)

If a petitioner for initiation, affiliation or reinstatement does not live in the locale of your chapter, your Worthy Matron may ask a Worthy Matron of the closest chapter in California to conduct a Courtesy Investigation on the petitioner.

If a petitioner is not a resident of California, your Worthy Matron would send a request for the Courtesy Investigation to the Grand Secretary of California, who shall ask the other jurisdiction to make the Courtesy Investigation.

In each case, the Reports of the Investigation Committee shall be certified over the seal of the chapter making the investigation.

## **CREDENTIALS FOR GRAND CHAPTER**

(Sec. 29, 99)

All members attending closed Grand Chapter sessions must have credentials. A Credential Request form will be sent to you in the July mailing. On the form you will list the elected and installed Line Officers that are going to attend Grand Chapter, and any members of your chapter attending (Sec. 8).

On the back of the form indicate the number of additional legislative booklets required, sign your name and affix the chapter seal.

Please read carefully and follow the instructions that are sent to you with the credential order form. The cost of the credentials is \$15.00 per member.

Members may attend the Informal Opening Session, Fun Night, Masonic Family Session, and the Installation without a credential. Non-members may attend these events at the invitation of a member.

## **DECEASED/PRESUMED DECEASED**

If there is a member on your rolls who has not paid their dues, you are unable to make contact with her/him and she/he was born prior to 1940, you may notify the office that you were unable to locate her/him and she/he is presumed deceased. This will take that member off your rolls and you will not have to go through the process of suspension. If that member is located in the future, she/he can be “resurrected”!

## **DEMITTS**

(Sec. 236–238)

A request for a demit must be signed by the member or the demit must be requested verbally by the member in open Chapter. You may provide the member with a Request for a Demit form. Dues must be current to the end of the preceding month before a Demit is requested and the current dues receipt is to be surrendered to the Secretary.

Tell your Worthy Matron immediately when you receive a request for a Demit. Any member requesting a Demit should be contacted by the Worthy Matron to find out why she/he is requesting a Demit. If the request is due to inability to pay the dues, the dues may be remitted by a vote of the Chapter. If action on the request for a Demit is deferred until the member can be contacted, the Demit, when issued, must bear the date of the stated meeting at which it was first requested.



If a plural or dual member requests a Demit, the other chapter must be notified immediately; you may use the Notification of Discontinuance of Multiple Membership form for this purpose. The member would be given a Certificate of Discontinuance of Multiple Membership.

A Demit is good forever. However, if a Demit is over six months old, a member cannot visit or affiliate with a chapter unless within the last six months it has been endorsed that the member has paid six-month's dues to a chapter. When filling out the Demit, put the membership number on it and fill in the membership information.

A Members of two chapters that wants to affiliate with your chapter cannot submit a Petition for Affiliation until she/he has terminated her/his membership in at least one of the chapters. The member should request a Demit from one of her/his chapters. If she/he is a plural member, she/he would receive a Certificate of Discontinuance of Multiple Membership; however, a dual member might receive a Demit. If the member receives a Demit, she/he should turn it over to her/his remaining chapter before requesting a Certificate of Good Standing. A Secretary can assist a member in getting a Demit by using a "Request for a Demit" form and having the member sign the request form.

Dues paid in advance of the month of the meeting at which a Demit is granted shall be prorated and refunded to the member. If it is before June 30<sup>th</sup> also refund the Home Assessment. After June 30<sup>th</sup>, do not refund the Home Assessment.

If a Demit is dated more than six months prior to the time of petition, and has no endorsement of a sum equal to six-months dues paid to a chapter, a sum equal to six-months dues of the chapter being petitioned must be paid and the Demit endorsed. (Sec. 202 (5)) Demits from other jurisdictions are deemed to be in good standing for twelve months (Sec. 238).

Demits should be stapled to the petitions and kept as part of your chapter's permanent file.

Duplicate Demits: A former member may request a duplicate Demit. This should be done immediately and does not take action of the Chapter. Check the chapter's records and fill in the Demit as it would have been filled out when the request was originally received. Where the Demit would have been signed by the secretary, type the name and put "(Signed)" after it. At the top, type "Duplicate demit issued (date)," sign your name as Secretary and affix the Seal.

## **DIAGRAMS OF THE LABYRINTH**

(IB 96, Ritual 168)

The Diagrams are found in the Ritual and the Instruction Book.

## **DISBURSEMENTS**

(Sec. 173)

For each check that is written you must have the vote of the Chapter; either by a motion passed by the members or an audited bill that the members voted to pay. The only exceptions would be assistance given by the Relief Committee or the check for per capita.

The Treasurer shall write the checks. The Secretary shall receive the bank statement, review it against checks that have been requested to be paid, and give it to the Treasurer to reconcile the checkbook.

The checks should be filled out and signed by any two of these three installed officers, Worthy Matron, Secretary or Treasurer.

See Acknowledgements

## **DONATIONS**

See Acknowledgements

## **DUAL MEMBERSHIP**

(Sec. 192; 249)

Dual Membership involves membership in one chapter in California and one chapter in another jurisdiction. Some jurisdictions do not allow Dual Membership and will not issue a Certificate of Good Standing, which must accompany a petition for affiliation. Check with the Grand Secretary of the other jurisdiction to see if they allow Dual Membership. Dual membership is only authorized in California if the other jurisdiction allows it too.

**A MEMBER MAY ONLY BELONG TO TWO  
CHAPTERS ANYWHERE IN THE WORLD.**

Dual members who are suspended for non-payment of dues or other causes in another jurisdiction, are automatically suspended from their California chapter. In which case, a “Notice of Suspension of a Suspended Dual Member” should be sent to the member. If you suspend a Dual Member, immediately notify the Secretary of the other chapter or the Grand Secretary of the other jurisdiction. The “Notification of Suspension of Dual Member” form may be used.

If a Dual Member resigns from the California chapter, immediately notify the other chapter in which the member holds membership. You may use the “Notification of Discontinuance of Multiple Membership” form for this purpose.

**DUES**

(Sec. 244, 245, 246, 247)

All members of a chapter, except life members and exempt members, shall pay such annual dues as the bylaws of the chapter may provide.

Dues are not collected from new members until the bylaws have been signed and shall be pro-rated. (Sec. 227)

If there is a change in the rate of dues, any payment made covering a period more than one year in advance of the effective date of such change shall be adjusted in accordance with the new rate.

Remittance envelopes are provided by the Grand Chapter office at no cost to the chapter. They may be picked-up at the Grand Chapter Session.

- see Candidates
- see Dues Remitted
- see Notices
- see Prorated Dues
- Reinstatement — Sec. 250
- see Reinstatement
- Remission — Sec. 248
- see Remittance Envelopes
- Suspension — Sec. 249
- see Suspension

## **DUES RECEIPTS**

(Sec. 244–247)

Dues receipts are provided by General Grand Chapter. California Grand Chapter will send a supply to your chapter with a bill for the receipts prior to the end of the year. Dues receipts must be issued as soon as possible following the payment of the dues.

A dues receipt must be given to every member who pays her/his dues. Fill in the total amount received on the dues receipt, the date the dues are paid to, and send it, as soon as possible, to your member. It should be noted on the dues receipt if the member holds an office, is a Grand Officer, Past Matron or Past Patron, is a Life Member (paid) or a 50-year Life Member.

If your chapter's bylaws provide for semi-annual payment of dues and the member pays the first half, the dues receipt will reflect the date that dues are paid to (June 30, \_\_).

The amount on the dues receipt should reflect the amount of the dues and any assessments paid. If your chapter dues are \$20.00 and the member is not a Life Sponsor of the Eastern Star Home and pays the \$5.00 assessment, the amount on the dues receipt will be \$25.00 (Sec. 247).

On the dues receipt you should indicate the name, number, and location of your chapter: this may be done using a rubber stamp. The dues receipts may be numbered in advance. The date on the dues receipt should be the date you receive the money. They are to be signed by the Secretary and the Seal affixed.

At the first of the year, a receipt for dues should be made out and given to all Life Members due to fifty years of membership in California, Paid Life Members, members whose dues are remitted by vote of the chapter or for salary for services and those residing in charitable homes.

Before the chapter issues a receipt for dues to a brother, the Worthy Patron should know his Masonic standing. The member must certify in writing, or present for inspection to the Worthy Patron, a receipt for dues showing that he is an affiliated Master Mason in good standing. (Sec. 247)

In case dues are paid in advance for a longer period than the current year, at the beginning of each new year the Secretary shall issue a receipt in the form in use for the new year, marking the same “duplicate.” (Sec. 247)

In the event of a change in the rate of dues, any payment made covering a period more than one year in advance of the effective date of such change shall be adjusted in accordance with the new rate. The member will have to pay more, if the dues have increased. Or, the member could receive a refund, if the dues are lowered.

Receipts for dues must be read in detail, at the meeting at which received, entered in the minutes in detail, and read at the succeeding meeting from the minutes. A chapter may vote to read the total of only the dues and assessments when reading the minutes of a meeting. All other receipts must be read.

Duplicate Receipt (Sec. 247): Any member entitled, may request a duplicate receipt. On the stub put “Duplicate receipt issued (date) for receipt No. \_\_\_\_\_.”

The following are some examples:

• **Receipt No. 1** 50-year life member

No. 001  
January 1, 20 08  
Shirley Orth  
Member  
 \$ 50-year life member  
 For Dues to  
December 31, 20 08

Official Receipt for Dues, Order of Eastern Star  
 No. 001 January 1, 20 08  
 This Certifies, That **2008**  
 Shirley Orth, PM, Grand Secretary Emeritus  
 Has Paid To  
 California Chapter No. 4, OES  
 Located at San Francisco, California  
 Signature of Member  
 For Dues To December 31, 20 08  
April Hansen Sec'y.

• **Receipt No. 2** Paid Life Member

No. 002  
January 1, 20 08  
Maryann Barrios  
Member  
 \$ paid life member  
 For Dues to  
December 31, 20 08

Official Receipt for Dues, Order of Eastern Star  
 No. 002 January 1, 20 08  
 This Certifies, That **2008**  
Maryann Barrios, PM, Grand Secretary  
 Signature of Member  
 Has Paid To  
California Chapter No. 4, OES  
Located at San Francisco, California  
 For Dues To December 31, 20 08  
April Hannum Sec'y.

• **Receipt No. 3** \$24.00 dues plus \$5.00 assessment

No. 003  
January 1, 20 08  
Pam Sandstrom  
Member  
 \$ 29.00  
 For Dues to  
December 31, 20 08

Official Receipt for Dues, Order of Eastern Star  
 No. 003 January 1, 20 08  
 This Certifies, That **2008**  
Pam Sandstrom, PM  
 Signature of Member  
 Has Paid To  
California Chapter No. 4, OES  
Located at San Francisco, California  
 For Dues To December 31, 20 08  
April Hannum Sec'y.

• **Receipt No. 4** \$24.00 dues and is a Life Sponsor of the Home, so no assessment paid

No. 004  
January 1, 20 08  
April Hannum  
Member  
 \$ 24.00  
 For Dues to  
December 31, 20 08

Official Receipt for Dues, Order of Eastern Star  
 No. 004 January 1, 20 08  
 This Certifies, That **2008**  
April Hannum, PM, Associate Matron  
 Signature of Member  
 Has Paid To  
California Chapter No. 4, OES  
Located at San Francisco, California  
 For Dues To December 31, 20 08  
April Hannum Sec'y.

- **Receipt No. 117** \$12.00 dues on member joining the chapter in July.

No. 117  
July 8, 20 08  
James Hannum  
 Member  
 \$ 12.00  
 For Dues to  
December 31, 20 08

Official Receipt for Dues, Order of Eastern Star  
 No. 117 July 8, 20 08  
 This Certifies, That **2008**  
James Hannum, PP, Associate Patron  
 Has Paid To  
 California Chapter No. 4, OES  
 Located at San Francisco, California  
 For Dues To December 31, 20 08  
April Hannum Sec'y.

- **Receipt No. 120** Dues paid to September 2, 2002, which is the date dues paid to when a Demit was granted and the remainder of the year's dues refunded.

No. 120  
September 5, 20 08  
Russ Kleber  
 Member  
 \$ 23.00  
 For Dues to  
September 2, 20 08

Official Receipt for Dues, Order of Eastern Star  
 No. 120 September 2, 20 08  
 This Certifies, That **2008**  
Russ Kleber, PP  
 Has Paid To  
 California Chapter No. 4, OES  
 Located at San Francisco, California  
 For Dues To September 30, 20 08  
April Hannum Sec'y.

- **Receipt No. 300** Duplicate dues receipt

Duplicate Receipt issued August 3, 2008 for receipt No. 004.  
 No. 156  
January 1, 20 08  
April Hannum  
 Member  
 \$ 24.00  
 For Dues to  
December 31, 20 08

Official Receipt for Dues, Order of Eastern Star  
 No. 156 January 1, 20 08  
 This Certifies, That **2008**  
April Hannum, PM, Associate Matron  
 Has Paid To  
 California Chapter No. 4, OES  
 Located at San Francisco, California  
 For Dues To December 31, 20 08  
April Hannum Sec'y.

## DUES REMITTED

(Sec. 248)

A chapter must vote each year to remit the dues of members who are unable to pay them. After an investigation by the Worthy Matron and/or the Relief Committee, a motion is made to remit the dues of a needy member. (The name should not be given in open Chapter.) If the members vote to remit the dues, a dues receipt is made out for this member. The date on the dues receipt is the date the motion was made. The dues receipt is filled out for the amount of the dues and the Home Assessment if not a Life Sponsor. On the stub it is noted, "Dues remitted per motion (date)." On the member's membership page it is also noted. In the minutes of the meeting the motion to remit is stated, but the member's name is not read. In writing the minutes you put the member's name in parenthesis.

The following is an example:

- **Receipt No. 24** Dues on a member whose dues were remitted

No. <u>024</u>	<u>January 19, 20 08</u>	<u>Mary Smith</u> Member	Dues remitted by motion 1-15-2008	\$ _____	For Dues to <u>December 31, 20 08</u>	Official Receipt for Dues, Order of Eastern Star No. <u>024</u> <u>January 19, 20 08</u>
						This Certifies, That <b>2008</b>
						Mary Smith
						Has Paid To
						California Chapter No. 4, OES Located at San Francisco, California
						For Dues To <u>December 31, 20 08</u>
						<u>April Hansen</u> Sec'y.

## DUTIES OF OFFICERS

(Sec. 158–162A)

## EASTERN STAR HOME

dba Senior Living Community

(Sec. 450–469)

Direct requests for applications for admission to the Eastern Star Home to the Outreach Department at the SLC (714) 577-9281 or Toll Free (877) 567-2273.



**Admission Criteria:** Per Sec. 458, one must be at least 65 years of age; be an affiliated member of the Order for five years in this Grand Jurisdiction and not less than three consecutive years with the chapter through which the application is made. The member may require and receive assistance in the areas of bathing, dressing, and medication management upon admission. The member may use a walker, cane, or wheelchair as long as they are independent in the use of the equipment. Must be in good physical and mental health. The member's respective spouse is eligible for admission along with them whether a member of the Order or not and regardless of age.

## **ELECTION OF OFFICERS**

(Sec. 130–135; IB 87)

The **Annual Election of Officers** is to be held on the first stated meeting in October. If the chapter will not meet in October and this is because one or more of its possible meeting nights falls on a holiday, as defined in its bylaws, then the election may be held on the last stated meeting in September or first stated meeting in November. Notice to the membership of this meeting is required (Sec. 146), but no Special Dispensation is required. If it is held at a time other than above, a Special Dispensation is needed and the members must be notified of the change.

If a chapter meets twice a month and the first stated meeting date falls on a holiday defined in the chapter's bylaws or during Grand Chapter, then the chapter will hold its election on the second stated meeting date of October which is now the first stated meeting.

Procedure — Sec. 134; IB 87

Immediately following your annual election of officers you will notify the Grand Secretary of the names, membership number, addresses and phone numbers of the elected officers on the form provided by Grand Chapter. This information is used to compile the State Roster and **MUST** be received by the Grand Chapter office by November 1<sup>st</sup> for your chapter to be included in the Roster. If you only send in a list of the elected officers, keep a copy of this form to list the appointive officers on the back and send to Grand Chapter as soon as possible.

No member shall hold two or more offices at the same time in any one chapter, nor more than one elective office for more than 45 days due to installation scheduling (Sec. 131). A plural or dual member may hold an appointive office in one chapter and an appointive or elective office in the other chapter.

**Special Election of Officers:** Within 60 days of a vacancy occurring in an elective office, a Special Election to fill that vacancy must be held. The Worthy Matron would also call a Special Election if a member decides to fill a vacancy left from any prior election. All members must be notified of a Special Election, at least 10 days prior to the election. Neither the names of the members seeking election nor the offices to be elected should be in the notice (Sec. 146).

A Special Election to fill a vacancy that occurs during the term must be held even if the Worthy Matron has not been informed of a member interested in running for the office. Members may submit nominations anytime during the meeting at which the election is being held.

Offices to be filled should not be mentioned in the notice because elections may be held for any office that becomes vacant prior to or at the meeting. As nominations may be received anytime prior to the election, members names are not mentioned since not all the names may be known at the time of the notice

The Annual Election of Officers and any Special Election of Officers must be held on a stated meeting.

After any election, the Grand Secretary must be notified of the office, name, membership number, address, phone number of the newly elected officer and the date installed. If a member has resigned from an office, include the date of resignation.

See Notices

Resignation of office — see Sec. 142

## **EMBLEM, EASTERN STAR**

Plain Star — Chapter use

Star with Pentagon — Grand Chapter use

Star with Pentagon and Circle — General Grand Chapter use

## **EMPLOYER IDENTIFICATION NUMBER**

(E.I.N., F.I.N., or T.I.N.)

Every chapter is required to have a Federal Employer Identification Number to be used on their bank accounts and when required to report payroll taxes. Apply at the Internal Revenue Service office or online at <http://www.irs.gov> on a Form SS-4, Application for Employer Identification Number. The EIN will have 2 digits, a dash, followed by 7 digits (##-#####).

This number will show on your chapter's Annual Report to Grand Chapter. If a chapter consolidates, the number associated with the Chapter Number that is being retained will be the EIN number for the new chapter. These numbers are verified annually in a report to the IRS, which is completed by Grand Chapter.

## **EMPLOYMENT DEVELOPMENT DEPARTMENT (E.D.D.)**

This number is required by the State of California for all chapters that pay salaries totaling more the \$100.00 in any quarter. It may be obtained from the Employment Development Department, P. O. Box 826880, Sacramento, CA 94280-0001 on form DE 1 NP.

This number will be printed on your Annual Report to Grand Chapter.

## **ENDOWMENT**

(Sec. 75)

The funds in the Endowment are either restricted or unrestricted. The original amount (principal) that established the Endowment Fund is restricted and may not be used for the operation of the Home. The interest realized (gained) on the principal is unrestricted and may be used for the operation of the Home.

Donations to the Endowment Fund must specify whether they are restricted or unrestricted. A restricted donation is one in which only the interest earned on the donation, not the principal of the donation, may be used for the operation of the Home. An unrestricted donation may be used directly for the operation of the Home. Only the donor can restrict her/his donation; so, if no designation is made, the donation will be unrestricted.

See Endowment Committee

See Life Sponsorship

## ENDOWMENT FUND COMMITTEE REPORTS

(Sec. 75)

**Annual Report:** You will receive, before June 30<sup>th</sup>, a form on which to make the Annual Report to the Endowment Fund Committee Chairman.

The committee will want to know the total number of Dues Paying Members listed on your June 30<sup>th</sup> Annual Report to Grand Chapter. They will also want to know the dollar amount of contributions, Life Sponsor purchases, memorials, Star-Plus donations sent to the Grand Chapter office during the period July 1<sup>st</sup> through June 30<sup>th</sup>. The money MUST be in the Grand Chapter office by June 30<sup>th</sup> to be counted in the current year.

If the amount equals \$1.00 for each Dues Paying Member, your chapter is entitled to 100% Honor Roll status, and the chapter will be given a certificate or a gold star by the Endowment Fund Committee.

**Star-Plus Program:** The Endowment Fund Committee has prepared certificates to be presented to any member, who is already a Life Sponsor of the Eastern Star Home, who contributes \$50.00 or more to the Endowment Fund. The money must be sent to the Grand Chapter office payable to Grand Chapter Endowment Fund and marked Star-Plus donation.

On a form provided by the Endowment Fund Committee, you will request Star-Plus Certificates from the Chairman of the Endowment Fund Committee. She/he will want to know the name of the member and the amount of the donation to the Star-Plus Program. These members must already have become Life Sponsors of the Eastern Star Home.

## FEES

**Consolidation Fee:** (Sec. 293) Upon completion of a consolidation of two or more chapters, each chapter shall pay a fee of \$50.00 to Grand Chapter.

**Membership Fees:** (Sec. 198; 199) In your chapter's bylaws your members have set the fee for initiation and affiliation. The initiation fee shall not be less than \$5.00. The affiliation fee shall not be less than \$2.50 and not more than one-half of the initiation fee. The members vote on the fee for each reinstatement. (Sec. 250) These fees must accompany the petitions.

In addition to the membership fee, \$15.00 for the Grand Chapter Endowment Fund must be paid with every Petition for Initiation and every Petition for Affiliation accompanied by a Demit or Certificate of Good Standing from a chapter in a jurisdiction other than California. \$10.00 for the Grand Chapter Endowment Fund must be paid with every Petition for Affiliation accompanied by a Demit or Certificate of Good Standing from a chapter in this jurisdiction. A \$5.00 fee for the International Temple in Washington D.C. is collected from all initiates and affiliates joining a chapter for the first time.

The membership fees are part of the income for the chapter, but the fees for the Endowment Fund and the International Temple are sent to Grand Chapter as part of the per capita. The office will calculate what is due and it will be billed on the annual per capita bill. The fees accumulate in the chapter's checking account until the per capita is paid.

**Per Capita Fees:** (Sec. 96) These fees are included in the dues you collect from your members. The chapter must pay these fees on their membership in good standing as of June 30<sup>th</sup>. The fees are for the amount listed in Sec. 96, unless voted otherwise by the delegates at the last session of Grand Chapter, with exception of the Insurance Fund fee, which is set by the Finance Committee each year.

These per capita fees are paid to Grand Chapter based upon membership at the time of the Annual Report. These should not be paid until you receive the Per Capita Bill.

**2008 Per capita:**

Admission Fee: \$0.50 for each member initiated or affiliated

The following are charged for each non-exempt (Sec. 98) member of a chapter:

Dues:	\$ 4.00
Home Maintenance Fund:	\$ 1.00
Benevolent Fund:	\$ 0.45
Convention Fund:	\$ 0.25
Scholarship Fund:	\$ 0.10
Insurance Fund (this is the estimated amount for 2009):	\$ 5.75

The following is charged for every member of the chapter.

General Grand Chapter Assessment:	1.00
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**Registration Fee:** (Sec. 99) All members attending any closed session of the annual Grand Chapter Session shall pay a registration fee, currently \$15.00. You must return the Credential Request form provided by the Grand Chapter office with the registration fee.

**Special Dispensation Fees:** (Sec. 100) Fees are required for Special Dispensations. They are listed on the Request for a Special Dispensation form.

## **FELONY CONVICTION**

(Sec. 933)

If a member is convicted of a felony, there are certain procedures to be followed. The Secretary will secure two certified copies of the judgment. One copy is to be filed in the records of the chapter and the other to be given to the Worthy Matron of the chapter.

If a member is a Grand Officer, a Worthy Matron, or a Worthy Patron, then the Grand Secretary is to be notified and will handle the procedure.

The Worthy Matron shall notify the member (in writing by certified mail and return receipt requested, to the last known address) of the filing of such a record of conviction and requiring the member, within sixty days, to elect in writing to be tried on the charge of conduct unbecoming a member.

The written election shall be filed with the Secretary and a copy shall be forwarded to the Worthy Matron. The Worthy Matron shall commence the proceedings to bring the member to trial.

If no election is filed within the period of time provided, the Worthy Matron shall, at the stated meeting following the lapse of time, declare that the member is expelled from the Order. This is recorded in the minutes, and the pertinent portion of the minutes, together with a certified copy of the judgment and statement that proper notice was given, is sent to the Grand Secretary.

## **FIESTA**

Traditionally, the Secretaries and Treasurers sell tote bags at the Fiesta and anything that would go inside one. Donations of items are greatly appreciated, especially the plastic canvas tote bags.

## FIFTY-YEAR PINS AND CERTIFICATES

(Sec. 194; IB 101)

The chapter shall pay for a 50-year pin and certificate when a record of 50 years membership in the Order, in good standing, is established by any member. The member must be a member in good standing in the jurisdiction continuously for at least one year prior to receiving the pin and the certificate.

A 50-year pin and certificate may be presented any time during the calendar year in which the 50 years of membership is attained. A 50-year pin shall be worn only by a member who is so entitled and **cannot** be presented posthumously.

A member receiving her/his 50-year pin at a Chapter meeting should be escorted to the East, given Grand Honors, and (at the discretion of the Worthy Matron) be asked to remain in the East for the remainder of the meeting.

The Secretary shall request the pin and certificate on a form provided by the Grand Chapter office, giving the member's name and membership number, at least one month before presentation.

If any part of the membership is in another jurisdiction, the Secretary shall write to the Grand Secretary of that jurisdiction using a Verification of Membership form, obtain the date of initiation/affiliation, the date of the demit, and if the membership was continuous. When the Verification of Membership (VOM) is received, a copy of the verification with the request for the 50-year pin is sent to the Grand Chapter office. The names and addresses of the Grand Secretaries are listed in the State Roster. This verification is a must in order to fill the request.

If a 50-year pin is lost, it can be replaced. The cost is on the Order Form/Price List.

Fifty-year Life Membership certificates will be sent to the chapter with the pin only if the date is filled in on the fifty-year pin request form indicating when the Chapter voted for the Life Membership providing the member has fifty years good standing in the Order under Genral Grand Chapter, of which at least twenty-five years must of been in California, and the last one year's membership in the chapter giving the Life Membership. The certificate is not to be presented to the member until they are eligible; however, the Grand Chapter office will send the certificate to the chapter anytime during the year in which the member will be eligible.

If a member from out-of-state affiliates with your chapter, you may write for the Verification of Membership any time and keep the written verification with the member's petition.

See plural members

## **FINANCE COMMITTEE OF GRAND CHAPTER**

Investment requirements for subordinate chapters are listed in the following Sections: 73, 95, 95A.

## **FORMS, BOOKS AND RECORDS**

(Sec. 253)

Do not use forms dated earlier than the years appearing next to their listing on the Order Form/Price List. Throw away forms not having a date in the lower corner. Do not use old forms.

Most of the forms are available on the website. Others may be e-mailed to you from the office. You may make copies of all forms, but some are on a particular colored paper and that is very important to this office. If you copy the various petitions provided by Grand Chapter, please make the copies on heavy 24+ lb. archival paper.

Chapters SHALL use the following adopted by Grand Chapter:

Petitions for Initiation, Affiliation, and Reinstatement

Report on Petitions

Certificate of Restoration

Certificate of Good Standing

Visiting Certificate

Demit

Life Membership Certificate

Honorary Membership Certificate

Fifty-Year Certificate

Fifty-Year Life Membership Certificate

Rob Morris Award

Service Award

Receipts for dues

Bylaw Book

Register

Roll Call Book

Minute Book

Combined Loose Leaf Ledger, Cash Book and

Membership Record

Treasurer's Cash Book

Treasurer's Receipt Book



Chapters may use the following forms provided by the Grand Chapter office: Notices of Annual Elections, Notice of Dues, Notice of Delinquent Dues, Notice of Election for Initiation, Notice of Election for Affiliation, Notice of Suspension, and Notice of Rejection.

See Forms in the back of this book.

## **FOUNDATION**

(Sec. 420–426)

The California Eastern Star Foundation, a non–profit corporation, was established in 1996 to receive gifts, bequests, and contributions.

The following funds are the responsibility of the Foundation:

- Benevolent Fund (Sec. 82, 400–409)
- Cancer Research Fund (Sec. 91A)
- Disaster Fund (Sec. 410)
- Eastern Star Patient Comfort Program (Sec. 91)
- Eastern Star Training Awards for Religious Leadership (ESTARL)
- Gerald P. Cashion Fund (Sec. 88A)
- Grand Chapter Heart Fund (Sec. 92)
- J. Clifford Lee Memorial Cancer Fund (Sec. 89A)
- Marguerite Rennie Memorial Fund (Sec. 89B)
- Medical Research Fund (Sec. 92A)
- Scholarship Fund (Sec. 88)
- Scholarship Endowment Fund (Sec. 87)

## **FRATERNAL VISITS**

(Sec. 152, 243)

A chapter fraternal visit is not a meeting of the visiting chapter; however, the officers may, on invitation, assume the stations.

The Fraternal Greetings form is available to send to the chapter of a member who has visited your chapter informing them of the visit.

## **FUNERALS**

(Sec. 157; IB 99, Ritual 153, 160a)

Every member in good standing is entitled to an Eastern Star Funeral Ceremony at the time of their death. A chapter may, in the discretion of the Worthy Matron, conduct the service for a member who was not in good standing at the time of death, if the family requests an Eastern Star service.

Any Funeral Ceremony shall be reported at the next stated meeting and the fact thereof shall be entered in the minutes.

See Graveside Service — IB 99

## **GOLDEN CHAIN**

(IB 69–71)

After the Worthy Patron gavels and the Worthy Matron begins to leave the East, all officers begin to move toward the Labyrinth.

The Secretary leaves her station and joins the Marshal at her/his station standing shoulder to shoulder on the left side. If the Secretary leaves the station on the left side of the Marshal's station, she/he moves directly to the left side of the Marshal. If the Secretary leaves the station and is to the right of the Marshal's station, go in front of the Marshal and move into place shoulder to shoulder on the left side.

The Treasurer leaves her/his station at the same time and advances to the Labyrinth on the marching line.

Leaving the Labyrinth, the officers back toward the edge of the Labyrinth normally three steps. If the Secretary will start on her left foot and take the three steps (left, right, left), then take a large step toward the south with her right foot and at the same time turning to the west. Continue turning toward the east as you bring the right foot around facing east. Hesitate as the Marshal does the same with smaller steps. You should end shoulder to shoulder and march toward the east.

The Treasurer will start on the opposite foot (right, left, right) and turn toward the west as the right foot comes around facing toward the north. Complete the turn to face the east and march toward your station.

The two officers should mirror each other in returning to their stations (See Opening).

## **GOOD STANDING**

(Sec. 233–235)

Any member who has not demitted from all chapters, has not resigned from the Order, is not suspended for non-payment of dues or assessments, is not currently on suspension after a trial, and has not been expelled from the Order is in good standing.

## **GRAND CHAPTER HEART FUND**

(Sec. 92)

The purpose of the Grand Chapter Heart Fund is to provide a yearly donation of all funds collected during that Grand Chapter year to a heart related charity or organization designated by the Worthy Grand Matron, with the approval of the Board of Trustees of the California Eastern Star Foundation. The Heart Fund is under the California Eastern Star Foundation on the Check Transmittal form.

## **GRAND CHAPTER SESSION**

(Sec. 23, 99, 111, 148)

Grand Chapter will hold its annual session on the date and time determined by Grand Chapter at a preceding annual session. It shall continue for not more than three consecutive days, Sundays excepted. Preference shall be given to weekend dates in October, not in conflict with the Annual Communication of the Grand Lodge of Masons in California.

No chapter meetings will be held on the days designated for the annual session of the Grand Chapter, nor on the day prior to the Formal Opening, nor the day following the close.

Deadline for legislation and résumés for those running for elected office and trustees is 120 days prior to the opening date of the next annual session.

## **HEART FUND**

see Grand Chapter Heart Fund

## **HONORARY MEMBERSHIP**

(Sec. 183; IB 81)

Honorary Members do not sign your chapter's bylaw book and are not reported on the Annual Report. No dues receipt is given to an Honorary Member as they do not pay dues.

Honorary Membership Certificates may be purchased from the Grand Secretary.

## **INITIATION**

(Sec. 197–203, 224, 225. IB 53, 61)

Petitions for Initiation may be received only at a Stated Meeting (Sec. 203). The petition must be accompanied with the proper fees (Secs. 198 and 199). The initiation fee shall not be less than \$5.00 and is set in the chapter bylaws.

Each petitioner shall include a contribution of \$15.00 for the benefit of the Grand Chapter Endowment Fund and \$5.00 for the use and benefit of the International Eastern Star Headquarters in Washington, DC. These contributions shall be paid by the chapter to the Grand Chapter with the per capita each year (Sec. 199).

The initiation shall not, except for good cause, be more than sixty days after the time of election. The Chapter may vote to extend this date.

The Secretary shall notify the applicant of the date and the appropriate dress for the occasion on the Notice of Election by Initiation. This will show the amount of the pro-rated dues for the rest of the year, the amount of annual dues and, if initiated before June 30<sup>th</sup>, the amount of the assessment.

On the youth pages of the State Roster are listed contacts for the International Order of Rainbow for Girls and Job's Daughters if you need to verify eligibility.

**Courtesy Initiation** (Sec. 230, 231, 232): A chapter may, by majority vote at a stated meeting, request another California chapter to confer degrees as a courtesy. A chapter may also request, through the California Grand Secretary, a chapter in another jurisdiction to confer the degrees.

## **INSTALLATION**

(Sec. 136–139; IB 95)

Notice must be given if Installation is held on a special date or at a special place (other than the regular chapter meeting date, time, and place) as provided in Sec. 146 (Sec. 138).

Postponed — see Sec. 137

## **INSTRUCTION BOOK**

(Sec. 254; 255)

The Instruction Book is prepared to assist Officers in performing their duties and uniformity in performance of the Ritualistic ceremonies.

Each chapter has been given eight copies of the Instruction Book for the use of the eight elected officers. After each session of Grand Chapter, eight copies of the amendments to the Instruction Book are sent to the chapter together with a bill for those amendments.

A chapter may purchase Instruction Books for the use of the appointed officers. Such books must be returned to the Worthy Matron at the expiration of their term of office.

Any member in good standing may purchase a copy of the Instruction Book. The member making the purchase is required to keep their copy of the Instruction Book current, which may require the payment of a nominal fee for amendments or revisions.

The Instruction Book may be changed by an amendment brought before the Grand Chapter membership and adopted by a two-thirds vote.

## **INSURANCE**

All potential claims must be directed to our Insurance Carrier — Thompkins Masonic Insurance Program, 1150 Marina Village Parkway, Suite 101, Alameda, CA 94501-1080, (510) 814-4141, as soon as possible, fax (510) 814-4144. There is a 90-day clause.

Copies of our policy are sent once a year to each chapter and should be kept on file.

Any questions regarding the Insurance should be directed to Thompkins and Company, not the Grand Chapter office.

If your chapter is having an event and insurance is required, Thompkins & Company should be called to secure a rider for the event, or a Request for Insurance Rider form may be used.

For those chapters paying a salary, each quarter a copy of the State DE 6 and Federal 941 forms are to be sent into the office. This information will be used for the amount of Workers' Compensation insurance that must be paid. (See Appendix B)

Once each year the chapter is required to provide the Grand Chapter office with a complete list of its property including the value of the items listed. The paraphernalia required by the Ritual with its replacement value will already be on the list when it is sent to you. If you disagree with this value, it must be changed prior to returning this report. (Sec. 169) The information is used by the insurance company to determine the amount of coverage needed and thus the amount for the per capita billing.

## **INTERNATIONAL EASTERN STAR HEADQUARTERS, WASHINGTON, DC**

(Sec. 199, 252)

General Grand Chapter's headquarters is located in the International Headquarters in Washington D.C. and each member is required to pay \$5.00 for each chapter she/he joins for its support.

For each initiate and affiliate for the first time in a chapter, \$5.00 must accompany the membership fee with the petition, for the International Headquarters. This money is sent to Grand Chapter as part of the per capita. There are certificates to give your new members for this \$5.00 donation available from the Grand Chapter office.

If moneys are sent to the Grand Chapter office for the International Headquarters during the year, we will consider them to be donations, and not part of the fees that are collected on the initiates and affiliates.

## **INVESTIGATION ON PETITIONS**

(Sec. 210–212; IB 21–22, Ritual 165)

The Report on Petition form is sent to three committee members, one of whom must be a brother, by the Worthy Matron. Neither the Worthy Matron, nor any member of the committee, may divulge to the other members of the committee, or to anyone, the name of any member of the committee. One member is appointed as Chairman and will ask the questions on the petition.

There are also Instructions for Investigation Committees that may be ordered from the office.

Petitions must be returned to the Secretary as they are permanent records of the chapter. However, the Reports on the Petitions will not be returned; they are destroyed by the Worthy Matron.

Name of petitioner **shall not** be published in any chapter bulletin or otherwise, prior to initiation or affiliation. (Sec. 212)

### **J. CLIFFORD LEE MEMORIAL CANCER FUND**

(Sec. 89A; 89C; 90)

See Applications for Assistance.

### **JEWELS**

(Red Book, Ritual 18, Sec. 176)

**Officer Jewels:** Each officer wears a badge of the office held. The badge is a jewel to be suspended by a ribbon or a cord of the five star point colors. The Star Points may be a solid cord or ribbon in the color of the particular office.

**Past Matron and Past Patron Jewels:** A chapter may appropriate from its funds an amount not greater than 10% of all money received by the Secretary for the general fund of the chapter during the preceding fiscal year, for the purchase of past officers' jewels for the retiring Worthy Matron and retiring Worthy Patron.

### **LABEL ORDER FORM**

A chapter may order address labels to use for receptions, official visits, anniversary celebrations, etc. from the Grand Chapter office. The charge is the same for ordering one category or all of the various categories listed on the order form. The order form must be signed and submitted with payment for the order.

### **LANDMARKS**

(Ritual 162)

### **LEDGER PAGES**

(Sec. 253)

Each chapter should have a loose leaf ledger in which are kept:

**White Membership Page:** There should be a white membership page for each member of your chapter. On the front is the name, current address and phone number, membership number and a record of the fees paid to the chapter. Across the top is a record of what each year's dues and Home Assessments were.

The Secretary shall note the date, amount received, dues paid to what date and the receipt number each time the member pays their dues.

On the back of the membership page is a record of all former addresses, the membership history taken from the petition at the time they joined your chapter and the offices and the years the member served.

The following must be noted on each member:

- Dates of initiation, affiliation, out-of-state affiliation
- Suspension date, reinstatement date
- Date of Demit
- Life Sponsorship purchase, Star Plus dates
- Rob Morris, Service Awards received
- 25-50-75 year certificates and pins earned

When the membership is terminated, the white membership page should be filed in an inactive membership file. It should never be destroyed and is part of the chapter's permanent file.

**Blue Membership Summary Page:** Any change in membership should be noted on the blue membership record page. The member's full name should be used with the membership number. This information is used to complete the Monthly Reports, your Secretary's annual report to your chapter and the Deputy Grand Matron's report at her Official Visit to your chapter. It is a good idea to keep a running count of the number of members in your chapter on the inside margin. One line should be used for each name. A line should be drawn across the page at Installation, Deputy Grand Matron's Official Visit and the June 30<sup>th</sup> Annual Report to Grand Chapter. These pages should be filed with the Annual Reports and are part of your chapter's permanent file.

**Yellow (Tan) Cash Pages:** The receipts and disbursements for each meeting and each check written should be entered on the yellow cash pages or financial computer ledger. There should be a heading for each item required on the Chapter Annual Financial Report. Extra pages may be used to give you a sufficient number of columns. Sub-totals should be kept on each column so you may inform the Worthy Matron how much has been spent or received in each category. These yellow cash pages are to be made available for the Audit Committee and must be kept for seven years. A cash management program or spreadsheet on the computer, may be used instead of the Yellow Cash Pages.



## **LEGISLATION**

(Sec. 113–115)

All proposed amendments to the Constitution and Laws and the Instruction Book shall be presented by written resolution filed in the Grand Chapter office, not less than 120 days prior to the opening date of the next annual session.

## **LIFE MEMBERSHIPS**

(Sec. 193)

There are two kinds of Life Memberships:

**For 50 years of membership in California:** (Sec. 193) A Chapter may vote to confer a Life Membership in such chapter on a member who has achieved 50-years good standing in any chapter within the jurisdiction of General Grand Chapter or of the General Grand Chapter itself, and who has been a member in good standing in the State of California for no less than 25 years, provided that the last one year was in the Chapter conferring the life membership.

This member is exempt from paying dues and the Home Assessment and is listed on the computer list with the Annual Report to Grand Chapter with the letter “F.” The number of members you have that have been awarded Life Memberships due to 50 years of membership in California, are deducted from your membership count on the Per Capita Bill and your chapter does not pay dues and fees and Home Assessment on them to Grand Chapter. However, if the member’s 50-year anniversary is after June 30th, per capita is still charged on that member. Therefore dues would be pro rated to the date of the anniversary. An “F” would not appear on the computer list until the next year for this member.

The 50-year life membership certificate is a gold-colored certificate. This certificate would be given to the member on her/his anniversary even though the pin and 50-year certificate may be given any time during the calendar year of the year she/he is eligible.

A list of these members in your chapter holding 50-year Life Memberships should be kept.

50-year Ceremony — see IB 101

**Paid Life Memberships:** (Sec. 126 (1); 181; 193) If your chapter's bylaws provide, any member of the chapter may purchase a Paid Life Membership in your chapter. These funds are kept in a separate bank account and the interest received by the chapter on the Life Membership Fund shall become a part of the general funds of the chapter at the close of the subordinate chapter year or on a monthly basis. A Paid Life Member must still pay all assessments by Grand Chapter. Certificates for Paid Life Memberships may be purchased from the Grand Chapter office.

A member may pay installments when purchasing Paid Life Memberships, but will pay annual dues until the installment contract has been met.

**Transfer of Paid Life Memberships:** The ability to transfer Paid Life Membership was eliminated in 2006. It was previously governed by Sec. 181, the portion of which dealing with transfers has been deleted, and Sec. 193A, which has been deleted in its entirety.

**Termination of Life Membership:** (Sec. 181) When the membership of a life member is terminated, the chapter may, by a two-thirds majority vote after special notice, transfer any portion of the principal to the general fund of the chapter. This includes any remaining balances from a member who transferred their life membership.

**Consolidations and Life Memberships:** (Sec. 311) If a consolidated chapter does not provide for Life Membership in its bylaws when one of the consolidating chapters did, then the life members of that chapter remain life members of the consolidated chapter.

## **LIFE SPONSORSHIP OF THE EASTERN STAR HOME**

(Sec. 98, 466, 466A, 466B)

The payment of \$50.00 will purchase a Life Sponsorship in the Eastern Star Home and exempts the member from the payment of any assessments levied by Grand Chapter for the maintenance of the Eastern Star Home. Send the money together with the name of the member and their membership number on the green Life Sponsorship Order Form provided by Grand Chapter, to the Grand Chapter office. Upon receipt, a green Life Sponsorship certificate will be sent back to you to be presented to the member.

You should mark the member's membership page and keep a list of current members who have Life Sponsorships. On the computer list with the Annual Report to Grand Chapter the members having Life Sponsorships are noted with the year that the member was first exempt from the Home Assessment. These members are deducted from the number of members on whom the Home Assessment is charged.

On your Monthly Report to Grand Chapter you list the member's name and membership number for those Life Sponsorships purchased and that you have sent money to Grand Chapter since your last Monthly Report.

A plural member is exempt from the Home Assessment in both chapters when she/he purchase a Life Sponsorship from the Grand Chapter. The Secretary must inform the Secretary of the other chapter when a Plural Member purchases a Life Sponsorship.

## **LOSS OF MASONIC STANDING**

(Sec. 187, 240–242)

A brother loses his good standing in the Order of the Eastern Star upon losing his good standing as a Master Mason. However, the good standing of a sister is not affected by any loss of Masonic eligibility requirements.

If a Mason loses his Masonic standing prior to signing the bylaws of a chapter, the petition and his election to membership are nullified (Sec. 187).

After suspending a Brother for loss of Masonic standing, the form "Notice of Suspension for loss of Masonic Standing" should be sent to him.

## **MAILINGS**

The Grand Chapter office will normally post communications on the website <<http://www.oescal.org>> by the 20<sup>th</sup> of each month. If you do not see the information, please contact the Grand Chapter office for help. The appropriate information is to be read at the chapter's following month's meeting.

Chapter-specific information will still be sent via US mail.

To include items in a mailing, they must be received in the Grand Chapter office and approved by the Worthy Grand Matron no later than the 10<sup>th</sup> of the month.

## **MARGUERITE RENNIE MEMORIAL CANCER FUND**

(Sec. 75A)

See Applications for Assistance

## **MASONIC AFFILIATION**

(Sec. 210, 228)

The brother on the Committee of Investigation must examine the evidence of Masonic affiliation. This may be a certificate or letter under the seal of the lodge, dated within three months prior thereto, or a current receipt for Masonic dues. If the Masonic affiliation is deceased, a certificate or letter of the affiliation and good standing of the Mason at the time of his death, under the seal of the lodge, must be furnished.

## **MEETINGS**

(Sec. 144–156, 258, 259; IB 7, Ritual 164)

There are two types of meetings: Stated (Sec. 144) and Special (Sec. 145). Stated meetings are provided for in your chapter bylaws. A Special Meeting is called by the Worthy Matron for a specific purpose.

All meetings, special and stated, must be opened and closed in ritualistic form (Red Book, Instructions 8).

All stated and special meetings as well as those called for open installation of officers must be recorded in the minutes of the chapter.

All matters affecting the right to membership must be transacted at a stated meeting of a chapter.

### **Anteroom Meetings:** (Sec. 150; IB 7–8)

An anteroom meeting is a stated meeting. Only four anteroom meetings may be held in any one year and are considered short form. The receiving of petitions and all other routine business may be conducted.

### **Short Form Meetings:** (IB 7)

Chapters may not open in short form more than 50% of the meetings during the year. This includes Anteroom Meetings.

All regular business may be transacted.

**Special Meetings:** (Sec. 145, 146)

No business shall be transacted except that specified in the notice to the membership that a Special Meeting has been called. The chapter is opened in regular form, minutes are not read and no other business transacted. The Worthy Matron shall proceed immediately to the business for which the meeting was called. The meeting must be closed in Ritualistic form.

**Stated Meetings:** (Sec. 144)

Stated Meetings are those provided by the bylaws of the chapter. You cannot do away with or change a Stated Meeting, except by amending the chapter's bylaws.

Age Limit — Sec. 258

Conduct — Sec. 259

Failure to meet — Sec. 156

Meetings to be Held — Sec. 148

Meeting Place — Sec. 149

Notice — Sec. 144

Permanent Change — Sec. 154, 155

Quorum — Sec. 147

Temporary Change — Sec. 153

**MEMBER RELOCATION**

(Sec. 162 (5))

When a member moves outside of the chapter's area, you shall contact a chapter close to where the member is relocated or send directly to the Grand Secretary in the other jurisdiction notification of the member's relocation. The contact information for other Grand Secretaries and chapters are in the Grand Chapter Roster. The Notification of Member Relocation form may be used for this purpose.

**MEMBERSHIP**

Sec. 190 — Adoption

Sec. 210, 228 — Evidence

Sec. 188 — Expelled

Sec. 8 — Grand Chapter

Sec. 187, 210, 228, 240–242 — Loss of Masonic Affiliation

Sec. 191, 192 — Plural and Dual

Sec. 184–186 — Qualifications

Sec. 183, 184 — Regular and Honorary

## **MEMBERSHIP FEES**

See Affiliation

See Consolidation

See Credentials

See Initiation

See Per capita

## **MEMBERSHIP PAGES**

See Ledger Pages

## **MEMBERSHIP QUALIFICATIONS**

(Sec. 184–186, Ritual 161)

## **MEMORIAL CANCER DRESSINGS FUND**

(Sec. 91)

See Applications for Assistance.

## **MEMORIALS**

(IB 25)

When you receive In Memoriam cards from Grand Chapter you should inform your Worthy Matron and they should be read at the next stated meeting. Under Circle of Concern, your Worthy Matron should say, “In Memoriam” the members will rise and the Secretary will read the In Memoriam card from Grand Chapter in its entirety. The Worthy Matron will take care of the memorials for your chapter members.

Members may contribute to any of our Eastern Star charities as a memorial contribution. Acknowledgment cards are available from the Grand Chapter office, at no cost, to send to the donor and to the family of the deceased. The Secretary shall acknowledge all memorials before the money is sent to Grand Chapter.

Donations of \$250.00 or more from a member should be by a personal check from the member made payable to either the California Eastern Foundation, the Grand Chapter Endowment Fund, or the Grand Chapter of California, as appropriate, and earmarked for the specific fund. These may be sent to the Grand Chapter either by the Secretary or the member, and will be acknowledged by Grand Chapter.

See Acknowledgments

## **MINUTES OF THE MEETINGS**

(Sec. 162, 172, IB 23, 51)

Secretary should stand when reading the minutes (See Standing).

Minutes shall be written out in full in a minute book supplied by the Grand Chapter office. If typewritten, they must be securely and permanently pasted therein before reading to the Chapter for approval.

A minute book is available from Grand Chapter with pages that are removable to use with a typewriter or a computer. The pages are then permanently bound in the binder. All pages are pre-numbered and must be accounted for. All numbered pages should be in the bound book even if they are not used or contain errors.

Should any corrections be ordered, the Secretary shall make them immediately. Except for corrections made at the time of approval, the minutes shall never be changed. Corrections of the minutes shall be made in the minute book as they are called to the attention of the Secretary, and before the minutes are given to the Worthy Matron for her signature.

A chapter may vote prior to the reading of the minutes, to read only the total of the dues and home assessments only for that previous meeting. All other receipts are read. (Sec. 162, 172, IB 23, 51)

The person who actually takes the minutes, whether Secretary or Secretary pro-tem, shall record them in the minute book and sign them.

Copies of the minutes cannot be made without a vote of the chapter, as the minutes are property of the chapter. Minute books are kept forever and are part of the chapter's permanent file.

Minutes must be taken at receptions, installations and special meetings. Each Secretary should take their own minutes at the Official Visit of the Worthy Grand Matron and Worthy Grand Patron.

Use full names and do not use nicknames. Try not to use abbreviations that someone else would not understand. Remember the minutes you are writing will become the history of the chapter.

Minutes are to contain a summary of the actions of the chapter, not discussion, nor what was worn. The exact wording of motions brought before the Chapter must be included in the minutes. Summaries of communications and remarks may be included if of interest for the future of the chapter. Written reports are to be included in the minute book.

See Sample Minutes — Appendix A

## **MONTHLY REPORTS**

See Reports to Grand Chapter

## **NON-AFFILIATED MEMBER**

(Sec. 238)

A member becomes a non-affiliated member on the issuance of a Demit and remains in good standing for a period of six months. A member from another jurisdiction is in good standing for a year. After such period of time, non-affiliates are not entitled to any of the rights, privileges or charities of the Order. Non-affiliates, who have paid six-months dues to a chapter in the process of affiliation, may visit other chapters for six months from the endorsement.

See Demits

## **NOTICES**

(Sec. 144, 146, 261, 262)

Special notices to your membership, pursuant to Section 146, may now be made by e-mail, if requested by the member and an email address has been provided by the member for that purpose.

- Notice of Annual Election
- Notice of Delinquent Dues
- Notice of Dues
- Notice of Election for Affiliation
- Notice of Election for Initiation
- Notice of Member Relocation
- Notice of Rejection
- Notice of Special Election
- Notice of Special Meetings (Sec. 144–146)
- Notice of Suspension of a suspended dual member
- Notice of Suspension for non-payment of dues or assessments
- Notice of Suspension for loss of Masonic standing
- Notification of Discontinuance of Multiple Membership
- Notification of Plural/Dual Membership
- Notification of Restoration of Dual Member



Notification of Suspension of Dual Member  
Reminder of Dues

See Appendix H

## **NOTIFICATIONS**

See Notices

See Appendix H

## **OBJECTION TO PETITION**

(Sec. 213–217)

Objections to petitions may be made at any time from before the petition is read until the ceremony for initiation or affiliation. See the various sections of the Constitution and Laws to determine the procedure when the petition is objected to.

## **OFFICERS**

(Sec. 129, 131, UCB Article III Secs. 2 & 3, Ritual 164))

Duties — Sec. 158–162A, 164, UCB Article IV Sec. 5, IB 11–21,  
see Good Standing

see Non-affiliated member

Past Officers — Sec. 143

Titles — Sec. 143

## **OFFICER LISTS**

(Sec. 162 (12))

Following Election of officers, on the form provided by Grand Chapter, the officer list needs to be sent to Grand Chapter no later than November 1<sup>st</sup> for your chapter to be included in the State Roster.

During the year, any change in officers shall be reported on the Officer Change Form (Sec. 162 (11)).

## **OFFICIAL VISIT: WORTHY GRAND MATRON/PATRON**

(Sec. 151, IB 89)

Notice must be given to your chapter members as provided for in Sec. 146. If the Official Visit is the night of a stated meeting, business can be conducted at the Official Visit.

**Expenses:** When the Official Visit of the Worthy Grand Matron includes more than one chapter, all expenses for the Official Visit, including the rent, rehearsal and clean-up, should be paid by the host chapter. Bills should be submitted and audited by that chapter's Audit Committee and included with the chapter's bills. The total expenses should be pro-rated by the Secretary on a membership total basis. An itemized list of expenses should be sent to each chapter in the district. This list would serve as a bill to the other chapters in the district and should be audited and ordered paid at the next stated meeting of the chapter.

**Minutes:** Each Secretary should take their own minutes of the Worthy Grand Matron's Official Visit as they would note which officers were present and be more detailed with their chapter's portion of the Official Visit.

### **ONE-HUNDRED YEAR BIRTHDAY CERTIFICATES**

The Grand Chapter office will provide certificates for members celebrating their 100<sup>th</sup> Birthday signed by the Worthy Grand Matron and Worthy Grand Patron. Request the certificates through the office.

### **OPENING**

(IB 27, Ritual 23)

The Opening of a chapter meeting is part of our Ritual and may not be copied.

When the Secretary and the Treasurer are assuming their stations, they should do the same floorwork. If the Secretary cannot reach her station easily, she/he stands on the floor of the chapter room beside the Marshal. After the gavel sounds, then proceed to the station even if that means walking in front of the Marshal. The Treasurer would do the same thing if the station was not by the Chaplain. She/he would stay on the floor of the chapter room beside the Chaplain until the gavel sounds and then move to the station. The two officers should mirror each other.

### **ORDER FORM/PRICE LIST**

See Supplies

### **OUTREACH**

(Sec. 459A)

Outreach Services may be reached at (877) 637-8274 in California (Toll Free) or email: [outreach@easternstarhomes.org](mailto:outreach@easternstarhomes.org).

The Board of Trustees of the Eastern Star Home may grant Outreach Services only to affiliated members of the Order. The assistance is provided to members who are not residents of the Senior Living Community.

### **PAMPHLETS**

See Books and Pamphlets

### **PAST MATRON/PAST PATRON JEWELS**

See Jewels

### **PER CAPITA**

(Sec. 6 (2), 96)

Chapters must pay the per capita dues voted by the delegates at Grand Chapter Session. Members must pay any assessments by Grand Chapter. These are paid through the chapter along with the members' dues, and if a member does not pay the assessment the chapter must pay the charge. The moneys are sent to Grand Chapter after the per capita bill is sent to your chapter.

For 2009 dues payable by subordinate chapters are:

- Initiation/Affiliation Fee for each new initiate and affiliate \$ 0.50
- Endowment Fund —
  - on each Initiate and Out-of-State Affiliate \$ 15.00
  - on each In-State Affiliate \$ 10.00
- International Headquarters — on each Initiate and first time Affiliate \$ 5.00

The following are payable for each non-exempt member:

- Dues for every member in good standing \$ 4.00
- Home Maintenance Fund \$ 1.00
- Benevolent Fund \$ 0.45
- Convention Fund \$ 0.25
- Scholarship Fund \$ 0.10
- Insurance Fund — this is the estimated amount for 2009, it may increase for 2010 \$ 5.75

The following are payable for every member:

- General Grand Chapter \$ 1.00

Exemptions — Sec. 98

Penalties — Sec. 97

## **PERMANENT AND OTHER RECORDS**

(Sec. 162, IB 14–15)

The following are permanent records of the chapter and should never be destroyed:

Minute Books, Petitions and papers attached thereto (e.g. Requests for Demits, Certificates of Good Standing, Demits, Verifications of Membership), Bylaw Books, which should include notations of membership activity, White Membership Pages, and Annual Reports.

The following should be kept for seven years: (Sec. 162A(2))

Audited bills, Bank statements and cancelled checks, Stubs of check book, dues receipts and Treasurer's receipts, Registers, Roll Call Books, Yellow Cash Pages, Treasurer's Cash Books, State and Federal Payroll Tax forms and Proceedings of the Grand Chapter Sessions.

If the Chapter, the Worthy Matron, or any Committee of the chapter request any books, records, or other property of the chapter, the Secretary or Treasurer shall produce them and give assistance in any matters relating to the affairs of the chapter (Sec. 165).

The Secretary and Treasurer are responsible for the books and their contents that are placed in their charge. They should not leave the possession of the Secretary or Treasurer except when turned over to their successors.

At the Official Visit of the Deputy Grand Matron, she is verifying that the record keeping is being done by the Secretary and the Treasurer and not auditing your books (IB 13). If you would prefer not to bring all the necessary records to the chapter, you could invite the Deputy Grand Matron to meet at your home to examine your records.

## **PETITIONS FOR MEMBERSHIP**

(Sec. 197–204, IB 53, Ritual 165)

Petitions for membership, by initiation, affiliation, or reinstatement can only be received at a stated meeting, including anteroom meetings. You state if the petition is for initiation or affiliation or reinstatement, then read the name, residence, Masonic relationship, Lodge membership (Do not say F. & A. M. Use "Free and Accepted Masons") and names of recommenders, except on reinstatement. On petitions for affiliation also read the name, number and location of former chapter.

All fees must accompany the petitions. Do not collect dues and Home assessment until they are a member of your chapter and have signed the bylaws of the chapter.

With a petition for affiliation you must have a Certificate of Good Standing, a Certificate of Restoration, or a Demit. If the Demit is more than six months old, you must collect six-months dues.

With a petition for plural/dual membership you must have a Certificate of Good Standing, issued within six months of the date presented.

Once you have read the petition, give it to your Worthy Matron. Supply your Worthy Matron with Investigation Committee reports. Be certain she gives you the petition back after the member is balloted upon. Petitions are kept forever and are part of your chapter's permanent file.

Send Notice of Election by Initiation, Affiliation or a Notice of Rejection to the petitioner.

See Affiliation

See Initiation

See Membership

See Objections

See Reinstatement

## **PLANNED GIVING**

The Planned Giving Director has an office at the Senior Living Community and may be reached by calling their number.

## **PLURAL MEMBERSHIP**

(Sec. 191; 239, 249)

Any member in good standing may apply for membership in another chapter in California by presenting a Petition for Affiliation with a Certificate of Good Standing and the payment of the Affiliation Fee. It is handled like any other affiliation petition. Once elected to membership the Secretary of the second chapter must, within 30 days, inform the Secretary of the other chapter of this Plural Membership.

A Plural Member must pay dues and assessments in both chapters. A member who has purchased a Life Sponsorship is exempt from paying the Home Assessment in both chapters.

Fifty-year life membership must be voted by each chapter in order for a member to be exempt from dues in that chapter. So, it is possible that a fifty-year member might pay dues in one chapter and not in the other.

If a Plural Member is suspended in one chapter for non-payment of dues, she/he is **not** automatically suspended in the other chapter.

If a Plural Member resigns from the Order, she/he is automatically resigned from the other chapter (Sec. 239).

If a Plural Member demits from one chapter, she/he is issued a Certificate of Discontinuance of Multiple Membership (Sec. 236). A Notification of Discontinuance of Multiple Membership is sent to the other Secretary.

A Plural Member may not obtain Credentials through both chapters to attend Grand Chapter. A member has only one vote in Grand Chapter. In order to register at Grand Chapter Session, a Plural Member must show the dues card of the chapter from which they received the credentials.

A MEMBER MAY ONLY BELONG TO TWO CHAPTERS ANYWHERE IN THE WORLD.

## **PRICE LIST OF SUPPLIES**

See Order Form/Price List

## **PROCEEDINGS**

(Sec. 111, Rule 16)

No later than April 1<sup>st</sup> of the year following the close of the annual session of Grand Chapter, you should receive one copy of the Proceedings at no cost, to be held as property of the chapter and for the use of its members. The Grand Chapter office will mail this free copy in the form of a computer disk (CD); hard copies can be purchased at the then current cost. These proceedings are to be kept for seven years.

Any members may purchase copies of the proceedings either in book form or on computer disk (CD). You will be informed each year as to the cost.

## **PROFICIENCY CERTIFICATES (CARD)**

(Sec. 159 (8))

On instructions from the Worthy Patron, you will issue Proficiency Certificates, to which you affixed the Seal, to each member who has completed the examination satisfactorily. It should also be noted on the member's membership page.

At the Grand Officers' and Deputy Grand Matrons' Schools each year, the Worthy Grand Patron verifies that each Grand Officer and Deputy Grand Matron is proficient in the secret work. The Deputy Grand Matron then verifies that each Worthy Patron in her district is proficient. Each Worthy Patron can verify the proficiency of the members of his chapter.

Proficiency Certificates are available at no charge from the Grand Chapter office.

## **PROHIBITIONS**

(Sec. 260)

This section of the Constitution and Laws lists rules regarding the Secret Work, using property of Grand Chapter, and on alcoholic beverages.

## **PROPERTY**

(Sec. 169, 253, 254, 256)

A current inventory of all property owned by the chapter is to be maintained and submitted to the chapter by the Property Committee at the first stated meeting following December 1<sup>st</sup>.

Once a year, a form will be sent to the Secretary from the Grand Chapter office that is to be completed listing all property and its value that is owned by the chapter. A copy of the inventory may be attached to this form; however, if the value of the property is not included in the report, it will not be covered under the Grand Chapter insurance policy.

This information is provided to the insurance company and our coverage is based on the information.

## **PRORATED DUES**

(Sec. 246)

For a new member, the dues shall begin with the first day of the month nearest to the date of the signing of the bylaws and shall be prorated for the remainder of the year.

## **PROTOCOL**

The courtesy extended to dignitaries.

See IB 35 for order of protocol

## **QUORUM**

(Sec. 147, IB 7, Ritual 164)

No meeting may be opened or held without the presence of the charter, or a certified copy of the charter, and a quorum. A quorum is seven members, including one of the first four officers. At all meetings which there is balloting upon candidates, a brother who is a member of the chapter must be acting as Worthy Patron.

Lack of a quorum — Sec. 148, 156

## **RECEIPTS**

(Sec. 162 (2); 172, IB 25)

Secretary should stand when reading the Receipts. (See Standing)

All receipts must be itemized and read at the meeting they are received. They are listed in the minutes of the meeting and read at the next meeting. Totals only may not be given. If a Chapter so votes, only the total of the dues and Home Assessments may be read in the minutes of the previous meeting. All other receipts, including interest, must be itemized and read in the minutes.

On the Yellow Cash page, or computer ledger, post the receipts of the meeting. It should agree with the receipt given you by the Treasurer from the Treasurer's Receipt Book.

The Treasurer lists the total of the money received from the Secretary in the Treasurer's Cash Book.

## **RED BOOK**

The Red Book is General Grand Chapter's Laws, Rules and Regulations. Any member may purchase a copy through Grand Chapter.



The Red Book is divided into four parts:

- Constitution — government of Grand Chapters and Subordinate Chapters under General Grand Chapter
- Bylaws — government of Grand Chapters and Subordinate Chapters under General Grand Chapter
- Rules & Regulations — government of Subordinate Chapters under General Grand Chapter
- Instruction — for use of Grand Chapters and Subordinate Chapters under General Grand Chapter

## **REINSTATEMENT**

(Sec. 242, 250)

**Before 6 months:** Pays dues owing and Worthy Matron declares reinstated.

**After 6 months:** When a member, who has been suspended from a chapter for non-payment of dues, wishes to again become a member of the Order, they must first write to the chapter that suspended them and ask to be reinstated.

The Secretary reads the letter at the next stated meeting, and the members vote on the amount of the reinstatement fee. Some chapters ask for the amount owing when the member was suspended. Some ask for the amount of per capita and assessments they had to pay before suspending the member and some ask for one year's back dues. If you ask too much you will lose the member forever.

The Secretary then writes a letter to the former member, states the amount of money needed, and includes a petition for reinstatement. If the amount meets with the approval of the member seeking to be reinstated, she/he will fill out the petition and return it to the Secretary with a check in the amount of money asked for.

At the next stated meeting, the Secretary reads the petition for reinstatement. The chapter accepts the petition, and the Worthy Matron appoints a committee of investigation. If the petitioner lives elsewhere in California, the Worthy Matron would ask the nearest chapter to conduct the courtesy investigation. If the petitioner lives out of the state, the Worthy Matron would ask the Grand Secretary to ask the Worthy Grand Matron of that state to ask a chapter to conduct a courtesy investigation.

After the investigation is completed, the members ballot upon the petition for reinstatement at the next stated meeting. If the ballot is clear, the member is reinstated into the chapter. When the member pays the current dues and assessments, the Secretary shall issue a dues receipt.

If the petition is rejected, the Secretary shall issue a Certificate of Restoration. The chapter retains the fees for reinstatement.

The reinstated member then begins to pay dues and assessment in the chapter, for which they will receive a dues receipt. If the reason for reinstatement was to join another chapter, the member may now ask for a Demit.

## **REJECTION OF A PETITION**

(Sec. 222; 223)

All rejections of petitions shall be entered in the minutes of the meeting. Notice to the petitioner of the rejection shall not be given until after the next stated meeting.

The chapter may vote to ask for a Special Dispensation to re-ballot upon the petition only at the stated meeting at which the petition is rejected or at the next succeeding stated meeting. The vote for this Special Dispensation must be by use of the ballot box (Sec. 206 (2)).

Notice of Rejection is then sent to the petitioner with all moneys and papers that were submitted with the petition. The petition is not returned to the petitioner.

If the petition is withdrawn before it is read in Chapter, it is returned to the petitioner (Sec. 213).

If a petition for initiation is rejected, a new petition may be submitted two months after the rejection. If a petition for affiliation is rejected, a new petition may be submitted at any meeting after the petition was rejected.

If a Petition for Affiliation, for which the petitioner paid six-months dues, is rejected, the Secretary shall return the endorsed Demit along with the fees for affiliation. However, the chapter shall retain the six-months dues, payment of which was endorsed on the Demit. This payment does not place the petitioner in good standing, but allows the petitioner to visit chapters and petition for affiliation for a period of six months without further payment of such dues.

The rejection of a petition for affiliation does not affect the standing in the other chapter.

### **RELIEF COMMITTEE**

(Sec. 170, 402)

The Relief Committee is made up of the top four officers of the chapter. Their duty is to see that fraternal assistance is given to the needy, distressed, and ill members of the chapter.

The amount the Relief Committee may give without a vote of the chapter is in the chapter's bylaws.

### **RELOCATION OF A MEMBER**

When one of your members moves out of the area of your chapter, you shall contact a chapter in the new location informing them of your member and asking them to visit and invite her/him to a chapter meeting. If the member moves into a new jurisdiction, you may send the information to that jurisdiction's Grand Secretary.

There is a form available entitled Notification of Member Relocation, which may be used for this purpose.

### **REMITTANCE ENVELOPES**

At Grand Chapter Session you may pick-up envelopes to send to all of your members in the first mailing of the year from the chapter. There is no cost for these envelopes and you are encouraged to use them. The Secretary may ask any member of the chapter to pick-up the envelopes. If you do not plan to use the envelopes, please tell the Grand Chapter office no later June 30<sup>th</sup> of each year.

### **REPORTS ON PETITIONS**

(Sec. 210–212, IB 21–22)

See Investigation on Petitions

### **REPORTS TO CHAPTER**

(Sec. 182, 251, UCB Article III Sec. 4)

The end of the chapter's fiscal year is September 30<sup>th</sup>, after which the books of the Secretary and Treasurer shall be closed and audited. At the first stated meeting after December 1<sup>st</sup>, after the annual audit of the chapter's books, the Secretary and Treasurer shall make their reports to the Chapter.

The Secretary's report should include the membership count at the beginning of the year, the number of members gained and lost and the membership count at the end of the chapter's year, the number of dues remitted (not the names), and the number who purchased Life Sponsorships in the Eastern Star Home. If your Bylaws provide for Paid Life Memberships, the Secretary's Report must include how many were purchased and the total number the chapter has. List all insurance policies, the amount of coverage and expiration dates; list all bonds, Certificates of Deposit, or other securities that are the property of the chapter, giving purchase price, rate and date of interest and date of maturity. If the Audit Committee does not give the actual figures of income/expenditures against the budget, this should be included in the Secretary's annual report.

The Treasurer's Report shall include the balances in the chapter accounts in the beginning of the prior chapter year, the total of the receipts and expenses for each account, and the balances in the accounts for the chapter year that just ended.

One of the reports should include a breakdown by category of the receipts and expenses during the year.

The chapter committees and trustees, if any, will also make their annual reports at the first stated meeting after installation.

All reports shall be filed in writing with the Secretary when the report is made, and a copy included in the minute book.

## **REPORTS TO GRAND CHAPTER**

(Sec. 162, 251, 252)

**Monthly Reports:** Within 15 days after the end of each month the Secretary shall send to the Grand Chapter office a monthly report on the form provided. It should be typed or printed. It will ask for the membership activity during that month. Just fill in the pertinent information, leave the other spaces blank. List only the Life Sponsorships for which moneys have been sent to Grand Chapter that month. The information requested on this monthly report should be taken from your blue membership page. Note on the blue membership page that you have sent this information to Grand Chapter. The Monthly Report form may be downloaded from our Website, filled out and e-mailed to the office. (Sec. 162 (4))

Use given names not nicknames. All dates, except Date of Death, must be the “Stated Meeting Date” that the action happened. The date of death of a member should be the actual date, if known. The County Recorder’s Office can furnish dates of death. If a member is elderly and you are unable to locate her/him, you may mark her/him “presumed deceased.”

If a member is rejoining your chapter, be sure and check the “Was previously a member of your chapter” box. Otherwise you will be charged \$5.00 for General Grand Chapter’s assessment for the International Temple Fund.

See Deceased/Presumed Deceased

If we do not receive this report, you will receive a reminder letter. After several months without a report from the chapter, a letter will also be sent to your Worthy Matron and the Worthy Grand Matron. Therefore, if you are unable to get a monthly report completed on time, call the office and let us know so that we may work with you.

**Annual Reports:** A computer list of your membership, with their membership numbers, the June Report form, and two copies of the Annual Report are mailed to each chapter in May. The computer list should be current and reflect the information provided from your monthly reports.

Correct any errors or changes of names or address information on the computer list. When marking exempt members (50-year life members, members in charitable homes, members with dementia, and remits), remember a remit of dues must be voted on each year and 50-year life members are only exempt if their anniversary occurs prior to June 30<sup>th</sup>. Return the list as soon as possible. After July 1<sup>st</sup> and no later than July 15<sup>th</sup>, send in the June Monthly Report and one copy of the Annual Report to the Grand Chapter office. The other copy of the Annual Report is to be kept in your permanent file.

After obtaining the signatures of the Worthy Matron and Worthy Patron, the Secretary shall sign the report, affix the chapter seal, and send that copy to the Grand Chapter office. If the Worthy Matron or Worthy Patron are unavailable, the Associate Matron or Associate Patron may sign. If none of them are available, the Secretary should sign the Annual Report and mark that the others were not available to sign.

Per Capita Billing, the July through December Monthly report forms and an updated copy of the membership printout will be mailed to you approximately the first week of August.

Per capita payments not received in the Grand Chapter office by the close of business on September 1<sup>st</sup> are subject to a fine of ten cents per member of your total membership. The Worthy Matron, without a vote of the chapter, can direct the Secretary to make payment of the amount due Grand Chapter. (Sec. 97) The check for the per capita should be for the total amount due only.

If, on the membership printout the initiation date does not agree with your records, research your minutes and bylaw book and then notify Grand Chapter. Remember out-of-state initiation dates will not show on the membership printout, only California initiation dates.

## **REQUEST FOR DEMIT**

See Demit

## **RESIGNATION FROM THE ORDER**

(Sec. 239)

Any member may resign from the Order if their dues are current. In most cases, the member wishes to demit from the chapter rather than resign from the Order, so contact the member and explain the difference.

The request may be made in open Chapter or in writing, signed by the member. They must return their current dues receipt to the Secretary, who will refund the prorated share of dues. They receive no document from the chapter saying that they have resigned. A member who has resigned from the Order must petition for initiation if they wish to rejoin the Order. The Secretary accepting the resignation of a plural/dual member shall immediately notify the other chapter. **Resignation immediately terminates membership in all chapters in the Order.**

While a member, whose request for a demit is granted when she or he is present at a chapter meeting, may still be present at the meeting, a member, who resigns from the Order during a meeting, may not stay in the meeting after the resignation is accepted.

## **RESOLUTIONS (TO AMEND THE CONSTITUTION AND LAWS)**

(Sec. 111 (17), 113–115)

Proposed changes to the Constitution and Laws and the Instruction Book may be made by written resolution filed in the Grand Chapter office, not less than 120 days prior to the opening date of the next session of Grand Chapter.

Ninety days after the close of the annual Grand Chapter Session, eight copies of the approved changes to the Constitution and Laws and the Instruction Book are sent to the chapters for the eight elected officers. The chapters pay for these eight copies.

## **RESTORATION IN THE ORDER**

(Sec. 202; 250 (2))

If a Petition for Reinstatement is rejected, the petitioner is entitled to a Certificate of Restoration in the Order, which shall have the same effect as a Demit for the purpose of a petition for affiliation, or for visitation. The fees paid shall be retained by the chapter.

The rejection does not affect the standing of a plural member in the other chapter.

Enter all rejections in the minutes and in the margin write the suspension date.

## **RÉSUMÉ, MEMBER**

These forms are available from the Grand Chapter office, or on the state web site, <http://www.oescal.org/GCC/forms.htm>. Any member seeking to be of service to our Grand Chapter should fill out a résumé and send it to the Grand Chapter office.

Résumés must be received by June 1<sup>st</sup> to be considered for service the following Grand Chapter year. Résumés will be kept on file for three years. A new résumé may be submitted each year. Résumé forms are available from the chapter Secretary.

## **RÉSUMÉ OF GRAND CHAPTER SESSION**

A summary of the proceedings of the Grand Chapter Session is available two weeks after the close of the Session. It will be posted on the Grand Chapter web site <<http://www.oescal.org>>

## **RIBBONS**

If the Ribbon Ceremony is used for Initiation, the ribbons are to be placed at the Marshal's station and not on the Secretary's desk. (Ritual 49)

Twenty-five, fifty and seventy-five year pins may be presented attached to a piece of five-colored ribbon.

## **RITUALS**

(Sec. 254; 255, Ritual 165)

Each chapter is issued three large-print burgundy Rituals for the use of the Worthy Patron, Associate Patron, and Conductress. These are property of the Grand Chapter; and, if lost, the fine is \$50 to replace the Ritual. Each Ritual is numbered on the inside cover and that number is recorded on the chapter's record at Grand Chapter. When requesting a replacement, indicate for which officer when paying the fine.

If your chapter consolidates, the three Rituals for all but one of the chapters must returned to the Grand Chapter office.

As the Rituals are the property of the Grand Chapter, the Deputy Grand Matron should check that your chapter has all three each year at her official visit to your chapter.

A chapter may purchase Rituals for the use of the other officers. Such books must be returned to the Worthy Matron at the expiration of their term of office.

Any member in good standing may purchase a copy of the Ritual through the Secretary. The Ritual shall be surrendered to the Secretary of any chapter demanding it, if the owner loses her/his good standing in the Order (Sec. 255).

Rituals are also available in Spanish and in Braille.

Old Rituals may just be thrown away.

## **ROBERT'S RULES OF ORDER**

(Sec. 31)

The Robert's Rules of Order Newly Revised, 10<sup>th</sup> Edition, governs the proceedings of Grand Chapter and the subordinate chapters when not provided for in the Constitution, Laws, Rules and Regulations of the Grand Chapter or the bylaws of a subordinate chapter.



## **ROB MORRIS AWARD**

(Sec. 79A)

A chapter may voluntarily participate in the Dr. Rob Morris Award program for recognition of outstanding service to the chapter. The recipient must be a member of the chapter giving the award. Only one such award may be given in any year.

A form is provided, for the chapter to request a Rob Morris Award for one of its members who has not previously served in the capacity of a Worthy Matron or a Worthy Patron. The Secretary should send in the request at least one month before presentation, giving name of recipient, membership number and date of presentation. The chapter must purchase a charm or a tie tack to be presented with the certificate, from the Grand Chapter office.

The date of the presentation should be so noted on the member's membership page.

## **ROB MORRIS MEMBERSHIP PROGRAM**

This is a General Grand Chapter award program for signers on petitions. Contact California's Membership Committee Chairman, who is listed in the State Roster, for information.

## **ROLL CALL**

(IB 23)

Secretary should stand when reading the roll of officers (See Standing)

The roll of officers is to be called each meeting except short form meetings. Call the name of the office and the name of the 18 installed officers, and note their presence in the Roll Call Book, purchased from the Grand Chapter office. Do not call the names of the Flag Bearer, Prompter, etc.

The records should show the regular officer present, even if acting as a pro tem officer in another station. The records should also show that an officer marked absent arrived late.

The Roll Call book shall be kept for seven years. The membership page of the officer shall show the office held each year.

## **ROSTER, STATE**

Each chapter Secretary will be sent a Roster of all chapters in California, at no cost, when they are available at the beginning of the year. All other members may purchase a copy of the Roster through the Secretary.

The information for this Roster is requested on a form sent to you during September and must be returned no later than November 1<sup>st</sup>. The address of the Secretary on this form will be the address we will use to send mail and United Parcel items to the chapter, unless advised otherwise.

Any resignation or change of name or address of the officers listed in the Roster should be given immediately to the Grand Secretary on the Change of Officer form.

The index of the State Roster should be reviewed as the contents of the roster may answer your question and save a phone calls to the Grand Chapter office.

Each chapter may have its own roster of its membership.

## **SCHOLARSHIP FUND**

(Sec. 88)

See Applications for Assistance.

## **SEAL**

(Sec. 125)

Every chapter shall have a seal with its name, number and location of the chapter. The seal is purchased through the Grand Chapter office. No communication or document is deemed authentic without the seal of the chapter.

The seals are available in hand held models and in desk type models, and may also be obtained as rubber stamps.

## **SECRET WORK**

(Sec. 254, 260, Ritual 165)

Each chapter has been given by Grand Chapter four copies of the uncoded Secret Work for the use of the Worthy Patron, Associate Patron, Conductress, and Associate Conductress. These shall be returned to the Worthy Matron by such officers on expiration of the terms of office. No other member or officer may have a copy of the Secret Work, except the Deputy Grand Matron who returns the copy to the Grand Secretary at the end of her term.

If the Secret Work is lost, there is a fine of \$25.00 to replace it. When paying the fine, indicate for which officer the replacement is needed. If the Secret Work becomes dirty or worn, it will be replaced, at no cost, when it is returned to the Grand Secretary's office. There is a large-print version of the Secret Work which is available for a small charge.

As the Secret Work is the property of Grand Chapter, the Deputy Grand Matron must check it each year at her Official Visit to your chapter.

No member of the Order shall write any portion of the Secret Work for any purpose (Sec. 260).

### **SERVICE AWARD**

(Sec. 79B)

Chapters may participate in this program that gives recognition to a sister or brother of the chapter for special service. A Past Matron or a Past Patron is eligible to receive the award. There is no restriction on the number of awards presented during the year.

The method of selecting recipients and the manner of presentation is determined by the chapter.

An award certificate and pin shall be purchased through the Grand Chapter office.

### **SEVENTY-FIVE YEAR PIN AND CERTIFICATE**

(Sec. 195, IB 103)

A 75-year pin and certificate are available at no cost from the Grand Chapter office for any member who has established a record of 75 years of good standing in the Order. These may be presented at any convenient time beginning with the calendar year in which the 75 years of membership is attained.

A member receiving her/his 75-year pin at a Chapter meeting should be escorted to the East, given Grand Honors, and be asked to remain in the East for the remainder of the meeting.

Upon approval by a 2/3 majority vote of the chapter, the Secretary shall request the certificate and pin in writing from the Grand Chapter office, giving the member's name and membership number.

It should be noted on the member's membership page when the presentation of the 75-year pin and certificate is made.

See Ceremony — IB 103

## **SOCIAL CLUBS**

(Sec. 178, UCB Article VI Sec. 4)

A chapter may have under its jurisdiction clubs that act as ways and means groups of the chapter. Such clubs may sponsor activities for the purpose of raising funds to augment the fixed revenue of the chapter. The net proceeds of all money raising functions sponsored by the club shall be turned over to the Secretary within 60 days following the event, with a statement of receipts and expenditures. An amount not to exceed \$1,000.00 may be retained by the club for working capital, if needed.

## **SPECIAL DISPENSATIONS**

(Sec. 100, 205 209, IB 7)

There is a form that is available from the Grand Chapter office to be used when requesting a Special Dispensation. The \$5.00 cost of some Special Dispensations is set in the C&L. (Sec. 100)

Do not modify the Special Dispensation form to request a special dispensation that is not listed. If you require permission for an action that is not listed on the form, please write a letter to the Worthy Grand Matron, and send it to the Grand Chapter office. Note: you do not need a special dispensation to ballot and affiliate at the same meeting.

When requesting Special Dispensations for the following, the ballot box must be used. The vote is carried only by ballot containing less than three cubes:

- To ballot and initiate at the same meeting. A Special Dispensation is not needed to ballot and affiliate at the same meeting;
- To re-ballot upon a rejected petition for initiation;
- To receive a petition for initiation of a petitioner who resides in a Grand Jurisdiction other than California and not more than 25 miles by airline from the California border, after a Waiver of Jurisdiction has been received.

Special Dispensations for the following only require a motion carried by majority vote:

- To hold the Annual Election of Officers other than the first stated meeting in October. A Special Dispensation is not needed for a Special Election;
- To hold the Annual Installation of Officers after the 30<sup>th</sup> of November;

- To contribute more than \$500.00 a year to each Masonic youth organization;
- To contribute more than \$200.00 a year to any other youth organization;
- To contribute to any fraternal organization or to any fraternal hall association for any purpose. The amount of the proposed contribution must be specified in any request for a Special Dispensation.
- To change the place of any stated meeting from the location stated in the bylaws.

A Special Dispensation cannot be granted to dispense with a meeting. Meetings must be held as stated in the chapter's bylaws, unless there is a lack of a quorum, which consists of seven members, including one of the first four officers that are Worthy Matron, Worthy Patron, Associate Matron, Associate Patron.

### **SPECIAL ELECTION**

(Sec. 134 (6), 135, 142)

See Election of Officers

### **SPECIAL MEETING**

(Sec. 145, 146, Ritual 164, Red Book Instruction 9)

See Meetings

### **STANDING**

The Secretary shall stand whenever addressed by the Worthy Matron. Then, you may be seated while reading the minutes, correspondence, receipts or bills if the microphone placement allows the members to hear more clearly. The Secretary should continue to stand when finished, until that order of business is completed.

### **STANDING RULES**

Standing Rules are rules dealing with the administration of the chapter and can be adopted or changed like any other act of the chapter. To adopt a new rule requires a majority vote. To modify or repeal a rule requires either a two-thirds majority vote or notice to the membership and a majority vote. Standing Rules may be suspended by a majority vote.

Standing rules are not part of a chapter's Bylaws.

## **STARCARE**

(Sec. 440)

StarCARE exists to serve as a resource to assist members in need of assistance from California Eastern Star charities, funds, and programs. 1-800-567-CARE (2273).

## **STAR-PLUS PROGRAM**

(Sec. 466 A, B)

A contribution of \$50.00 or more to the Endowment Fund, beyond a Life Sponsor Membership, entitles the member to recognition with a Star-Plus Certificate. Acknowledgment cards are provided at no cost from the Grand Chapter office.

The Endowment Fund Committee will issue a Star Plus Certificate of recognition to be presented to the member. The form to order this certificate is obtained from the Endowment Fund Committee. The Endowment Fund Committee will need the names of the members who have attained Star-Plus status.

It should be noted on the member's membership page that the member has Star-Plus recognition. A member will receive a Star Plus Certificate and a gold seal will be presented for subsequent donations.

See Endowment Fund Committee

## **STATED MEETINGS**

(Sec. 144)

See Meetings

## **SUBSIDIARY ORGANIZATIONS**

(Sec. 178, UCB Article IV Sec. 4)

See Social Club

## **SUMMARY OF BILLS**

This is a form to list the expenditures of a meeting either by bills presented or votes of the chapter to pay for an item. The chapter's audit committee may audit the bills on this form. After chapter, the Secretary should give a copy of this form to the Treasurer to pay the listed bills.

The Treasurer would enter each expenditure in the Treasurer's Cash Book, write the necessary check, note the check number by each item and return the Summary of Bills to the Secretary.

See Bills

## **SUMMARY OF RECEIPTS**

This is a form to list receipts of a meeting.

## **SUPPLIES**

(Sec. 253 255)

Chapters shall use the forms, books and records adopted by the Grand Chapter and listed on the Order Form/Price List.

Four uncoded copies of the Secret Work, as printed and distributed by General Grand Chapter, are provided to the chapter for the Worthy Patron, Associate Patron, Conductress and Associate Conductress. These are numbered and are the property of the Grand Chapter. If damaged, they will be replaced, free of charge, with the return of the old copy. If lost, there is a fine of \$25.00 for each item.

Three large-print Rituals are provided to the chapter, for the Worthy Patron, Associate Patron, and Conductress. These are numbered and property of the Grand Chapter. If lost, there is a fine of \$50.00 for each item.

A chapter may purchase Rituals, Instruction Books, and Constitution and Laws for the use of the officers. Such books must be returned to the Worthy Matron at the expiration of their term of office.

At the expiration of the Worthy Matron's term of office, she will turn over to her successor, the four copies of the uncoded Secret Work, the three large-print Rituals, the Instruction Books, and Constitution and Laws, together with an inventory of all properties of the chapter. She will receive a receipt from the new Worthy Matron for these items and will file it with the Secretary (Sec. 158 (15)).

Any member may purchase a Ritual, Instruction Book, or Constitution and Laws. The member is required to keep the Instruction Book and the Constitution and Laws current by purchasing the amendments adopted at Grand Chapter.

One Roster and one Proceeding will be sent to the Secretary, at no charge, for the use of the chapter. Any member may purchase the Roster and the Proceeding by ordering them through the Secretary. You will be advised of the price each year.

The Grand Chapter office supplies forms; some may be downloaded from the website. Do not use old forms. Destroy the old forms when the office sends a replacement. The date of the last revision appears on the lower corner of the forms.

When you overpay for a supply, you may be issued a Credit Memo, which is good for two years.

## **SUSPENSION**

(Sec. 249)

The Constitution and Laws allows a chapter to suspend a member who has not paid dues for a period of six months (January 1 through June 30) from the close of the calendar year in which payment was due. The member may be suspended on July 1<sup>st</sup>. However, because the chapter must still pay per capita on that member on June 30<sup>th</sup>, use the extra time to the following June 30<sup>th</sup> to make contact with that member to try and bring the dues current.

If the chapter has remitted dues for that year, the member may not be suspended.

Your Worthy Matron should be advised of the members who are delinquent and, at her direction, the members are notified of the intended suspension. Send a Notice of Delinquent Dues to the last known address of the member by mail with a return receipt requested. Give them one month or longer in which to respond. If the member fails to pay the dues by the time specified in the notice, or to furnish a reason why she/he cannot pay the dues, the Secretary shall read the name of the delinquent member in open Chapter and the Worthy Matron shall declare the member suspended. A “Notice of Suspension for non-payment of dues or assessments” is then mailed to the suspended member.

If the mail is returned undeliverable by the Post Office, keep the envelope as your proof that you tried to contact the member.

The suspension should be noted on the member’s membership page. Attach the signed receipt or the returned envelope to the membership page.

Plural members are **not** automatically suspended in the other chapter.

Dual members, who are suspended from a chapter in another jurisdiction for non-payment of dues or other cause, are automatically suspended from their chapter in this jurisdiction. The “Notice of Suspension of a suspended dual member” should be used to inform the member of the suspension.



If a dual member is suspended from a chapter in California, the Secretary of the chapter shall immediately advise the Secretary, of the chapter in the other jurisdiction in which membership is held, of such suspension. The “Notification of Suspension of Dual Member” may be used for this purpose.

This information is given to the Grand Chapter office on the Monthly Reports.

See Reinstatement

See Timeline for Suspension of Members in Appendix G

## **TAX INFORMATION**

Every chapter that pays salaries to their Secretary, Treasurer, Organist, Set-up, etc. must pay Federal taxes, and if more than \$100 total salaries per quarter, State taxes must also be paid.

See Appendix B

## **TELLERS**

(Sec. 134 (4), IB 87)

If there is more than one nominee for any elective office, the Worthy Matron shall appoint three tellers to take charge of and count the ballots. The tellers are stationed between the Altar and the East. The voting members will count off so that the total number of ballots is known.

All members, except the Worthy Matron, Worthy Patron, Warder, and any member physically unable to walk to the ballot box, will step to the nearest side line and square the chapter room on the south, east, north and west lines, in a direction from south to north. They cast their ballots and return to their seats. The tellers count aloud as the members' ballots are deposited.

## **TIMELINE**

See Appendix C

## **TREASURER'S CASH BOOK**

(Sec. 253)

The Treasurer will record all deposits and expenditures in the Treasurer's Cash Book.

## **TREASURER'S RECEIPT BOOK**

(Sec. 253)

The Treasurer will issue a receipt from the Treasurer's Receipt Book to the Secretary for all money turned over from the Secretary.

## **TRUSTEES**

(Sec. 163, UCB Article III Sec. 4)

Trustees, if provided for in the chapter's bylaws, shall be elected in the same manner as the elective officers. Any officer or member in good standing, except the Worthy Matron, Secretary, and Treasurer are eligible. The duties shall be prescribed by the chapter's bylaws in accordance with the Constitution and Laws.

## **TWENTY-FIVE YEAR PIN AND CERTIFICATE**

(Sec. 195)

Your chapter may vote ( $\frac{2}{3}$  majority) to provide for the presentation of a 25-year pin and/or certificate to its members when a record of 25 years membership, in good standing, is established by the member. The membership must be verified by the Secretary of the chapter.

If the chapter does not elect to purchase the 25-year pin, the member may buy their own pin. The pins and certificates are purchased from the Grand Chapter office.

This may be presented at any convenient time beginning with the calendar year in which the 25 years of membership is attained.

It should be noted on the member's membership page when the presentation of the 25-year pin and/or certificate is made.

## **UNIFORM CODE OF BYLAWS**

(Sec. 126)

Changes to the Uniform Code of Bylaws are the responsibility of the joint Committees on Constitution and Bylaws and Jurisprudence.

All chapters adopting a new code of bylaws shall adopt the provisions of the Uniform Code of Bylaws.

## **VACANCIES IN OFFICE**

(Sec. 140–142)

Vacancies in an office shall occur by death, deprivation, suspension or termination of membership in the chapter, non-attendance or resignation.

A Special Election shall be held within sixty days of a vacancy in elective office. Notice must be given in accordance with Section 146.

Vacancies in appointive offices may be filled by the Worthy Matron at a stated meeting.

See Leave of Absence — Sec. 141

See Non-Attendance — Sec. 141

See Resignation — Sec. 140

See Special Election

## **VERIFICATION OF MEMBERSHIP**

The Verification of Membership (VoM) is a form used by the Secretaries to verify membership on a member affiliating from out of the jurisdiction. The verification is required in order to validate the years a member has been a member in the Order.

A Demit will not contain the necessary information. It will not show whether a member has been out of the Order for a period longer than six months. The time out of the Order is subtracted from the number of years she/he has been member.

Send a copy of this information to the Grand Chapter office when requesting a 25, 50, or 75-year pin for the member.

## **VISITATION**

(Sec. 243, 258, IB 5)

Every member of the Order in good standing has a right to visit any chapter. The Worthy Matron may request visitors to retire during the course of a meeting.

No child two years of age or over shall be permitted in the chapter room during the session of the chapter.

See Objection to a Visitor Sec. 243

## **VOTING**

(Sec. 133, 134 (3), (5))

When there is only one nominee for any office, the ballot may be dispensed with and the nominee elected by a motion properly made, seconded and carried. (Sec. 134 (3)) If there is only one nominee for the office, the Worthy Matron may say, "If there be no objection, I declare Sister/Brother \_\_\_\_\_ elected to the office of \_\_\_\_\_ for the ensuing year."

A blank ballot is not counted toward the total voting. A ballot for any eligible person, for the office currently being elected, is counted even if the person has not been nominated.

All members not under suspension are entitled to vote.

See Balloting

See Tellers

## **WAIVER OF JURISDICTION**

(Sec. 196; 204, 206)

After a Special Dispensation has been obtained, a petition for initiation may be received from one who resides in a Grand Jurisdiction other than California and not more than 25 miles by airline from the California border. A Waiver of Jurisdiction is required and obtained from either the Grand Chapter or subordinate chapter of the other Jurisdiction in whose territorial jurisdiction the petitioner resides.

The request for the Waiver of Jurisdiction shall be applied for through the Grand Secretary's office.

A petition that requires a Waiver of Jurisdiction shall not be referred to an Investigation Committee until the Waiver of Jurisdiction has been received.

See Courtesy Investigation

## **WEB SITE**

<http://www.oescal.org>

The Web Site Committee is a Standing Committee and those serving on that committee may be found in the State Roster.

Many of our Grand Chapter forms may be downloaded from the site including the Scholarship form beginning in November of each year.

# CHAPTER FORMS

## Miscellaneous Forms

To all members  
of the

Order of the Eastern Star



From: The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_

### This: Certificate of Good Standing

Certifies that \_\_\_\_\_, whose signature appears below, is a member in good standing of \_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_, California. She/He has paid all dues and assessments through \_\_\_\_\_ and is free from all charges. This member bears the fraternal regard of the Officers and Members of this Chapter, who recommend her/him to the fellowship and protection of all members of the order.

**Member's History:** California Member No. \_\_\_\_\_

On \_\_\_\_\_, this member joined \_\_\_\_\_ Chapter No. \_\_\_\_\_ located at \_\_\_\_\_ by Initiation/Affiliation.

That Chapter has become \_\_\_\_\_ Chapter No. \_\_\_\_\_ located at \_\_\_\_\_ through consolidation/name change.

Membership was continuous:  Yes  No If no, state reasons and give dates: \_\_\_\_\_

She/He is also a member of \_\_\_\_\_ Chapter No. \_\_\_\_\_ located at \_\_\_\_\_, and, as such, is a dual/plural member.

Life Sponsor of the Eastern Star Home in California?  Yes  No

Served as Worthy Matron/Worthy Patron: \_\_\_\_\_

Other offices held: \_\_\_\_\_

Awards received: \_\_\_\_\_

Additional membership information: \_\_\_\_\_

Additional membership history, if available, may be listed on the reverse.

Given under my hand and the seal of the Chapter  
this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_

(Seal)

\_\_\_\_\_  
Member

\_\_\_\_\_  
Secretary

In California, a Certificate — or letter — of Good Standing may only be used for affiliation within six months of its issuance. Affiliation with a new chapter does not automatically terminate membership in the original chapter. Termination of

membership in a Chapter may only be accomplished in writing, signed by the member, or verbally, in person, at a stated meeting. One may be a member of, at most, two chapters.

01/01/2004      last change 07/16/2004

Certificate of Good Standing  
(Mandatory)

## APPROVAL OF AMENDMENTS TO BYLAWS

\_\_\_\_\_, Chapter No. \_\_\_\_\_, O.E.S., \_\_\_\_\_, California,  
\_\_\_\_\_, 20\_\_.

To: \_\_\_\_\_, Worthy Grand Matron

I, \_\_\_\_\_, Secretary of \_\_\_\_\_ Chapter No. \_\_\_\_\_, O.E.S., do hereby certify that at a stated meeting of the Chapter, held on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_, the attached amendments to the Bylaws were proposed in writing, read in open Chapter, and set for consideration at the stated meeting of \_\_\_\_\_, 20\_\_, and after special notice thereof to the members, the same were, by favorable vote of 2/3 of the members present and voting, regularly adopted on \_\_\_\_\_, 20\_\_.

<p style="text-align: center;">(Please check appropriate items below.)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Change meeting location</li> <li><input type="checkbox"/> Change meeting dates</li> <li><input type="checkbox"/> Change/add meeting exceptions</li> <li><input type="checkbox"/> Change meeting time</li> <li><input type="checkbox"/> Change/add anteroom meeting time</li> <li><input type="checkbox"/> Change/add/delete tenure for Secretary/Treasurer</li> <li><input type="checkbox"/> Change fees</li> <li><input type="checkbox"/> Change dues</li> <li><input type="checkbox"/> Change relief amount</li> <li><input type="checkbox"/> Provide for/delete/change paid life membership</li> <li><input type="checkbox"/> Provide for/delete Trustees</li> <li><input type="checkbox"/> Other: _____</li> </ul>	<p><i>Committee Use Only</i></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"><i>Approved</i></td> <td style="width: 50%;"><i>Not Approved</i></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	<i>Approved</i>	<i>Not Approved</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Wherefore, I transmit the same to you for approval.

(Seal)

\_\_\_\_\_, Secretary

*Note: See Sec. 128 of the Constitution and Laws. You must submit the following: (1) one copy of the sections before amended, (2) two copies of the section as amended, and (3) two certified (sealed) originals of this form.*

The attached amendments referred to above are hereby approved this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

(Seal)

\_\_\_\_\_, Worthy Grand Matron

<b>Office Use Only</b>		
Date Received in GC Office	Date Sent to C&B Committee	Date Received from C&B Comm.
Date Sent to WGM	Date Received from WGM	Date Sent to Chapter
<small>68/10/2006 10/13/2006/02/2006</small>		No. _____

Approval of Amendments to Bylaws

**APPROVAL OF BYLAWS OF A CONSOLIDATING CHAPTER**

To be \_\_\_\_\_ Chapter No. \_\_\_\_\_, O.E.S.  
 \_\_\_\_\_, California. \_\_\_\_\_, 20 \_\_\_\_\_

TO: \_\_\_\_\_, Worthy Grand Matron

I, \_\_\_\_\_, Secretary (elect)  
 do hereby certify that at a meeting of

\_\_\_\_\_ Chapter No. \_\_\_\_\_ and  
 \_\_\_\_\_ Chapter No. \_\_\_\_\_ and  
 \_\_\_\_\_ Chapter No. \_\_\_\_\_ and  
 \_\_\_\_\_ Chapter No. \_\_\_\_\_

held on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, the bylaws were proposed in writing, read, and adopted by a favorable 2/3 vote of the members present and voting; the membership having received proper notice of this meeting. These adopted bylaws will become the bylaws of the consolidated Chapter upon approval of the Worthy Grand Matron and with the Installation of Officers held on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Wherefore, I transmit the same to you for approval.

(Chapter Seal) \_\_\_\_\_ Secretary

These bylaws are hereby approved this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

(Seal) \_\_\_\_\_ Worthy Grand Matron

(One copy of each Chapter's bylaws and two copies of the Consolidated Chapter's bylaws, using the Uniform Code form, must accompany two copies of this form.)

<b>Office Use Only</b>			No. _____
Date Received in GC Office	Date Sent to C&B Committee	Date Received from C&B Committee	
Date Sent to WGM		Date Received from WGM	Date Sent to Chapter

2008/05/05 jh for change 2008/05/05

Approval of Bylaws — Consolidating

# *Fraternal Greetings*

\_\_\_\_\_ Chapter No. \_\_\_\_\_, Order of the Eastern Star,  
\_\_\_\_\_, California

To the Worthy Matron, Officers, and Members of \_\_\_\_\_ Chapter No. \_\_\_\_\_

We extend fraternal greetings and best wishes, and we are happy to advise you that on \_\_\_\_\_,

the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, Sister/Brother \_\_\_\_\_

of your Chapter honored us with a visit.

(seal)

\_\_\_\_\_  
Secretary

09/20/2005 list change 03/20/2007

Fraternal Greeting  
Visiting Certificate





## Notice of Special Election

Date: \_\_\_\_\_, 20\_\_\_\_  
From: \_\_\_\_\_ The Office of the Secretary of \_\_\_\_\_ Chapter No. \_\_\_\_\_ O.E.S.  
To: \_\_\_\_\_

In accordance with Section 135 of the Constitution and Laws of the Grand Chapter of California, you are hereby notified that this Chapter will hold a Special Election of officers at its stated meeting on \_\_\_\_\_, 20\_\_\_\_, at \_\_\_\_\_ AM/PM.  
The meeting will be held at: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Fraternally,

Secretary

(Seal)

## Notice of Special Election



## Notice of Annual Election

Date: \_\_\_\_\_, 20\_\_\_\_  
From: \_\_\_\_\_ The Office of the Secretary of \_\_\_\_\_ Chapter No. \_\_\_\_\_ O.E.S.  
To: \_\_\_\_\_

In accordance with Section 130 of the Constitution and Laws of the Grand Chapter of California, you are hereby notified that the Annual Election of Officers for this Chapter will be held at: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

on \_\_\_\_\_, 20\_\_\_\_, at \_\_\_\_\_ AM/PM.  
Please note that dues and assessments in the amount of \$ \_\_\_\_\_ will become due and payable on January 1, 20\_\_\_\_.  
 Your dues and assessments totaling \$ \_\_\_\_\_, for the \_\_\_\_\_ years \_\_\_\_\_, are still owing.

Please remit your payment promptly. If you cannot pay your dues, for any reason, please contact the Worthy Matron, Worthy Patron, Associate Matron, Associate Patron, or Secretary.

Fraternally,

(Seal)

Secretary

## Notice of Annual Election (optional)

# Order of the Eastern Star



## Notification of Member Relocation

Date: \_\_\_\_\_

From: The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_, California

To: The Officers and Members of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_

Please take notice that our member, Sister/Brother \_\_\_\_\_,  
California member number \_\_\_\_\_, has moved into your area. Would one of your members  
please contact our member, welcome her/him, and invite her/him to attend your Chapter.

Our member's contact information is as follows:

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City, State Zip)

\_\_\_\_\_  
(Telephone) (Email)

It is our hope that by your contacting our member and by making her/him feel welcome, she/he will  
continue to enjoy the benefits of our beautiful Order. Thank you for your cooperation and assistance.

\_\_\_\_\_  
Secretary

(s)

Section 162(s) requires the Secretary, or a member  
designated by the Secretary, when a member moves out of  
the area, to notify the Chapter Secretary in the area where  
the member has relocated. If the member moves out of the  
Jurisdiction, the information can be sent to the Grand  
Chapter into whose jurisdiction the member has moved.

07/03/04 1st change 06/28/04

Notification of Member Relocation

## Request for Insurance Rider

If you are signing a contract, the Insurance company requests that you send a copy of the contract to them before it is signed. If the landlord/rentor/leasor requires that they be listed as an additional insured, you **must** contact the insurance company before signing any contract.

Chapter Name & Number / Group Name: \_\_\_\_\_

Contact Information:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

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

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Event: \_\_\_\_\_

Location of Event: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Description of Event:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Additional Insured / To whom the proof of insurance is to be sent:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Certificate to be mailed , or faxed . Fax number \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature:

Please mail or fax this form to our Insurance Carrier:

(Seal)

Thompkins Masonic Insurance Program — 1150 Marina Village Pkwy., Ste. 101, Alameda, CA 94501-1080  
Phone: (510) 814-4141; Fax: (510) 814-4144

2004/11/01 jrh

last change 2008/05/06

## Request for Insurance Rider

# Order of the Eastern Star



## Notification of Plural or Dual Membership

From: \_\_\_\_\_ The Office of the Secretary of  
Chapter No. \_\_\_\_\_ of \_\_\_\_\_, California

To: \_\_\_\_\_ The Officers and Members of  
Chapter No. \_\_\_\_\_ of \_\_\_\_\_

Please take notice that Sister/Brother \_\_\_\_\_,  
California member number \_\_\_\_\_, became a plural/dual member by signing the bylaws of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_, California,  
on \_\_\_\_\_.

I will keep you up to date on any changes in this membership, and I would appreciate it if you would do the same for me.

Given under my hand and the seal of the Chapter  
this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

(b6)

\_\_\_\_\_  
Secretary

In California, a *dual member* is a member of both a chapter under the jurisdiction of the Grand Chapter of California, and a chapter outside of California (see Section 192 of the Constitution and Laws for further information). A *plural member* is a member of two chapters under the jurisdiction of the Grand Chapter of California (see Section 191 for further information).

A dual member who is suspended from the Chapter in another jurisdiction is automatically (upon notification of the suspension) suspended from the Chapter in California. If a dual member is suspended in California, the Secretary of the Chapter suspending the member, shall notify the other Chapter of the member's suspension. (see Section 249 under the heading "Dual Member" for further information).

Section 191 requires that notice be sent within 30 days of the election of a member to plural membership. This also applies to the election of a member to dual membership.

oyle004a bar change 07/16/04

## Notification of Plural or Dual Membership

# Order of the Eastern Star



## Notification of Discontinuance of Multiple Membership

From: The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_, California

To: The Officers and Members of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_

Please take notice that Sister/Brother \_\_\_\_\_,  
California member number \_\_\_\_\_, who became a plural/dual member by  
affiliating with \_\_\_\_\_ Chapter No. \_\_\_\_\_ of  
\_\_\_\_\_, on \_\_\_\_\_, has  
discontinued her/his membership in \_\_\_\_\_ Chapter No. \_\_\_\_\_  
of \_\_\_\_\_, California.

Given under my hand and the seal of the Chapter  
this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

(cont)

\_\_\_\_\_  
Secretary

In California, a dual member is a member of both a chapter under the jurisdiction of the Grand Chapter of California, and a chapter outside of California (see Section 192 of the Constitution and Laws for further information). A plural member is a member of two chapters under the jurisdiction of the Grand Chapter of California (see Section 191 for further information).

When a multiple member (dual/plural) discontinues her/his membership in a chapter, she/he receives a *Certificate of Discontinuance of Multiple Membership* rather than a *Demit* (Section 236, 9th paragraph). In addition to the certificate sent to the (former) member, this notice is to be sent to her/his other chapter; informing them of the change in membership.

08/01/00a      her change of notice

## Notification of Discontinuance of Multiple Membership

## CHECK TRANSMITTAL FORM

Mail to: 16960 Bastanchury Rd., Ste. E, Yorba Linda, CA 92886-1711 Date: \_\_\_\_\_ Chapter No. \_\_\_\_\_

**Check No.** \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ payable to **CALIFORNIA EASTERN STAR FOUNDATION** for:  
 (These donations **ARE TAX DEDUCTIBLE**. *Chapter Secretary will do the acknowledgement.* If an individual is making a donation of \$250.00 or more, it must be a personal check made out to the **CALIFORNIA EASTERN STAR FOUNDATION**.)

	\$	In Honor/Memory of:	Acknowledgement Sent by Secretary:
Benevolent Fund	\$ _____	_____	_____
Disaster Fund	\$ _____	_____	_____
J. Clifford Lee Memorial Cancer Fund	\$ _____	_____	_____
Marguerite Rennie Memorial Fund	\$ _____	_____	_____
Eastern Star Patient Comfort Program Fund	\$ _____	_____	_____
Scholarship (Cashion, ESTARL, Campbell-Dillon, Loyal Stark, Music, Endowment, General)	\$ _____	_____	_____
Gerald P. Cashion Fund	\$ _____	_____	_____
Cancer Research Fund (2009 WGM Project)	\$ _____	_____	_____
Grand Chapter Heart Fund	\$ _____	_____	_____
Medical Research Fund	\$ _____	_____	_____
Relay for Life	\$ _____	_____	_____

**Check No.** \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ payable to **GRAND CHAPTER ENDOWMENT FUND** for:  
 (These donations **ARE TAX DEDUCTIBLE**. *Chapter Secretary will do the acknowledgement.* If an individual is making a donation of \$250.00 or more, it must be a personal check made out to the **GRAND CHAPTER ENDOWMENT FUND**.)

	\$	In Honor/Memory of:	Acknowledgement Sent by Secretary:
Home Endowment Fund — RESTRICTED	\$ _____	_____	_____
Home Endowment Fund — UNRESTRICTED	\$ _____	_____	_____
Life Sponsorship (\$50.00)	\$ _____	See Green Form enclosed.	_____
Star Plus (\$50.00)	\$ _____	See Green Form enclosed.	_____
Tree of Life	\$ _____	Inscription information enclosed.	_____

**Check No.** \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ payable to **EASTERN STAR HOMES OF CALIFORNIA** for:  
 (These donations **ARE TAX DEDUCTIBLE**.)

Holiday Fund	\$ _____		
Fiesta	\$ _____	Booth: _____	_____
General Donation	\$ _____	_____	_____

**Check No.** \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ payable to **GRAND CHAPTER OF CALIFORNIA** for:

Supplies	\$ _____	See Order Form enclosed.	
25-Year or 50-Year Request	\$ _____	See Order Form enclosed.	_____
Rob Morris/Service Awards	\$ _____	See Order Form enclosed.	_____
Credentials	\$ _____	See Order Form enclosed.	_____
Miscellaneous	\$ _____	_____	_____
Perpetual Income Fund of Grand Chapter	\$ _____	_____	_____

(These donations are **NOT TAX DEDUCTIBLE**.)

**BE SURE EACH CHAPTER CHECK HAS TWO SIGNATURES AND THAT AMOUNTS AGREE.  
 ALTERED OR INCORRECTLY WRITTEN CHECK WILL BE RETURNED.**

Front: \_\_\_\_\_ Chapter No. \_\_\_\_\_  
 \_\_\_\_\_, Secretary

Check Transmittal  
 Transmittal, Check

2007/12/03 -jrh last change 2008/11/04

**VERIFICATION OF MEMBERSHIP**

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

From: \_\_\_\_\_ Chapter No. \_\_\_\_\_, Order of the Eastern Star  
\_\_\_\_\_, California

To: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



Dear: \_\_\_\_\_

We are requesting verification of the membership record for:

SISTER/BROTHER \_\_\_\_\_

Former names: \_\_\_\_\_

California Member number: \_\_\_\_\_, formerly/currently a member of your jurisdiction and currently a member of the Order in California. Her/His birth date is \_\_\_\_\_

Would you please confirm/provide the following information as it pertains to your Grand Jurisdiction:

Date of Initiation: \_\_\_\_\_ or Date of Affiliation: \_\_\_\_\_

Name of Chapter: \_\_\_\_\_ No. \_\_\_\_\_, City: \_\_\_\_\_

Date of Affiliation: \_\_\_\_\_

Name of Chapter: \_\_\_\_\_ No. \_\_\_\_\_, City: \_\_\_\_\_

Was the membership continuous while in your Grand Jurisdiction? YES NO

If not, state circumstances: \_\_\_\_\_

Date of Suspension, if any: \_\_\_\_\_ Date of Reinstatement: \_\_\_\_\_

Date of Demit: \_\_\_\_\_

Offices held: \_\_\_\_\_

Please send this information, on this form or in a letter, under the Seal of your Grand Chapter (or Chapter) as soon as possible, along with any further information that you may feel I need to know. Thank you.

Fraternally,

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
Secretary (Print or type name)

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_

(Seal of CA Chapter)

Verified by: \_\_\_\_\_

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print or type name)

\_\_\_\_\_  
(Title)

(Seal)

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

2008.05.05 jn ltr/chnp.20080505

**Verification of Membership  
Request for Verification of Membership**



Grand Chapter of California  
Order of the Eastern Star

Last Name \_\_\_\_\_

Date \_\_\_\_\_

### Member Résumé

This résumé is used to make an inventory of the talents and experience of our members which would be beneficial to Grand Chapter. Please print or type your answers.

YOURSELF	
Full Name _____	
Name & Number of your Chapter(s) _____ Year Initiated _____	
Address _____ City _____ Zip _____	
Email _____ Phone _____	
Occupation (present or former) _____	
SERVICE TO YOUR CHAPTER, GRAND CHAPTER AND RELATED ORGANIZATIONS	
<b>Chapter Service</b> <small>PW/VP</small> _____ Year(s) _____ _____ _____ _____	<b>Grand Chapter Service</b> <small>Grand Offices, DGM, Grand Representative</small> _____ Year(s) _____ _____ _____ _____
<b>Youth Groups</b> <small>Services Given</small> _____ Year(s) _____ _____ _____ _____	<small>Committee Appointments</small> _____ Year(s) _____ _____ _____ _____

Please list, in order of preference, your choice of service to the Grand Chapter of California with a brief, specific explanation of what talents, abilities, or experience you would bring to each choice.

- 1) \_\_\_\_\_  
\_\_\_\_\_
- 2) \_\_\_\_\_  
\_\_\_\_\_
- 3) \_\_\_\_\_  
\_\_\_\_\_

2008/01/04 — jh — last change 2008/01/04

Over — More Information on Back →

### Member Résumé (front)



Below is a list of the various committees of Grand Chapter. Please refer to the *Constitution and Laws* for descriptions of the various committees.

<b><u>Standing Committees</u></b>	
Aims and Objectives	Endowment Fund
Annual Session Site	Finance
Appeals and Grievances	Fraternal Correspondence
Audit	JC Lee Memorial Cancer Fund
Benevolent Fund	Jurisprudence
Cancer Assistance	Marguerite Rennie Memorial Fund
Consolidations	Membership
Constitution and Bylaws	Public Relations
Credentials	Scholarship
Eastern Star Patient Comfort Program	Web Site
<b><u>Special Committees</u></b>	
Barnum – Weisheimer Silver Tea	Liaison to Grand Lodge
Booth at Grand Lodge	Liaison to Youth Groups
Cal Star News	Masonic Family Day at Covina
Community Service Program	Relay for Life
Eastern Star Journal	Roster Advertisements
Excess Property	Sensational Saturday
Heart Research	Tri-State Event
Home Fiesta	Vision Quest
Leadership Development	We Care Program
Liaison to General Grand Chapter	Worthy Grand Matron's Special Project
<b><u>Grand Chapter Week Committees</u></b>	
Arts and Crafts	Lost and Found / Information
Banquets	Masonic Family Honor Session
Cancer Dressing Gift Wrap	Music / Grand Choir
Committee Rooms	Necrology / Divine Service
Courtesies to Dignitaries	Parliamentarian
Special Courtesies	Pictures
Decorations	Programs
Drayage	Publicity
Election Board	Safety Coordinators
Entertainment	Seating
Escort / Grand March	Secretarial Services
Kick-off Meal Event	Set-up Grand Chapter Floor / Auditorium
Fun Night	Signs
Grand Guards	Sound and Lighting
Grand Inner Guards	Special Duties
Health and Personal Services	Transportation
Housing	Vendor Coordinator

I would be interested in serving in the following capacities:

Deputy Grand Matron       Grand Representative (list jurisdiction): \_\_\_\_\_

Please send this completed form to the Grand Chapter office at:

16960 Bastanchury Rd., Ste. E, Yorba Linda, CA 92886-1711

Member Résumé  
(back)

**UNIFORM CODE**  
of  
**Bylaws of Chapters of the Order of the Eastern Star**  
under the Jurisdiction of the Grand Chapter  
of California

**ARTICLE I**  
**NAME AND OFFICERS**

Sec. 1. This Chapter shall be known by the name of Chapter No. \_\_\_\_\_ of the Order of the Eastern Star, and its officers shall consist of a Worthy Matron, Worthy Patron, Associate Matron, Associate Patron, Chaplain, Marshal, Organist, Adah, Ruth, Esther, Martha, Elekta, Wander and Sentinel.

Sec. 2. They shall be elected, appointed and installed in conformity with the Constitution and Laws of the Grand Chapter.

**ARTICLE II**  
**MEETINGS**

Sec. 1. The stated meetings of this Chapter shall be held at \_\_\_\_\_ (Name of Center) \_\_\_\_\_ (Address) \_\_\_\_\_ (City or Town) \_\_\_\_\_ on the \_\_\_\_\_ in each month at \_\_\_\_\_ o'clock P.M.; provided, however, no meeting shall be held on the days designated for the annual session of the Grand Chapter, nor on the day prior to the formal opening, or the day following the close, of the annual session, nor on \_\_\_\_\_

Sec. 2. In the event there is no meeting due to a lack of a quorum because of inclement weather or a natural disaster, a substitute meeting may be scheduled within 14 days of the original meeting.

Sec. 3. No meeting, stated or special, for transaction of business, can be opened or held without the presence of the charter or dispensation under which the Chapter is working and seven members, including one of the first four officers.

**ARTICLE III**  
**DUTIES OF OFFICERS**

Sec. 1. The duties of the Worthy Matron, Worthy Patron, Associate Matron, Associate Patron, Secretary and Treasurer shall be as prescribed by the Constitution and Laws of the Grand Chapter and as provided in this Article.

Sec. 2. The Secretary shall:

- (a) Record the proceedings of the Chapter;
- (b) Prepare a quarterly summary, due the Chapter and pay the same over to the Treasurer, asking a receipt therefor;
- (c) Keep a correct account between the Chapter and its members;

shall be the spouse, parent, or child of the Worthy Matron, Worthy Patron, Secretary or the Treasurer of the Chapter. The Secretary and the Treasurer shall not be appointed to the Auditing Committee.

Bills and accounts must be submitted in itemized form.

(c) A Budget Committee to consist of three or more members, one of whom shall be a Past Matron and one a Past Patron, whose duty it shall be to prepare a budget of income and expenditures for the following year, and to report the same to the Chapter at the meeting to be held prior to the end of the Chapter's fiscal year. The total of the amount allowed for expenditures may not be exceeded, except by majority vote of the members present and voting at a stated meeting.

(d) A Property Committee to consist of three members, one of whom shall be a Past Matron, whose duty it shall be to maintain a current inventory of all properties owned by the Chapter, and who shall submit an inventory of the same at the first stated meeting following December 1.

(e) A Membership Committee to consist of three members, one of whom shall be appointed Chairman, whose duty it shall be to disseminate membership and related information to members as well as non-members; to attend at least one membership/leadership training session provided by the Grand Chapter; Membership Committee to distribute and disseminate organizational information provided by the Grand Chapter as well as to solicit and disseminate information regarding the Chapter's activities, including material and program ideas provided by Grand Chapter Membership Committee and the Chapter Membership Committee.

Sec. 2. All reports of Committees to the Chapter, except those of the Relief Committee, shall be made in writing.

Sec. 3. All elected Officers shall be ex-officio members of these Committees, without vote.

Sec. 4. Clubs, as authorized by the Constitution and Laws of the Grand Chapter, functioning as Ways and Means groups of the Chapter, may sponsor activities for the purpose of raising funds to augment the fixed revenue of the Chapter. The net proceeds of all money raising functions sponsored by the Club shall be turned over to the Secretary of the Chapter within 30 days of the completion of the activity. No money raising activity shall be conducted which will not to exceed one thousand dollars (\$1,000.00) may be retained by the Club for working capital if needed.

**ARTICLE VII**  
**AMENDMENTS**

Sec. 1. These bylaws may be amended by a proposition in writing at a stated meeting and acted upon at a succeeding stated meeting. Notice to the membership of such proposition and its consideration shall be given in like manner as notice of a special meeting. Any amendments shall be adopted by a majority vote of the members present and voting. They shall go into effect on receipt and reading at a stated meeting of notice of approval thereof by the Worthy Grand Matron, Worthy Grand Patron or the Grand Chapter, as required by its laws; provided, however, that the foregoing procedure shall not apply to amendments or changes in bylaws ordered by Grand Chapter. Such amendments or changes shall automatically become a part of these bylaws and the Secretary shall note the amendments or changes herein.

**Uniform Code of Bylaws**  
**(outside)**

Sec. 5. The other officers shall perform the duties indicated by their titles and statutes, and as directed by the Chapter.

Sec. 6. The Secretary, Treasurer, Organizer and/or Scoutmaster may be allowed such compensation for services as the Chapter may direct.

#### ARTICLE IV MEMBERSHIP

Sec. 1. The reception of petitions for initiation or affiliation, the reference of said petitions to Committees of Investigation, and holding thereon shall be in conformity with the Constitution and Laws of the Grand Chapter, and every person initiated in or affiliating with this Chapter shall sign in by laws, as provided in such Law.

#### ARTICLE V FEES AND DUES

Sec. 1. The initiation fee in this Chapter shall be ..... dollars. The affiliation fee in this Chapter shall be ..... dollars. The fee for an officer to accompany the petition. If a petitioner for affiliation has not been a member of a Chapter within six months preceding such application, six months back dues must also accompany the petition, unless payment of such dues within such six months is shown by endorsement on the form; or the document, accompanying the petition.

Each petitioner for initiation, and each petitioner for affiliation from a Chapter in a jurisdiction other than California, shall pay fifteen dollars for the Eastern Star Home Improvement Fund. Contributions to the fund covered in this Article and each petition for affiliation shall be made to the fund in the jurisdiction in which the petitioner is to be affiliated. California dues shall be paid to the Eastern Star Home Improvement Fund. Each petitioner for membership and each applicant for affiliation, who has never before been a member in the Chapter in which she/he is currently affiliating, shall pay Five Dollars for the use and benefit of the International Headquarters in Washington, D.C., in addition to the fee covered in this Article.

Sec. 2. The annual dues of each member shall be *(check one line only)*:  ..... dollars /  the amount of the Grand Chapter annual percentage fee and special assessments shall be paid in full to the Grand Chapter at the time of initiation or affiliation. No one may be initiated or affiliated until the dues have been paid in full. No one may be initiated or affiliated until the dues and/or assessments shall subject a member to penalties prescribed by the Constitution and Laws of the Grand Chapter.

#### ARTICLE VI COMMITTEES

Sec. 1. The Worthy Matron, at her installation, shall appoint the following committee: (a) A Relief Committee to consist of the Worthy Matron, Worthy Patron, Associate Matron and Associate Patron. The duty of the Committee shall be to inform itself of the needs of members of the Chapter and to cause such fraternal assistance to be given by the Chapter as the conditions warrant and as the circumstances permit. The Committee shall have power to receive the contributions of members of the Chapter for a station covering such duties, if initiated before the next stated meeting or emergency trial of a newly member in good standing.

(b) An Auditing Committee to consist of three or more members, at least three of whom shall examine and pass upon all bills and claims against the Chapter before they are paid; to examine the books, vouchers and accounts of the Secretary and Treasurer and to make a report upon the financial condition and affairs of the Chapter as of the end of the fiscal year. This report shall be presented at the first stated meeting of the Chapter held after the expiration of the fiscal year. The Committee shall consist of members of the Chapter, except for the Secretary of the Chapter. Except for ex officio members, no member of the Auditing Committee

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(d) Report monthly to the Grand Secretary the transactions of the Chapter as required by the Constitution and Laws of the Grand Chapter;

(e) Keep a current register of all members of the Chapter, paying particular attention to change of address, both in California and other jurisdictions. When a change of address is reported, the Secretary shall advise the Grand Secretary of the change of address by the Grand Secretary in the area of education, by the Secretary or a member designated by the Secretary;

(f) Keep the seal of the Chapter and impress it on all receipts, communications, certificates and documents of the Chapter on execution thereof; (g) Keep the records of the Chapter, including all notices and other communications required by the bylaws or the Worthy Matron;

(h) Have present at each meeting the current Minute Book, Constitution and Laws of the Grand Chapter and the bylaws of the Chapter, and such other equipment as required; (i) Read all communications, pertaining to the Chapter or the Order, promptly report all others and read such as are requested;

(j) Require all bills and accounts against the Chapter to be in itemized form and submit the same to the Auditing Committee for its examination and action;

(k) Report promptly to the Grand Secretary any special election Officers, together with their names, addresses, and any changes of address, resignation or death of any elected officer;

(l) By November 1 of each calendar year transmit to the Grand Secretary, on a form provided, the membership numbers, names and addresses of all officers;

(m) Notify the Grand Secretary of the death of any present or Past Grand Officer belonging to the Chapter;

(n) Perform all other duties required by the bylaws and pertaining to the office.

In keeping the records and otherwise performing the duties of the office, shall acquire the records of the Chapter, including the books, forms and other supplies as provided by the Constitution and Laws of the Grand Chapter.

Sec. 3. The Treasurer shall: (a) Issue all checks, which are to be signed by any two of the three following officers: Worthy Matron, Secretary or Treasurer;

(b) Keep for seven years all bills and cancelled checks or vouchers; (c) Keep a current register of all bank accounts of the Chapter in such bank or banks as may be designated by it and shall keep a just and accurate account thereof;

(d) Submit ..... reports ..... *(here insert quarterly, semi-annually or annually, as the Chapter may elect)* a report of the monetary transactions of the Chapter.

All disbursements of Chapter funds shall be paid by check ordered by the Chapter.

Sec. 4. The fiscal year of the Chapter year shall be from October 1 to September 30, after which the books of the Secretary and Treasurer shall be closed and audited. At the first stated meeting after December 1, the reports of the Secretary, Treasurer and Trustees regarding the prior fiscal year shall be read. The Secretary and Treasurer shall deliver the books and other property of the Chapter to their successors when duly installed.

The Secretary, Treasurer or Trustees, in their annual report to the Chapter, shall list all insurance policies, giving amount of coverage and expiration date; list all bonds or other instruments showing the true property of the Chapter, giving purchase price, rate and date of interest and date of maturity.

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## Uniform Code of Bylaws (inside)





# SUMMARY OF RECEIPTS

At the meeting of \_\_\_\_\_ Chapter No. \_\_\_\_\_  
held on \_\_\_\_\_, the following receipts were received:

Description	Amount	Form of Payment
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
		<input type="checkbox"/> Cash / Chk# _____
<b>Subtotal from reverse</b>		
<b>Subtotal from _____ attached sheets</b>		
<b>TOTAL RECEIPTS</b>		

Additional receipts are to be listed on the reverse and attached sheets.

2004/10/01 jrh last change 2004/11/12

Summary of Receipts  
(front)









# Demit Forms

To all members  
of the

## Order of the Eastern Star



This:

### Demit

Witnesseth that \_\_\_\_\_, whose signature appears below, being in good standing, having paid all dues and assessments and being free from all charges, is, at her/his own request, lawfully withdrawn from membership in \_\_\_\_\_ Chapter No. \_\_\_\_\_ under the jurisdiction of the Grand Chapter of California, on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

This member bears the fraternal regard of the Officers and Members of this Chapter, who recommend her/him to the fellowship and protection of all members of the Order.

#### Member's History:

On \_\_\_\_\_, this member joined \_\_\_\_\_ California Member No. \_\_\_\_\_ located at \_\_\_\_\_ Chapter No. \_\_\_\_\_ by Initiation/Affiliation.

This Chapter has become \_\_\_\_\_ Chapter No. \_\_\_\_\_ located at \_\_\_\_\_ through consolidation/name change.

Membership was continuous:  Yes  No If no, state reasons and give dates: \_\_\_\_\_

Life Sponsor of the Eastern Star Home in California?  Yes  No

Served as Worthy Matron/Worthy Patron: \_\_\_\_\_

Other offices held: \_\_\_\_\_

Awards received: \_\_\_\_\_

Additional membership information: \_\_\_\_\_

Additional membership history, if available, may be listed on the reverse.

Given under our hand and the seal of the Chapter  
this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Member \_\_\_\_\_

Worthy Matron \_\_\_\_\_ (seal)

Secretary \_\_\_\_\_

**Do not use this form for a dual/plural member.**  
This certificate may be used for the purpose of affiliation.

In California, if a Demit was issued more than six months prior to the submission of a Petition for Affiliation and if there is no endorsement on the Demit showing that at least six months dues have been paid to a Chapter within the last six months, then, in addition to the regular affiliation fees, six months worth of dues,

of the Chapter where the Petition for Affiliation is being submitted, must be paid. These dues are non-refundable. Upon receipt of these dues, the Secretary must endorse the Demit indicating receipt of those dues. Payment of these dues does not place the member in good standing, but does reinstate the right of affiliation or visitation for a period of six months from the endorsement. See C&L Section 202. Additional endorsements should follow the format below and be placed on the reverse.

I, \_\_\_\_\_, Secretary of \_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_, acknowledge receipt of funds in the amount of \$ \_\_\_\_\_, which is six months dues of this Chapter.

Date: \_\_\_\_\_ (seal)

Secretary \_\_\_\_\_

05/01/2004 last change 06/03/2005

Demit  
(Mandatory)

To all members  
of the

# Order of the Eastern Star



## This: **Certificate of Discontinuance of Multiple Membership**

Witnesseth that \_\_\_\_\_, whose signature appears below and who became a plural/dual member on \_\_\_\_\_, being in good standing, having paid all dues and being free from all charges, is, at her/his own request, lawfully withdrawn from membership in \_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

In her/his voluntary severance of membership in this Chapter, she/he is retaining membership in \_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_ only.

This member bears the fraternal regard of the Officers and Members of this Chapter, who recommend her/him to the fellowship and protection of all members of the order.

**Member's History:** California Member No. \_\_\_\_\_  
On \_\_\_\_\_, this member joined \_\_\_\_\_ Chapter No. \_\_\_\_\_ located at \_\_\_\_\_ by Initiation/Affiliation.

That Chapter has become \_\_\_\_\_ Chapter No. \_\_\_\_\_ located at \_\_\_\_\_ through consolidation/name change.

Membership was continuous:  Yes  No If no, state reasons and give dates: \_\_\_\_\_

Life Sponsor of the Eastern Star Home in California?  Yes  No

Served as Worthy Matron/Worthy Patron: \_\_\_\_\_

Other offices held: \_\_\_\_\_

Awards received: \_\_\_\_\_

Additional membership information: \_\_\_\_\_

Additional membership history, if available, may be listed on the reverse.

Given under our hand and the seal of the Chapter  
this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

\_\_\_\_\_  
**Member**

This certificate may **not** be used for the purpose of affiliation.

en/01/04/02 last change 06/03/05

(seal)

\_\_\_\_\_  
**Worthy Matron**

\_\_\_\_\_  
**Secretary**

## Certificate of Discontinuance of Multiple Membership



This page was intentionally left blank.



# Notice of Dues

Date: \_\_\_\_\_, 20\_\_\_\_  
 From: The Office of the Secretary of \_\_\_\_\_ Chapter No. \_\_\_\_\_, O.E.S.  
 To: \_\_\_\_\_

You are hereby notified that dues and assessments are/were due and payable as of \_\_\_\_\_, 20\_\_\_\_ as follows:

Current Dues \$ \_\_\_\_\_  
 Current Grand Chapter Assessments \$ \_\_\_\_\_  
 Dues and Assessments past due for the years \_\_\_\_\_ \$ \_\_\_\_\_  
 Total Due \$ \_\_\_\_\_

Please give this matter your prompt attention. If you cannot pay your dues, for any reason, please contact the Worthy Matron, Worthy Patron, Associate Matron, Associate Patron, or Secretary.

Fraternally,

Secretary—signature \_\_\_\_\_ Secretary \_\_\_\_\_  
 Address \_\_\_\_\_ Address \_\_\_\_\_  
 Address \_\_\_\_\_ Address \_\_\_\_\_  
 Phone \_\_\_\_\_ Phone \_\_\_\_\_  
 Email \_\_\_\_\_ Email \_\_\_\_\_

04/02/04 07/04/07/10/04

## Notice of Dues (Optional)



# Notice of Delinquent Dues



Date: \_\_\_\_\_

From: The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_

To: \_\_\_\_\_

Your dues and Grand Chapter assessments totaling \$ \_\_\_\_\_ for the years \_\_\_\_\_ remain unpaid.

Because of these outstanding dues and assessments, you will be suspended at the stated meeting of this Chapter being held on \_\_\_\_\_. To avoid suspension, you must pay the above amount at or before that meeting or give the Chapter good and satisfactory reasons for your failure to do so. (See the excerpt from the Constitution and Laws below.)

Please give this matter your prompt attention.

Fraternally, \_\_\_\_\_  
Secretary's name (print)

(encl)

Address \_\_\_\_\_

Secretary (signature) \_\_\_\_\_  
City State Zip

Phone email

Sec. 249. **PERIOD OF DELINQUENCY.** A member who fails to pay Chapter dues or Grand Chapter annual per capita fees or special assessments for a period of six months from the close of the calendar year in which payment shall have been due, may be suspended; however, a member who fails to pay Chapter dues or Grand Chapter annual per capita fees or special assessments for a period of one year from the close of the calendar year in which payment shall have been due, shall be suspended, unless the Chapter shall, by majority vote, excuse such failure. If the Chapter suspends the member for non-payment, the Chapter shall not be required to pay such member's eastern star home assessments. While in effect, such suspension shall deprive a member of all the rights and privileges of the Order, including the right to represent herself/himself to be a member thereof, or to use or display the emblems of the Order provided that if the member has plural membership and has paid such dues and assessments to one Chapter or is a Life Member of one Chapter, but has not paid dues to or is not a Life Member of the other Chapter, he or she (as the case may be) shall be suspended from membership in the Chapter to which he or she has failed to pay dues, or is not a Life Member but shall not be deprived of any of the rights or privileges of the Order in the Chapter in which they remain in good standing. If such suspension is continued for six months, membership is thereby terminated, except for purposes of discipline, subject only to petition for reinstatement, as hereinafter provided.

**Notice Before Suspension.** If any member shall fail to pay such dues and/or assessments for the period hereinabove provided, the Secretary shall inform the Worthy Matron thereof and if directed by the Worthy Matron to do so, shall notify such member, by certified

mail, requiring a return receipt, that, at the first stated meeting which comes one month or longer, thereafter, the date of which shall be given in the notice, the member will be suspended from all the rights and privileges of the Order, unless the member makes such payment or, at such meeting, shows good and satisfactory reasons for failing to do so.

**Name Read and Suspension Required in Open Chapter.** If such member fails to pay such dues and/or assessments by the time specified in such notice, or to furnish reasons satisfactory to the Chapter for such failure, the Secretary shall read the name of such delinquent member in open Chapter, at such stated meeting, and the Worthy Matron shall thereupon declare such member suspended. Such suspension is not thereafter subject to reconsideration.

**Notice After Suspension.** The Secretary shall thereupon mail such member a notice, informing him of his suspension, that such suspension is from all the rights and privileges of the Order, and that, if within six months such delinquent sums, and subsequent arrearages are not paid, he can be reinstated only by petition for reinstatement to the Chapter, as provided, in Section 250.

**Dual Membership.** Members who are dual members and who are suspended from the Chapter in another jurisdiction for non-payment of dues, or other cause, are automatically suspended from a Chapter in this jurisdiction; or, if suspended from a Chapter in California, the Secretary of the Chapter shall immediately advise the Secretary of the Chapter in another jurisdiction in which membership is held, of such suspension.

09/06/2006 last change 09/06/2006

## Notice of Delinquent Dues (Optional)



# Suspension Forms

## Notice of Suspension of a suspended dual member



Date: \_\_\_\_\_

From: \_\_\_\_\_ The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_, O. E. S.

To: \_\_\_\_\_

The Worthy Matron has received satisfactory evidence that you have been suspended from your dual chapter. Pursuant to Sec. 249 of the Constitution and Laws of the Grand Chapter of California, O.E.S., you are automatically suspended from all the rights and privileges of the Order of the Eastern Star.

Upon presentation to the Worthy Matron of evidence of your reinstatement in your dual chapter, you will be immediately and automatically reinstated into this Chapter.

Dues and assessments may continue to accrue during your suspension.

If we can provide any assistance in resolving this matter, please contact either the Worthy Matron or the Secretary. We look forward to your reinstatement and future participation in our Chapter.

\_\_\_\_\_  
Worthy Matron

(local)

\_\_\_\_\_  
Secretary

In California, a *dual member* is a member of both a chapter under the jurisdiction of the Grand Chapter of California and a chapter outside of California (see Section 192 of the Constitution and Laws for further information).

Sec. 249. **PERIOD OF DELINQUENCY.** . . .

**Dual Membership.** Members who are dual members and who are suspended from the Chapter in another jurisdiction for non-payment of dues, or other cause, are automatically suspended from a Chapter in this jurisdiction; or, if suspended from a Chapter in California, the Secretary of the Chapter shall immediately advise the Secretary of the Chapter in another jurisdiction in which membership is held, of such suspension.

### REINSTATEMENT

Sec. 250. **PROVISION FOR, AND RULES GOVERNING.** . . .

Reinstatement in the suspending Chapter of multiple member (one holding dual or plural membership) shall immediately and automatically restore her/him to membership in the other Chapter in this Jurisdiction of which she/he was a member.

es/03/03ac last change 06/24/2007

## Notice of Suspension (Dual)

# Notice of Suspension for non-payment of dues or assessments



Date: \_\_\_\_\_

From: The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_, O.E.S.

To: \_\_\_\_\_

You are hereby notified that at the stated meeting of this Chapter held on \_\_\_\_\_,  
you were suspended for non-payment of dues and Grand Chapter assessments totaling \$ \_\_\_\_\_.

This suspension is from all the rights and privileges of the Order. If the above amount, and any subsequent arrearages, are not paid within six months, you can be reinstated only by petition for reinstatement as provided in Section 250 of the Constitution and Laws.

Additional charges may continue to accrue during your suspension.

\_\_\_\_\_  
Worthy Matron

(small)

\_\_\_\_\_  
Secretary

## REINSTATEMENT

Sec. 250. **PROVISION FOR, AND RULES GOVERNING.** Suspension for nonpayment of dues or assessments, or both, may be terminated and the member reinstated by the suspending Chapter only, unless it is extinct, and in that event by Grand Chapter, by proceeding as follows:

(1) Within Six Months. If, within such six months' period all or a portion of arrearages, dues and/or assessments shall have been remitted as provided by Section 248, and the remainder, if any, shall be paid, the Worthy Matron shall authorize the termination of the suspension and declare the member reinstated.

(2) After Six Months' Suspension. Reinstatement as a member in good standing of the Chapter, after six months' suspension for nonpayment of dues and/or assessments may be effected only by petition for reinstatement, and the same procedure followed as required for a petition for membership, except that such petition for reinstatement need not be signed by two members of the Chapter in which such petition is filed, but may be signed by the petitioner alone, and requires a ballot containing less than three cubes to reinstate the suspended member. If three cubes are cast on the ballot, a rebalot shall immediately be taken, to correct any possible error. If the petitioner is no longer a resident of the jurisdiction of the Chapter, the Worthy Matron shall request the Worthy Matron of a Chapter within whose jurisdiction the petitioner is residing to appoint an investigating committee. Reports of the Committee shall be certified over seal of the investigating Chapter and returned to the Chapter petitioned.

Reinstatement is complete upon announcement of a favorable ballot.

The amount set by the Chapter at or prior to the time the petition is presented must be paid before any action is taken upon the petition.

No qualifications concerning residence or Masonic relationship are required, except that a petitioning brother must show that he is at that time an affiliated Master Mason in good standing.

If rejected, the petitioner is entitled to a certificate of restoration in the Order, which shall have the same effect as a demit for the purpose of a petition for affiliation, or for visitation.

The result of the ballot shall be entered in the minutes of the meeting and a marginal reference thereto shall be made opposite the minutes of the former meeting recording the petitioner's suspension and showing the date of such action.

The dues and assessments paid under this section shall be retained by the Chapter and such annual per capita fees and special assessments as are due on account of the member shall be paid to the Grand Chapter.

Note: For Grand Chapter demits of suspended members of extinct or suspended Chapters, see Sec. 236.

05/02/2004 last change 05/06/2004

## Notice of Suspension (Dues)

# Notice of Suspension for loss of Masonic standing



Date: \_\_\_\_\_

From: \_\_\_\_\_ The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_, O.E.S.

To: \_\_\_\_\_

Satisfactory evidence has been provided to the Worthy Patron that you are no longer in good standing in any Masonic Lodge. Therefore, you are no longer in good standing in the Order of the Eastern Star.

You are hereby notified that at the stated meeting of this Chapter held on \_\_\_\_\_, you were declared suspended for loss of Masonic standing.

This suspension is from all the rights and privileges of the Order. When you have been reinstated in good standing in a Lodge, or if this suspension was in error, please provide to the Worthy Patron evidence of your good standing in a Masonic Lodge. If such evidence is presented within six months of this suspension, and any arrearages of dues and assessments are paid, you will be reinstated into the chapter. However, if this is not accomplished within six months of the suspension, you can be reinstated only by petition for reinstatement as provided in Section 250 of the Constitution and Laws.

Additional charges may continue to accrue during your suspension.

\_\_\_\_\_  
Worthy Matron

(see)

\_\_\_\_\_  
Secretary

## LOSS OF MASONIC STANDING

Sec. 240. **LOSS OF MASONIC STANDING.** A brother loses his good standing in the Order immediately upon losing his good standing as a Master Mason; but the standing of a sister, once she becomes a member of the Order, is not affected by any loss of Masonic eligibility requirements.

Sec. 241. **SUSPENSION.** When a brother is suspended or expelled from a lodge of Master Masons, or demits therefrom, he is thereby deprived of all the rights of membership in the Order of the Eastern Star, until reinstated in good standing as an affiliated Master Mason and in this Order, as hereinafter provided.

Upon being informed thereby a Master Mason who is a member of the brother's lodge, and confirmation thereof by an officer of such lodge, or upon evidence satisfactory to the Worthy Patron, the Worthy Matron shall declare the brother suspended, whereupon the brother is not entitled to any refund of dues and/or assessments paid in advance or if a life member, to any of the fee paid therefor.

ae/fo/boag list/rtage/soho/boag

Sec. 242. **REINSTATEMENT.** On reinstatement in good standing as an affiliated Master Mason, the brother is thereby restored to good standing in the Chapter, if clear on the books, or on payment of any arrearages of dues and/or assessments due to the date of such restoration; provided, however, that if the brother was declared suspended, and the period of suspension from the Chapter is more than six months, such brother shall also be required to petition for reinstatement, and the procedure as set forth in Section 250 shall be followed. On being restored to good standing in the Chapter without prior declaration of suspension, the Worthy Matron may declare the suspended brother reinstated in her discretion or on his request; but, if he was declared suspended, she must declare him reinstated, and such declaration shall be recorded in the minutes. On reinstatement, he is entitled to the benefit of any advance payment of dues and/or assessments or life membership fees standing to his credit on the books of the Chapter. Dues and/or assessments may be remitted as provided in Section 250.

## Notice of Suspension (Masonic standing)

# Order of the Eastern Star



## Notification of Suspension of Dual Member

Date: \_\_\_\_\_

From: The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_, California

To: The Officers and Members of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_

Please take notice that Sister/Brother \_\_\_\_\_  
who became a dual member on \_\_\_\_\_ by affiliating with  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_

- has been suspended for non-payment of Dues and Assessments. We will inform you when this member has been reinstated.
- has been suspended due to loss of Masonic standing. We will inform you when this brother has been reinstated. The Lodge that suspended him can be contacted at \_\_\_\_\_
- has been suspended for a period of \_\_\_\_\_ months, after a trial. She/He will automatically be restored to good standing on \_\_\_\_\_
- has been suspended \_\_\_\_\_

Given under our hand and the seal of the Chapter  
this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

\_\_\_\_\_  
Worthy Matron

(seal)

\_\_\_\_\_  
Secretary

In accordance with Sec. 249 of the Constitution and Laws, when a dual member is suspended, notice must immediately be sent to the Secretary of the Chapter in the other Jurisdiction.

06/01/2004      last change 06/10/2004

## Notification of Suspension of Dual Member

# Reinstatement / Restoration Forms

## Order of the Eastern Star



### Notification of Restoration of Dual Member

Date: \_\_\_\_\_

From: \_\_\_\_\_ The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_, California

To: \_\_\_\_\_ The Officers and Members of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_

Please take notice that Sister/Brother \_\_\_\_\_  
who became a dual member on \_\_\_\_\_ by affiliating with  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_  
and who was suspended on \_\_\_\_\_, has been restored at a stated meeting  
held on \_\_\_\_\_.

She/He is no longer a member of \_\_\_\_\_ Chapter No. \_\_\_\_\_ of  
\_\_\_\_\_, California, and, therefore, is no longer a dual member.

Given under our hand and the seal of the Chapter  
this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Worthy Matron

(seal)

\_\_\_\_\_  
Secretary

When a member, who was a dual member at the time of her/his suspension  
is reinstated, a notice is to be sent to the Chapter to which the Notification  
of Suspension of Dual Member was sent.

oe/ro/one    lat/cha/rd/ty/one

### Notification of Restoration of Dual Member

To all members  
of the

# Order of the Eastern Star



## This: Certificate of Restoration

Witnesseth that \_\_\_\_\_, whose signature appears below, was restored to membership in the Order by \_\_\_\_\_ Chapter No. \_\_\_\_\_ under the jurisdiction of the Grand Chapter of California, on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.  
 At the time of the suspension, this member held dual/plural membership and was also a member of \_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_.

### Member's History:

On \_\_\_\_\_, this member joined \_\_\_\_\_ California Member No. \_\_\_\_\_ Chapter No. \_\_\_\_\_ located at \_\_\_\_\_ by Initiation/Affiliation. This Chapter has become \_\_\_\_\_ Chapter No. \_\_\_\_\_ located at \_\_\_\_\_ through consolidation/name change. State reasons and give dates when membership was not continuous: \_\_\_\_\_

Life Sponsor of the Eastern Star Home in California?  Yes  No  
Served as Worthy Matron/Worthy Patron: \_\_\_\_\_  
Other offices held: \_\_\_\_\_

Awards received: \_\_\_\_\_  
Additional membership information: \_\_\_\_\_

Additional membership history, if available, may be listed on the reverse.

Given under our hand and the seal of the Chapter  
this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Worthy Matron

(seal)

\_\_\_\_\_  
Member

\_\_\_\_\_  
Secretary

This certificate is to be given to a member who was suspended, other than by trial, for over six months and who paid all fees required by the chapter, but whose Petition for Reinstatement was rejected. It has the same effect as a Demit for the purpose of a petition for affiliation or for visitation.

A member who was a dual/plural member prior to her/his suspension should surrender this document to her/his current chapter immediately, or as soon as she/he has been restored to good standing in that chapter. No member in good standing in a Chapter should ever possess a demit.

In California, if a Demit was issued more than six months prior to the submission of a Petition for Affiliation and if there is no endorsement on the Demit showing that at least six months dues have been paid to a Chapter within the last six months, then, in addition to the regular affiliation fees, six months worth of dues, of the Chapter where the Petition for Affiliation is being submitted, must be paid. These dues are non-refundable. Upon receipt of these dues, the Secretary must endorse the Demit indicating receipt of those dues. Payment of these dues does not place the member in good standing, but does reinstate the right of affiliation or visitation for a period of six months from the endorsement. See C&L Section 202. Additional endorsements should follow the format below and be placed on the reverse.

I, \_\_\_\_\_, Secretary of \_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_, acknowledge receipt of funds in the amount of \$ \_\_\_\_\_, which is six months dues of this Chapter.

Date: \_\_\_\_\_

(seal)

\_\_\_\_\_  
Secretary

06/01/2004 last change on 10/20/04

## Certificate of Restoration (Mandatory)

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# Petitions

## PETITION FOR AFFILIATION

\_\_\_\_\_, California, \_\_\_\_\_, 20\_\_

To the Worthy Matron, Worthy Patron, and Members of \_\_\_\_\_ Chapter No. \_\_\_\_\_ Order of the Eastern Star:

I, the undersigned, respectfully represent that I was regularly initiated in \_\_\_\_\_ Chapter No. \_\_\_\_\_  
located at \_\_\_\_\_ County of \_\_\_\_\_, State of \_\_\_\_\_  
on the \_\_\_\_\_ day of \_\_\_\_\_,

I  am now /  was last a member of \_\_\_\_\_ Chapter No. \_\_\_\_\_,  
located at \_\_\_\_\_ County of \_\_\_\_\_,  
State of \_\_\_\_\_, as will appear by the accompanying  Certificate (or Letter) of Good Standing /  Demit,  
and that I now seek affiliation with \_\_\_\_\_ Chapter No. \_\_\_\_\_ located  
at \_\_\_\_\_, California as  an Affiliated member /  a dual or plural member.

If the petitioner is a brother, he shall fill in the following:

I am now a member in good standing of \_\_\_\_\_ Lodge No. \_\_\_\_\_ E&A M.  
of \_\_\_\_\_.

**Any willful concealment of a material fact or any fraud  
practiced in obtaining membership shall subject the  
member to disciplinary action and this may result in  
suspension or expulsion from the Order.**

\_\_\_\_\_  
(Signature)  
Recommended by \_\_\_\_\_

### QUESTIONNAIRE

(All answers must be printed neatly by the petitioner.)

1. What is your full name? \_\_\_\_\_
2. Where do you reside? \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_
3. When and where (city & state or country) were you born? \_\_\_\_\_
4. Where was your last place of residence? \_\_\_\_\_
5. What is your occupation and place of business (include the address)? \_\_\_\_\_  
Phone: \_\_\_\_\_
6. Please note all aliases and previous names: \_\_\_\_\_
7. Have you ever petitioned any other Chapter for affiliation? \_\_\_\_\_ What Chapter? \_\_\_\_\_  
What action was taken on your petition? \_\_\_\_\_
8. Have you ever belonged to a California Chapter? \_\_\_\_\_ List Chapter Names(s), Numbers(s), and dates of membership:  
\_\_\_\_\_
9. Have you ever been adjudged a habitual criminal or had a final conviction of felony under the law of any State or of the USA? \_\_\_\_\_
10. List next of kin, not residing in your household: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_

### REPORT ON PETITION

The Committee of Investigation on the above petition, having made a strict and careful examination, reports \_\_\_\_\_ favorably upon the petition of the above-named applicant.

Dated at \_\_\_\_\_, California, \_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Worthy Matron

\_\_\_\_\_  
Chapter No. \_\_\_\_\_, OES

2008/10/18 jh last change 2008/10/18

Petition for Affiliation  
(front) (Mandatory)



**PETITION FOR AFFILIATION**

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

\_\_\_\_\_ California

**ORDER OF THE EASTERN STAR**

Petition of \_\_\_\_\_

Presented \_\_\_\_\_, 20\_\_\_\_

Approved \_\_\_\_\_, 20\_\_\_\_

Rejected \_\_\_\_\_, 20\_\_\_\_

Signed Bylaws \_\_\_\_\_, 20\_\_\_\_

**PAYMENT REQUIRED WITH APPLICATION**

Fee for Degrees \$ \_\_\_\_\_  
Grand Chapter Endowment Fund\* \$ \_\_\_\_\_  
International Headquarters,  
Washington, DC\*\* \$ 5.00

Total Fees Submitted \$ \_\_\_\_\_

\*\$15.00 if affiliating on Demeit or Certificate (or Letter) of Good Standing from Chapter outside of California; \$10.00 if from one in California.  
\*\* Unless previously a member of this chapter.

Membership Number \_\_\_\_\_

Petition for Affiliation  
(back)(Mandatory)

# PETITION FOR INITIATION

\_\_\_\_\_, California, \_\_\_\_\_, 20\_\_

To the Worthy Matron, Worthy Patron, and Members of \_\_\_\_\_ Chapter No. \_\_\_\_\_, Order of the Eastern Star:

I, the undersigned, having reached the age of 18, being of sound mind and able (with the use of artificial aids if necessary) to participate in the ceremony of initiation, respectfully petition to receive the Degrees of the Order of the Eastern Star, and become a member of your Chapter. If accepted, I pledge myself to a cheerful obedience of the Laws of the Order.

Name: \_\_\_\_\_  
(Print name in full)

Residence: \_\_\_\_\_, California \_\_\_\_\_  
(Street/City/Country) (Zip code)

Phone: (\_\_\_\_) \_\_\_\_\_ email: \_\_\_\_\_

(1) \_\_\_\_\_ of \_\_\_\_\_, a member of  
(Relationship) Lodge No. \_\_\_\_\_ F.&A.M. of \_\_\_\_\_; OR  
(City and State)

(2) \_\_\_\_\_ of \_\_\_\_\_  
(a Majesty member/active member for three or more years) (Name of Assembly or Bethel)  
No. \_\_\_\_\_ International Order of \_\_\_\_\_ of \_\_\_\_\_  
(Ratchow for Girls/Girls Daughters) (City and State)

Recommended by \_\_\_\_\_ and \_\_\_\_\_

## QUESTIONNAIRE

(All answers must be printed neatly by the petitioner.)

- When were you born? \_\_\_\_\_  
(Month/Day/Year)  
Where? \_\_\_\_\_  
(City/Country/State/Country)
- Have you resided in the State of California for the last twelve months? \_\_\_\_\_
- State your occupation; former occupation, if retired: \_\_\_\_\_
- Have you ever presented a petition to any Chapter of the Order of the Eastern Star? \_\_\_\_\_  
If so, when and to what Chapter? \_\_\_\_\_  
State the outcome: \_\_\_\_\_
- Do you believe in a Supreme Being and a future existence? \_\_\_\_\_
- Do you know of any legal, religious, or moral reason preventing you: (a) fidelity to the obligation of the Order? \_\_\_\_\_
- or (b) obedience to the Constitution and Laws of the United States of America? \_\_\_\_\_
- Have you ever been adjudged an habitual criminal or had a final conviction of a felony under the law of any State or of the USA? \_\_\_\_\_
- Do you have a patriotic regard for the United States of America? \_\_\_\_\_
- List next of kin, not residing in your household:  
\_\_\_\_\_  
(Name)  
\_\_\_\_\_  
(Street address)  
\_\_\_\_\_  
(City, State, Zip)  
\_\_\_\_\_  
(Phone number)
- Do you, upon your honor, declare the foregoing statements to be true? \_\_\_\_\_

Signature

**Any willful concealment of a material fact or any fraud practiced in obtaining membership shall subject the member to disciplinary action and this may result in suspension or expulsion.**

## REPORT ON PETITION

The Committee of Investigation on the above petition, having made a strict and careful examination, reports \_\_\_\_\_ favorably as to character and \_\_\_\_\_ favorably as to eligibility of petitioner.

Dated at \_\_\_\_\_, California, \_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Worthy Matron

\_\_\_\_\_  
Chapter No. \_\_\_\_\_, OES

oosb/10/19 jh last change 2008/10/10

Petition for Initiation  
(front)(Mandatory)

**PETITION FOR INITIATION**

..... Chapter No. ....

....., California

**ORDER OF THE EASTERN STAR**

Petition of

Presented ..... 20 .....  
Approved ..... 20 .....  
Rejected ..... 20 .....  
Initiated ..... 20 .....

**PAYMENT REQUIRED WITH APPLICATION**

Fee for Degrees \$ .....  
Grand Chapter Endowment Fund \$ 15.00  
International Headquarters,  
Washington, DC \$ 5.00  
Total Fees Submitted \$ .....

Membership Number .....

Petition for Initiation  
(back)(Mandatory)

# PETITION FOR REINSTATEMENT

To the Worthy Matron, Worthy Patron, Officers and Members of

\_\_\_\_\_ Chapter No. \_\_\_\_\_, O. E. S.

The Undersigned respectfully represents that she/he was regularly initiated/affiliated in the Chapter above named on the \_\_\_\_\_ day of \_\_\_\_\_, 19/20\_\_\_\_\_; that she/he was suspended from said Chapter for nonpayment of dues on the \_\_\_\_\_ day of \_\_\_\_\_, 19/20\_\_\_\_\_. And (in case of a Brother) that he is a member in good standing of \_\_\_\_\_ Lodge No. \_\_\_\_\_ F.&A.M., located at \_\_\_\_\_ . The undersigned now petitions to be reinstated to membership in the Order and in said Chapter, and tenders in payment the amount required by the Chapter.

\_\_\_\_\_  
(Signature. Sign all names in full.)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City) (State) (Zip)

(Phone) (\_\_\_\_\_) \_\_\_\_\_

### QUESTIONNAIRE

(All questions must be answered in the handwriting of the petitioner.)

1. Name at time of suspension: \_\_\_\_\_
2. Address at time of suspension: \_\_\_\_\_  
\_\_\_\_\_
3. Cause of suspension: \_\_\_\_\_
4. Reason for desire for reinstatement: \_\_\_\_\_
5. State your occupation: \_\_\_\_\_
6. List next of kin, not residing in your household \_\_\_\_\_ (Phone) (\_\_\_\_\_) \_\_\_\_\_  
(Address) \_\_\_\_\_
7. Have you ever been adjudged an habitual criminal or had a final conviction of a felony under the Law of any State of the U.S.A.?  
\_\_\_\_\_

### REPORT ON PETITION

The Committee of Investigation on the above petition, having made a strict and careful examination, reports \_\_\_\_\_ favorably as to character and \_\_\_\_\_ favorably as to eligibility of petitioner.

Dated at \_\_\_\_\_ California \_\_\_\_\_, 20 \_\_\_\_\_

\_\_\_\_\_ Worthy Matron of

\_\_\_\_\_ Chapter No. \_\_\_\_\_ O.E.S.

Grand Chapter of California 2004/dw

Petition for Reinstatement  
(front)(Mandatory)



# REPORT ON PETITION

Chapter No. \_\_\_\_\_, O.E.S.  
\_\_\_\_\_, California \_\_\_\_\_, 20\_\_\_\_  
Sister/Brother \_\_\_\_\_ you have been appointed one of a  
Committee on the petition of \_\_\_\_\_  
\_\_\_\_\_  
(Relationship) \_\_\_\_\_ of \_\_\_\_\_  
Member of \_\_\_\_\_ Lodge No. \_\_\_\_\_ F.&A.M., OR  
\_\_\_\_\_ Chapter No. \_\_\_\_\_ O.E.S.  
of \_\_\_\_\_ to become a member of this Chapter by: Initiation/Affiliation/Reinstatement.

Residence: \_\_\_\_\_ Occupation: \_\_\_\_\_  
\_\_\_\_\_ Place of Business: \_\_\_\_\_  
\_\_\_\_\_ Recommended by: \_\_\_\_\_  
Phone Number: (\_\_\_\_\_) \_\_\_\_\_ and \_\_\_\_\_

It is the duty of the committee to visit the Petitioner, to make a strict examination into the moral qualifications and Masonic standing or relationship, or International Order of Rainbow for Girls or International Order of Job's Daughters qualification of the applicant, and to report thereon to the Worthy Matron at or before the next meeting of the Chapter to be held on \_\_\_\_\_.

You are/are not designated as the member of the Examining Committee to ask the questions on the reverse side of this form.

You are/are not designated as the Master Mason to review the Masonic standing of the applicant or the applicant's relative.

\_\_\_\_\_  
Worthy Matron

## REPORT OF COMMITTEE ON PETITION FOR INITIATION

Having made a strict and careful examination, I hereby report \_\_\_\_\_ favorably as to character and \_\_\_\_\_ favorably as to eligibility. (There must be exhibited to the committeeman documentary evidence of (1) the required Masonic affiliation, as follows: Either (a) a certificate, under seal of a regular Masonic lodge, dated within three months prior thereto, of the good standing of the Masonic petitioner or required relative; or, if the relative is deceased, a certificate of his good standing at the time of his death; or (b) a current receipt for Masonic dues, supported by the oral or written statement of the Mason that he is actually in good standing at the time; OR (2) Majority Certificate for the International Order of (a) Rainbow for Girls, or (b) Job's Daughters, or (3) satisfactory proof of 3 years' active membership in either the International Order of (a) Rainbow for Girls, or (b) Job's Daughters.)

\_\_\_\_\_  
Member of Committee

## REPORT OF COMMITTEE ON PETITION FOR AFFILIATION OR REINSTATEMENT

Having made a strict and careful examination, I hereby report \_\_\_\_\_ favorably as to character and \_\_\_\_\_ favorably as to eligibility. (NOTE. Evidence of the Masonic standing of a male relative does NOT have to be exhibited by a Sister applying for affiliation or reinstatement, but MUST be exhibited by Brothers in the form required above as on their petition for initiation.)

Dated at \_\_\_\_\_, California \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Member of Committee

2003/slw

Report on Petition  
(front)(Mandatory)

The member of the Examining Committee designated by the Worthy Matron must ask the applicant the following questions and the answers thereto must be written in the spaces provided:

**QUESTIONS TO BE ASKED OF AN APPLICANT FOR INITIATION**

Where were you born? \_\_\_\_\_

How long have you lived in California? \_\_\_\_\_

Do you believe in a Supreme Being? \_\_\_\_\_

What benefit do you expect to derive in becoming a member of the Order of the Eastern Star?

\_\_\_\_\_  
\_\_\_\_\_

Do you know of any legal, religious or moral reason preventing:

(a) your fidelity to the obligation of the Order? \_\_\_\_\_

or (b) your obedience to the Constitution and Laws of the United States of America?

\_\_\_\_\_

Have you ever been adjudged an habitual criminal or had a final conviction of a felony under the law of any State or of the U.S.A.? \_\_\_\_\_

The Master Mason on the Investigating Committee shall ask the female applicant to show the current dues receipt or certificate of good standing of the related Master Mason, OR the designated member of the committee shall ask to see either (1) the Certificate of Majority in the International Order of (a) Rainbow for Girls, or (b) Job's Daughters, or (2) satisfactory proof of three years' active membership in the International Order of (a) Rainbow for Girls or (b) Job's Daughters. The Master Mason on the investigating committee shall ask the male applicant to show his current dues receipt.

Name of Lodge: \_\_\_\_\_ No. \_\_\_\_\_

Name on receipt: \_\_\_\_\_

Date: \_\_\_\_\_, 20\_\_\_\_ Dues Paid: \_\_\_\_\_, 20\_\_\_\_

Majority Certificate \_\_\_\_\_ OR proof of three (3) years' active membership \_\_\_\_\_

for the International Order of (a) Rainbow for Girls \_\_\_\_\_ or (b) Job's Daughters \_\_\_\_\_

**QUESTIONS TO BE ASKED OF AN APPLICANT FOR AFFILIATION:**

What were your reasons for leaving your former Chapter? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

What is your reason for wishing to affiliate with this Chapter? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Report on Petition  
(back)(Mandatory)

## **Order of the Eastern Star**

### **INSTRUCTIONS FOR MEMBERS OF THE INVESTIGATING COMMITTEE**

INVESTIGATING A PETITION IS A PRIVILEGE AND AN HONOR.

This Committee is secret; so do not give any information to anyone but your Worthy Matron. Please instruct the petitioner not to disclose the name of the investigators.

Return the investigating blank to the Worthy Matron on or before the set date, by mail or in person.

Make an appointment to see the petitioner personally. Do not delay after getting the blank. NEVER conduct your investigation by telephone.

ONLY THE BROTHER on the investigating committee must see a Masonic receipt, or investigate Masonic affiliation.

ANY designated member on the investigating committee may verify the Certificate of Majority from, or evidence of three years' active membership in, the International Order of Rainbow for Girls or the International Order of Job's Daughters.

Answer all questions that have not been crossed off, and sign the investigating blank.

If you have any questions concerning your duties on this committee, contact ONLY the Worthy Matron.

If you cannot make this investigation, call the Worthy Matron immediately.

The Sisters shall instruct the petitioner in the correct dress for initiation. Appropriate dressy clothing may be either long or short dresses for the ladies. For men a suit or sport jacket and tie is appropriate. In some Chapters very formal attire may be suitable. It is NOT traditional for ladies to wear hats, gloves, or pant suits for initiation.

Any presentations may be made following the meeting.

Inform your Worthy Matron by telephone that you have completed the investigation, so that she may be ready to act upon the petition at the next meeting.

DO NOT TELL the petitioner when they will be initiated.

READ YOUR REPORT CAREFULLY.

2004/slw

Instructions for Members of the Investigating Committee



# Order of the Eastern Star



From: The Office of the Secretary of \_\_\_\_\_ Chapter No. \_\_\_\_\_

## Notice of Election to Become a Member by Affiliation

To: \_\_\_\_\_

At a meeting of the above named Chapter held on \_\_\_\_\_ 20\_\_\_\_, you were elected to membership by Affiliation. We look forward to having you as a member of our Chapter. Please be present to sign the bylaws and for introduction on :

\_\_\_\_\_, 20\_\_\_\_ at \_\_\_\_\_ am/pm at \_\_\_\_\_

If, for any reason, you cannot attend this meeting, you must immediately contact the Worthy Matron at the address listed below.

The Worthy Matron has chosen to have the Chapter perform the Affiliation Ceremony for you. Please wear appropriate clothing for the ceremony. Ladies should wear a long or short dress; however, a skirt and blouse will suffice. Gentlemen should wear a suit or a sport jacket and tie. You may want to wear comfortable shoes.

The dues of this Chapter are \$ \_\_\_\_\_ per year, plus any assessments by the Grand Chapter. The Grand Chapter assessments are currently \$ \_\_\_\_\_. You should bring a check totaling \$ \_\_\_\_\_, for \$ \_\_\_\_\_ in Grand Chapter assessments and \$ \_\_\_\_\_ in prorated dues, with you to your Affiliation. It should be made payable to this Chapter and be given to the Secretary before the meeting.

If you do not already have one, you may obtain a Life Sponsorship in the Eastern Star Home by a donation of \$50.00 to the Grand Chapter Endowment Fund. This Life Sponsorship will exempt you, in any Chapter in which you may be a member, from assessments by the Grand Chapter for the support and maintenance of the Eastern Star Home.

You may purchase a life membership in this Chapter for the sum of \$ \_\_\_\_\_. This life membership will exempt you from payment of dues to this Chapter.

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

2008/03/24 jph last change 2008/03/24

(local)

\_\_\_\_\_  
Worthy Matron (print name)

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

### Notice of Election — Affiliation (Optional)

# Order of the Eastern Star



From: The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_

## Notice of Election to Receive the Degrees by Initiation

To: \_\_\_\_\_

At a meeting of the above named Chapter held on \_\_\_\_\_, 20\_\_\_\_, you were elected to receive the degrees of the Order. We look forward to having you as a member of our Chapter. Please be present for Initiation on:

\_\_\_\_\_, 20\_\_\_\_ at \_\_\_\_\_ am/pm at \_\_\_\_\_.

If, for any reason, you cannot attend your initiation, you must immediately contact the Worthy Matron of this Chapter at the address listed below.

Appropriate clothing should be worn for your initiation. Ladies should wear a long or short dress; however, a skirt and blouse will suffice. Gentlemen should wear a suit or a sport jacket and tie. You may want to wear comfortable shoes for your Initiation — you will be standing and walking some. Members of the Order do not wear hats or gloves at Chapter meetings.

The dues of this Chapter are \$\_\_\_\_\_ per year, plus any assessments by the Grand Chapter. The Grand Chapter assessments are currently \$\_\_\_\_\_. You should bring a check totaling \$\_\_\_\_\_ for \$\_\_\_\_\_ in Grand Chapter assessments and \$\_\_\_\_\_ in prorated dues, with you to your Initiation. It should be made payable to this Chapter and be given to the Secretary before the meeting.

You may obtain a Life Sponsorship in the Eastern Star Home by a donation of \$50.00 to the Grand Chapter Endowment Fund. This Life Sponsorship will exempt you from assessments by the Grand Chapter for the support and maintenance of the Eastern Star Home.

You may purchase a life membership in this Chapter for the sum of \$\_\_\_\_\_. This life membership will exempt you from payment of dues to this Chapter.

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

Email

2008/03/24/pt last change 2009/02/27

(local)

\_\_\_\_\_  
Worthy Matron (print name)

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

Notice of Election — Initiation  
(Optional)

at

# Order of the Eastern Star



From: The Office of the Secretary of  
\_\_\_\_\_ Chapter No. \_\_\_\_\_

## Notice of Rejection

To: \_\_\_\_\_

You are hereby notified that your petition for membership in the above named chapter was rejected at the meeting held on the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

If you submitted a Petition for Initiation, you may not submit another Petition for Initiation at this or any other Chapter for two months following this rejection. If you submitted a Petition for Affiliation, you may immediately submit a new Petition for Affiliation at any Chapter. See Section 223 of the Constitution and Laws of the Grand Chapter of California below.

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_, \_\_\_\_\_, California.

\_\_\_\_\_  
Secretary

(au1)

Sec. 223. **EFFECT OF REJECTION; NEW PETITION DEFERRED.** No petitioner for initiation rejected by any Chapter of the Order shall present a petition to the same or any other Chapter, nor shall such Chapter receive the same, within two months after such rejection. A petitioner for affiliation, if rejected, may apply again to the same Chapter or any other Chapter at any subsequent stated meeting. Following rejection of a previous petition a new petition must be presented, received and referred to a new committee of investigation. Any person having been rejected in one Chapter, who presents a petition to another before the expiration of such time, shall be deemed guilty of deception, and any election based thereon shall be null and void. This paragraph shall be printed on all notices of rejection.  
General Grand Chapter 2000 – Bylaws Chapter VI, Sections 3 (b) & 4

**Standing Unaffected.** The rejection of a petition for affiliation does not affect his standing in the Order or in his Chapter, provided no demit has been issued.

au/01/2004      last change 08/10/2004

Notice of Rejection  
(Optional)

# Order/Request Forms

ORDER FORM / PRICE LIST – April 11, 2009  
(Please destroy all earlier versions)

Chapter Name \_\_\_\_\_ No. \_\_\_\_\_

Date \_\_\_\_\_ Secretary \_\_\_\_\_

Description	Price	Quantity	Amount
<b>BALLOT BALLS / BLACK CUBES</b>			
White Balls	3.00/ten		
Black Cubes	3.00/six		
<b>BIBLE</b> (White, Small approx. 4" x 6")	40.00/each		
<b>BINDER</b> With Star insert for front cover			
White – Plain – ½ inch – for Instruction Book only	12.00/each		
White – Plain – 1 inch – for Constitution and Laws only	12.00/each		
White – Plain – 2 inch – for both IB and C&L	15.00/each		
<b>BYLAW BOOK</b>	60.00/each		
<b>CD OF C&amp;L AND IB</b> in PDF format ( <i>must be repurchased annually</i> )	5.00/each		
<b>CERTIFICATES</b>			
Honorary Membership	1.00/each		
Paid Life Membership	1.00/each		
<b>CONSTITUTION AND LAWS – COMPLETE THROUGH 2008</b>	23.00/each		
2008 Amendments for 2007 Reprint C&L	4.00/each		
<b>FORMS</b>			
Certificate of Discontinuance of Multiple Membership – 2004	2.00/dozen		
Certificate of Good Standing – 2004	2.00/dozen		
Certificate of Restoration – 2004	2.00/dozen		
Demit – 2004	2.00/dozen		
Fraternal Greetings – 2005	2.00/dozen		
Instructions for Members of Investigating Committee – 2003	2.00/dozen		
Notice of Annual Election – 2004	2.00/dozen		
Notice of Delinquent Dues – 2004	2.00/dozen		
Notice of Dues – 2004	2.00/dozen		
Notice of Election for Affiliation – 2005	2.00/dozen		
Notice of Election for Degrees (Initiation) – 2005	2.00/dozen		
Notice of Rejection – 2004	2.00/dozen		
Notice of Special Election – 2004	2.00/dozen		
Notice of Suspension: Dues – 2004; ( ) Masonic Standing – 2005; ( ) Dual – 2005	2.00/dozen		
Notification of Discontinuance of Multiple Membership – 2004	2.00/dozen		
Notification of Member Relocation – 2004	2.00/dozen		
Notification of Plural or Dual Membership – 2004	2.00/dozen		
Notification of Restoration of Dual Member – 2004	2.00/dozen		
Notification of Suspension of Dual Member – 2004	2.00/dozen		
Petition for Affiliation – 2008	2.00/dozen		
Petition for Initiation – 2008	2.00/dozen		
Petition for Reinstatement – 2003	2.00/dozen		
Reminder of Dues – 2004	2.00/dozen		
Report on Petition (Investigation Committee) – 2001	2.00/dozen		
Request for Demit – 2004	2.00/dozen		
Summary of Bills – 2002	2.00/dozen		
Summary of Receipts – 2005; ( ) Summary of Receipts continuation page - 2005	2.00/dozen		
Verification of Membership – 2003	2.00/dozen		
<b>INSTRUCTION BOOK – COMPLETE THROUGH 2006</b> (latest for 2008)	8.00/each		
2008 Amendments for 2006 Reprint IB	N/A		
<b>JEWELS FOR OFFICERS</b> Complete sets & other sizes/styles available – ask for price.			
Individual Badge, 2 1/8" Gold Plate, specify Office:	40.00/each		
Individual Badge, 2 1/8" Enameled, specify Office:	60.00/each		
<b>LEDGER</b>			
Binder	50.00/each		
Index Pages	20.00/set		
Membership Pages (white)	7.00/dozen		
Cash Pages (yellow)	7.00/dozen		
Recap Pages (blue)	5.00/dozen		
<b>MINUTE BOOK</b>			
Bound – 8 1/4" x 10 3/4"	50.00/each		
Bound – 8 1/2" x 14"	70.00/each		
Loose-leaf – 8 1/2" x 11"	125.00/each		
<b>OFFICERS' ROLL CALL BOOK</b>	40.00/each		
<b>TOTAL FOR PAGE ONE – CARRY FORWARD TO PAGE TWO</b>			\$

Order Form  
(front)

Description	Price	Quantity	Amount
<b>PAMPHLETS</b>			
Foundation Brochures	Free		
New Member Booklet	\$6.00/six	2.00/each	
Prospective Member Tri-Fold	\$10.00/fifty	3.00/dozen	
Questions and Answers Based on the Constitution and Laws	TBA		
<b>RED BOOK</b> – General Grand Chapter Constitution and Laws (2006)	40.00/each		
Updates through 2006	17.00/each		
<b>REGISTER</b> For Members and Visitors	60.00/each		
<b>REPLACEMENT PINS, 25-YEAR and 50-YEAR</b> (Please Specify below.)			
<b>Only REPLACEMENT pins may be ordered on this form.</b>			
<b>25</b> Name:	Member No.:	6.00/each	
<b>50</b> Name:	Member No.:	6.00/each	
<b>RIBBONS</b>			
Star Points' Initiation Ribbons	20.00/set		
1½" Wide Ribbon, Star Point Colors	2.00/yard		
1" Wide Ribbon, Star Point Colors, For Badges	1.00/yard		
Individual Cords for Officer's Badges (Ask for price of complete set.)	23.00/each		
<b>RITUALS</b>			
<b>2006</b> large-print, <b>White</b> or <b>Maroon</b> , please specify:	30.00/each		
<b>2006</b> regular-print, Beige Cloth	23.00/each		
Stickers for Large Ritual, <b>2003</b> → <b>2006</b>	4.00/set		
Stickers for Regular Ritual, <b>2003</b> → <b>2006</b>	4.00/set		
Ritual Cover for large-print Ritual, White only	N/A		
Ritual Cover for regular-print Ritual, White only	N/A		
<b>RITUAL - Replacement for Lost - Indicate Officer: W.P. - A.P. - COND.</b>	50.00/each		
<b>ROSTER FOR GRAND CHAPTER 2009</b> (spiral bound)	13.00/set		
<b>SEALS</b>			
Pocket Seal	60.00/each		
Desk Seal	70.00/each		
Chapter Name:	No.:		
Date Instituted:	City Meeting in:		
<b>SECRET WORK</b> (replaced at no charge if damaged one returned)			
Replacement for lost, <b>Indicate Officer: W.P. - A.P. - COND. - A. COND.</b>	25.00/each		
Exchange Size: extra charge for Large Print replacement of Small Print	5.00/each		
<b>SECRETARY AND TREASURER HANDBOOK</b>	7.00/each		
<b>TREASURER'S CASH BOOK</b>	55.00/each		
<b>TREASURER'S RECEIPT BOOK</b>	6.00/each		
<b>UNIFORM CODE OF BYLAWS – 2008</b>	2.00/dozen		
<b>VEILS</b> for Adah			
Small, 54" long x 20" wide	32.00/each		
Large, 54" long x 40" wide	48.00/each		
<b>ENGRAVING</b> – Regular print is 29 characters per line, small print is 34 characters per line. Engrave as follows:	25.00/per line		
<b>TOTAL FOR PAGE TWO</b>			\$
<b>TOTAL FORWARDED FROM PAGE ONE</b>			\$
<b>TOTAL OF ORDER</b>			\$
<b>LESS CREDIT MEMO</b>			\$( )
<b>TOTAL DUE GRAND CHAPTER OF CALIFORNIA FOR ORDER</b>	CHECK NO.		\$
<b>Remittance must accompany orders. Allow 30 days for delivery.</b>			

Available at **no charge** if ordered with other supplies; if not, price is \$2.00 per dozen or \$.25 each. **Specify quantity of form(s):**

( ) Address Change Form ( ) International Temple Fund Receipts ( ) Member's Résumé  
 ( ) Approval of Amendments to Bylaws ( ) Officer Addition/Change Form ( ) Request for Special Dispensation  
 ( ) Check Transmittal Forms ( ) Proficiency Certificates ( ) Star Plus Acknowledgement Cards  
 ( ) Request for Insurance Rider ( ) 25-year Award Request form ( ) Benevolent Applications  
 ( ) Contribution Cards, Specify Type: ( ) 50-year Award Request form ( ) Cancer Assistance Application  
 ( ) 75-year Award Request form ( ) Label Order  
 ( ) Service Award Order form ( ) Dr. Rob Morris Award Order Form

Ship to: \_\_\_\_\_, Secretary  
 \_\_\_\_\_ Chapter No. \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Send This Form to:**  
 Grand Chapter of California, O.E.S.  
 16960 Bastanchury Road, Suite E  
 Yorba Linda, CA 92886-1711

2009/dec last change 2009-04-11 - Garden Spring Green

Order Form  
(back)

## DR. ROB MORRIS AWARD PROGRAM

Sec. 79A **DR. ROB MORRIS AWARD PROGRAM.** Subordinate Chapters may voluntarily participate in the Dr. Rob Morris Award Program by which recognition may be given for special service to a Sister or Brother who is a member of the subordinate Chapter and who has not previously served in the capacity of a Worthy Matron or Worthy Patron for a sufficient period as to be recognized as a "Past Matron" or a "Past Patron", provided however, no person currently serving as Worthy Matron or Worthy Patron shall be considered for this award. **NO MORE THAN ONE SUCH MEMBER** may be so recognized by each subordinate Chapter in any year. **Such recognition shall be memorialized by a Dr. Rob Morris Award Certificate and Pin.** The subordinate Chapter shall purchase such certificate and pin from the Grand Chapter. The method of selecting recipients and the manner of presentation shall be determined by the subordinate chapter giving the award.

### ORDER FORM for DR. ROB MORRIS AWARD

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

wishes to present a Dr. Rob Morris Certificate of Merit to:

\_\_\_\_\_ (Please Print Name) \_\_\_\_\_ (Membership Number)

which will be presented on \_\_\_\_\_, 20\_\_\_\_\_

Send this form and your check made payable to "GRAND CHAPTER OF CALIFORNIA" to the Grand Chapter office, 16960 Bastanchury Road, Suite E, Yorba Linda, California 92886-1711.

Lapel Pin and Certificate	\$6.00	\$	_____
Charm and Certificate	\$6.00	\$	_____
Replacement Lapel Pin	\$4.00 each	\$	_____
Replacement Charm	\$4.00 each	\$	_____
Replacement Certificate	\$2.00 each	\$	_____

Total amount enclosed \$ \_\_\_\_\_

Check Number \_\_\_\_\_

Mail to:

\_\_\_\_\_  
\_\_\_\_\_

(Seal)

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

\_\_\_\_\_ Chapter Secretary

Dr. Rob Morris Award Request



GRAND CHAPTER OF CALIFORNIA  
Order of the Eastern Star

**REQUEST FOR TWENTY-FIVE-YEAR EMBLEM AND CERTIFICATE**

PLEASE TYPE OR PRINT NEATLY

From: \_\_\_\_\_ Chapter No. \_\_\_\_\_

I hereby request twenty-five-year pin(s) and certificate(s) for:

Name	Membership No.	Stated Meeting Date Twenty-five Year Award Presentation Approved	V.O.M. Attached*
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If more lines are needed, use the back of this sheet.

\*V.O.M. — VERIFICATION OF MEMBERSHIP REQUIRED: if any part of the membership is in another jurisdiction, the Chapter Secretary shall write to the Grand Secretary of that jurisdiction, obtain the date of initiation/affiliation, the date of the demit, and IF THE MEMBERSHIP WAS CONTINUOUS. Send a COPY of the verification with this request.

Make check payable to: GRAND CHAPTER OF CALIFORNIA, OES

\_\_\_\_\_ Twenty-five-year pins WITH certificates @ \$6.00 each     \$ \_\_\_\_\_  
 \_\_\_\_\_ Twenty-five-year Certificates ONLY @ \$1.00 each     \$ \_\_\_\_\_  
 TOTAL ENCLOSED     \$ \_\_\_\_\_  
 CHECK NUMBER     \_\_\_\_\_

(Seal)

\_\_\_\_\_  
Secretary  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
Telephone

Date of Presentation: \_\_\_\_\_

Date: \_\_\_\_\_, 20\_\_\_\_

**Allow one month for processing.**

2009/06/11 jth Salmon last change 2009/06/11

25-year Request Form  
(salmon)



GRAND CHAPTER OF CALIFORNIA  
Order of the Eastern Star

**REQUEST FOR FIFTY YEAR EMBLEM AND CERTIFICATE**

PLEASE TYPE OR PRINT NEATLY

From: \_\_\_\_\_ Chapter No. \_\_\_\_\_

I hereby request fifty-year pin(s) and certificate(s) for:

Name	Membership No.	Stated Meeting Date Life Membership Approved	V.O.M. Attached*
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If more lines are needed, use the back of this sheet.

\*V.O.M. — VERIFICATION OF MEMBERSHIP REQUIRED: if any part of the membership is in another jurisdiction, the Chapter Secretary shall write to the Grand Secretary of that jurisdiction, obtain the date of initiation/affiliation, the date of the demit, and IF THE MEMBERSHIP WAS CONTINUOUS. Send a COPY of the verification with this request.

Make check payable to: GRAND CHAPTER OF CALIFORNIA, OES

_____ Fifty-year pins WITH certificates @ \$6.00 each	\$ _____
_____ Fifty-year Certificates ONLY @ \$1.00 each	\$ _____
_____ Life Membership Certificates ONLY @ \$1.00 each	\$ _____
TOTAL ENCLOSED	\$ _____
CHECK NUMBER	_____

(Seal)

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

Date of Presentation: \_\_\_\_\_

Date: \_\_\_\_\_, 20 \_\_\_\_\_

**Allow one month for processing.**

2009/06/11 jh Canary list change 2009/06/11

50-year Request Form  
(canary)

GRAND CHAPTER OF CALIFORNIA  
Order of the Eastern Star

**REQUEST FOR SEVENTY-FIVE-YEAR EMBLEM AND CERTIFICATE**

PLEASE TYPE OR PRINT NEATLY

From: \_\_\_\_\_ Chapter No. \_\_\_\_\_

I hereby request seventy-five-year pin(s) and certificate(s) for:

Name	Membership No.	Stated Meeting Date Seventy-five Year Award Presentation Approved	V.O.M. Attached*
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If more lines are needed, use the back of this sheet.

\* V.O.M. — VERIFICATION OF MEMBERSHIP REQUIRED: if any part of the membership is in another jurisdiction, the Chapter Secretary shall write to the Grand Secretary of that jurisdiction, obtain the date of initiation/affiliation, the date of the demit, and IF THE MEMBERSHIP WAS CONTINUOUS. Send a COPY of the verification with this request.

(Seal)

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

Date of Presentation: \_\_\_\_\_

Date: \_\_\_\_\_, 20 \_\_\_\_\_

**Allow one month for processing.**

2009/06/11 jh Grey last change 2009/06/11

75-year Request Form

## Life Sponsorship / Star Plus Order Form



Date \_\_\_\_\_

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

Enclosed is our check number: \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ payable to the **Grand Chapter Endowment Fund** for the following:

Member Number	Note	Member Name	Cert. Type	Donation Amount

**If you do not know the member number, please leave the member number column blank** — we will fill it in. Instead place one of the following in the note column: an "I" if the member is an initiate; an "A" if the member is a new affiliate; or a "U" if you just don't know the member number.

In the column "Cert. Type", please enter one of the following: L — Life Sponsorship; C — Star Plus Certificate; S — Star Plus gold seal (member already has a certificate). If you don't know, leave the cell blank, and we will figure it out.

The check must be for at least \$50.00 for each Life Sponsorship/Star Plus. Mail this form and check to the Grand Chapter office:

16960 Bastanchury Rd., Ste. E, Yorba Linda, CA 92886-1711

The certificates will be sent to the following address:

(S+4)

Secretary \_\_\_\_\_

If you would like to present these certificates on a specific date, please list that date here.

Address \_\_\_\_\_

City / Zip \_\_\_\_\_

Presentation Date: \_\_\_\_\_

Phone \_\_\_\_\_

2008/09/08 jrh Green last change 2008/09/08

## Life Sponsorship / Star Plus Order Form

This page is intentionally left blank.

**REQUEST FOR A SPECIAL DISPENSATION**

Grand Chapter of California  
Order of the Eastern Star

\_\_\_\_\_, 20\_\_\_\_  
(City) (Date)

To: \_\_\_\_\_  
Worthy Grand Matron of the Grand Chapter of California, Order of the Eastern Star

At the stated meeting of \_\_\_\_\_ Chapter, No. \_\_\_\_\_  
held on \_\_\_\_\_, 20\_\_\_\_, it was:

A. regularly moved, seconded and **UNANIMOUSLY CARRIED BY BALLOT BOX** (per Sec. 207) that a Special Dispensation regarding action upon **the petition of:**

\_\_\_\_\_  
(Give name in full)  
\_\_\_\_\_, a member of  
(Relationship) of \_\_\_\_\_  
**Lodge No. \_\_\_\_\_ F.&A.M. of \_\_\_\_\_**  
(City) (State)  
**Assembly No. \_\_\_\_\_ I.O.R.G. of \_\_\_\_\_**  
**Bethel No. \_\_\_\_\_ I.O.J.D. of \_\_\_\_\_**

be requested to:

- Ballot upon and initiate the same meeting. Meeting to be held \_\_\_\_\_  
Stated Meeting nights are \_\_\_\_\_ and \_\_\_\_\_  
(Day of week)  
Reason for the above request: \_\_\_\_\_
- Re-ballot upon.
- Receive, after waiver of jurisdiction, on account of residence in another Grand Jurisdiction.

B. on the above date, it was regularly moved, seconded and carried by majority vote:

**Specify reason for request for 3 or 4:** \_\_\_\_\_

- To hold the ANNUAL **election** of Officers at a time not authorized by Grand Chapter laws. To-wit:  
on the \_\_\_\_\_ of \_\_\_\_\_, 20\_\_\_\_
- To hold the ANNUAL **installation** of Officers after the thirtieth of November. To-wit:  
on the \_\_\_\_\_ of \_\_\_\_\_, 20\_\_\_\_
- To contribute in one year more than \$200 to any youth organization without a Masonic affiliation or more than \$500 to a Masonic youth organization. Specify amount \$ \_\_\_\_\_  
Organization \_\_\_\_\_ Purpose \_\_\_\_\_
- To contribute to any Fraternal Organization or to any Fraternal Hall Association for any purpose.  
Specify amount \$ \_\_\_\_\_, Organization \_\_\_\_\_  
Purpose \_\_\_\_\_  
(If over \$ 1,000 include copy of Chapter's last audit report.)
- To change the place of any stated meeting of a subordinate chapter from the location stated in said chapter's bylaws. Location: \_\_\_\_\_  
Reason: \_\_\_\_\_

(Seal)

\_\_\_\_\_  
(Secretary)

\_\_\_\_\_  
(Address)

FEE OF \$5.00 FOR EACH NAME MUST ACCOMPANY REQUESTS FOR NOS. 1, 2 and 5. No fee for Nos. 3 and 4, if necessary for cause beyond the control of the chapter, or for Nos. 6, 7 and 8. (Sec. 206)

2008/01/08 mjb last change 2008/01/08

Request for Special Dispensation

## 2008 CREDENTIALS REQUEST FORM

**IMPORTANT:** This page will be used in Credentials at Grand Chapter and for the issuing of ballots. **CAREFULLY** list only the names of those members who have paid for Credentials and who will actually attend Grand Chapter. Plural members are listed **ONLY** in the Chapter in which the Credential is purchased. (Section 191 C & L) **CREDENTIALS ARE \$15.00 PER PERSON**

Members of \_\_\_\_\_ Chapter No. \_\_\_\_\_

**Do Not Write in This Column**

Registered	Officer	Name	Other Title	Plural Chapter No.	Member No.
	W. M.				
	W. P.				
	A. M.				
	A. P.				
	Cond.				
	A. C.				
	Secretary				
	Treasurer				

**Do Not Write in This Column**

Registered	Member Name	Current Office	Title	Plural Chapter No.	Member No.
	1				
	2				
	3				
	4				
	5				
	6				
	7				
	8				
	9				
	10				
	11				
	12				
	13				
	14				
	15				
	16				
	17				
	18				
	19				
	20				

Credential Order Form  
(front)

**Do Not Write in This Column**

Registered	Member Name	Current Office	Title	Plural Chapter No.	Member No.
	21				
	22				
	23				
	24				
	25				
	26				
	27				
	28				
	29				
	30				
	31				
	32				
	33				
	34				

You will be sent six Legislative Booklets when they are printed later this year. If you have more than six members purchasing credentials, you should request additional booklets for them.

**PLEASE SEND \_\_\_\_\_ ADDITIONAL LEGISLATIVE BOOKLETS FOR THE ABOVE MEMBERS.**

**Important:** Please advise your members that there will be **NO REFUNDS** for unused or lost credentials.

I, \_\_\_\_\_, (please PRINT name in space provided) Secretary of the above named Chapter, hereby certify that the foregoing named Elected and Installed Officers, and members are eligible to register and vote at the coming session of Grand Chapter.

**Important:** If you wish to order additional Credentials and Legislative Booklets, please submit the request in the form of a letter from the Secretary, and over the Seal of the Chapter. Deadline for pre-ordering Credentials is September 28, 2008.

\_\_\_\_\_ (Seal)  
 Date \_\_\_\_\_ Signature of Secretary \_\_\_\_\_

Retain a duplicate of this form so you will have evidence, if needed, of the names and of the amount of money sent.

Please remember, Credentials will not be mailed back to you. Credentials will be held at the Registration area, by Chapter number, in the Fresno Convention Center.

**DO NOT -- FOR ANY REASON WHATSOEVER -- WRITE BELOW THIS DOTTED LINE:**

**FOR GRAND CHAPTER OFFICE USE ONLY:** Chapter \_\_\_\_\_ No. \_\_\_\_\_

Date payment received: \_\_\_\_\_

Total Number of Credentials Ordered \_\_\_\_\_ @ \$15.00 each. Paid by Check No. \_\_\_\_\_ Amount \$ \_\_\_\_\_

\_\_\_\_\_ Additional Credentials Ordered \_\_\_\_\_ @ \$15.00 each. Paid by Check No. \_\_\_\_\_ Amount \$ \_\_\_\_\_

\_\_\_\_\_ Additional Credentials Ordered \_\_\_\_\_ @ \$15.00 each. Paid by Check No. \_\_\_\_\_ Amount \$ \_\_\_\_\_

Date Additional Books Mailed: \_\_\_\_\_ Date Additional Books Mailed: \_\_\_\_\_

2008/09


Credential Order Form  
 (back)






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# Certificates



**Honorary Membership Certificate**

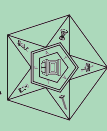


**This is to Certify** that at the stated meeting of  
 Chapter No. \_\_\_\_\_, O.E.S., held at  
 \_\_\_\_\_, California on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_  
 \_\_\_\_\_  
 a member of \_\_\_\_\_ Chapter No. \_\_\_\_\_  
 of \_\_\_\_\_ was elected an  
**Honorary Member**  
 of this chapter and is entitled to all of the rights and privileges of such  
 membership.  
**In Testimony Whereof** we have hereunto set our hands  
 and affixed the Seal of  
 \_\_\_\_\_ Chapter No. \_\_\_\_\_  
 this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_ Worthy Patron  
 \_\_\_\_\_ Worthy Patron  
 \_\_\_\_\_ Secretary



**Grand Chapter of California  
Order of the Eastern Star**

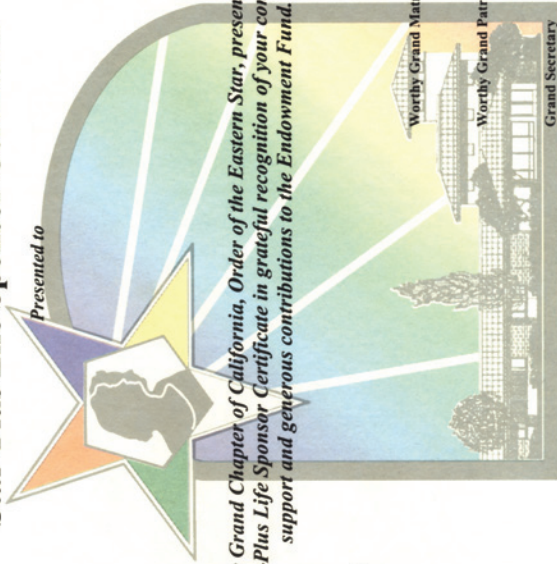


**This is to Certify** that  
 that on the \_\_\_\_\_ day of \_\_\_\_\_ the sum of  
 \$50.00 was contributed to the Endowment Fund by or on behalf of  
 \_\_\_\_\_ Chapter No. \_\_\_\_\_  
 a member of \_\_\_\_\_  
 who shall henceforth have the title  
**Life Sponsor of the Eastern Star Home**  
 and shall hereafter be exempt from any future assessments that  
 might be levied by the Grand Chapter for support and maintenance  
 of the Eastern Star Home.  
**In Testimony Whereof** we have hereunto set our hands  
 and affixed the Seal of the Grand Chapter of California  
 this \_\_\_\_\_ day of \_\_\_\_\_

\_\_\_\_\_ Worthy Grand Master  
 \_\_\_\_\_ Worthy Grand Patron  
 \_\_\_\_\_ Grand Secretary

Life Sponsorship Certificate

# Star-Plus Life Sponsor Certificate



Dated:

Star Plus Certificate

Endowment Fund Chairman


  
 Grand Chapter of California  
 Order of the Eastern Star

This is to Certify that

\_\_\_\_\_ Chapter No. \_\_\_\_\_  
 was initiated in \_\_\_\_\_  
 Order of the Eastern Star, \_\_\_\_\_  
 on \_\_\_\_\_ and has been a

**Member in Good Standing in the Order for  
Twenty-Five Years**

In Testimony Whereof, we have hereunto  
 set our hands and affixed the Seal of  
 this \_\_\_\_\_ Chapter No. \_\_\_\_\_  
 this \_\_\_\_\_ day of \_\_\_\_\_

\_\_\_\_\_ Worthy Matron  
 \_\_\_\_\_ Worthy Patron  
 \_\_\_\_\_ Secretary

Attest:

25-Year Certificate


  
 Grand Chapter of California  
 Order of the Eastern Star

This is to Certify that

\_\_\_\_\_ Chapter No. \_\_\_\_\_  
 was initiated in \_\_\_\_\_  
 Order of the Eastern Star, \_\_\_\_\_  
 on \_\_\_\_\_ and has been a

**Member in Good Standing in the Order for  
Fifty Years**

In Testimony Whereof, we have hereunto set our hands  
 and affixed the Seal of the Grand Chapter of California  
 this \_\_\_\_\_ day of \_\_\_\_\_

\_\_\_\_\_ Worthy Grand Matron  
 \_\_\_\_\_ Worthy Grand Patron  
 \_\_\_\_\_ Grand Secretary

Attest:

50-Year Certificate

**Grand Chapter of California**  
**Order of the Eastern Star**



This is to Certify that

\_\_\_\_\_ was initiated in \_\_\_\_\_ Chapter No. \_\_\_\_\_  
 \_\_\_\_\_ Order of the Eastern Star, \_\_\_\_\_  
 on \_\_\_\_\_ and has been a

**Member in Good Standing in the Order for**  
**Seventy-Five Years**

In Testimony Whereof, we have hereunto set our hands  
 and affixed the Seal of the Grand Chapter of California  
 this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

\_\_\_\_\_  
 Worthy Grand Master


\_\_\_\_\_  
 Worthy Grand Patron

\_\_\_\_\_  
 Grand Secretary

Attest:

**75-Year Certificate**

**Life Membership Certificate**



*This is to Certify that at the stated meeting of*

Chapter No. \_\_\_\_\_, O.E.S.,  
held at \_\_\_\_\_, California  
on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

*paid the Life Membership fee as required by the bylaws of said Chapter and is therefore exempt from the payment of further dues.*

**In Testimony Whereof** we have  
herunto set our hands and affixed the Seal of  
this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Attest:

\_\_\_\_\_ Worthy Matron  
\_\_\_\_\_ Worthy Patron  
\_\_\_\_\_ Secretary

Paid Life Membership Certificate

**Grand Chapter of California  
Order of the Eastern Star**



**Fifty-Year Life Membership Certificate**

This is to Certify that at the stated meeting of

Chapter No. \_\_\_\_\_, O.E.S.,  
held at \_\_\_\_\_, California  
on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

was made a Life Member in recognition of fifty years membership in the Order,  
as authorized by the Constitution and Laws of the Grand Chapter of California,  
and is therefore exempt from the payment of further dues in this Chapter.

In Testimony Whereof, we have  
herunto set our hands and affixed the Seal of  
this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Attest:

\_\_\_\_\_ Worthy Matron  
\_\_\_\_\_ Worthy Patron  
\_\_\_\_\_ Secretary

50-year Life Membership Certificate (goldenrod)



CERTIFICATE OF PROFICIENCY  
Grand Chapter of California  
Order of the Eastern Star

THIS IS TO CERTIFY THAT

\_\_\_\_\_ of

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

is proficient in the secret work of the Order of the Eastern Star.

(Seal)

\_\_\_\_\_ Date

\_\_\_\_\_ Worthy Patron

Proficiency Certificate

# Donation Acknowledgements



Chapter No. \_\_\_\_\_  
Order of the Eastern Star

A contribution to the \_\_\_\_\_  
of the Grand Chapter of California, Order of the Eastern Star, has been made in honor of

by \_\_\_\_\_  
\_\_\_\_\_

Secretary

## In Honor, Acknowledgement



Chapter No. \_\_\_\_\_  
Order of the Eastern Star

A contribution to the \_\_\_\_\_  
of the Grand Chapter of California, Order of the Eastern Star, has been made in memory of

by \_\_\_\_\_  
\_\_\_\_\_

With sincere sympathy

Secretary

## In Memory, Acknowledgement

	
<i>This is to Certify that</i>	
_____	
<i>has contributed to the International Headquarters Fund of the</i>	
<b>Order of the Eastern Star</b>	
	
<i>Barbara Benton</i> MOST WORTHY GRAND MATRON	<i>William S. Olman</i> MOST WORTHY GRAND PATRON
<i>Alma Lynn Base</i> RIGHT WORTHY GRAND SECRETARY	

## International Headquarters, Receipt





\_\_\_\_\_ Donor \_\_\_\_\_ Date

\_\_\_\_\_ **Chapter No.** \_\_\_\_\_  
**Order of the Eastern Star**

Your \$\_\_\_\_\_ contribution to the following charitable organization:

- California Eastern Star Foundation – \_\_\_\_\_
- Grand Chapter Endowment Fund       Eastern Star Homes of California

in memory/honor of \_\_\_\_\_  
is deeply appreciated and gratefully acknowledged. No goods or services were provided as a consideration for this donation. This donation was made to a 501(c)(3) corporation and may be tax deductible.

\_\_\_\_\_  
Secretary

### Tax Deductible, Acknowledgement

\_\_\_\_\_ Date

\_\_\_\_\_ Donor



\_\_\_\_\_ **Chapter No.** \_\_\_\_\_  
**Order of the Eastern Star**

Your \$\_\_\_\_\_ contribution to \_\_\_\_\_

is deeply appreciated and gratefully acknowledged.

\_\_\_\_\_  
Secretary

This donation is not tax deductible.

### Not Tax Deductible, Acknowledgement

Donor: \_\_\_\_\_



Date: \_\_\_\_\_

\_\_\_\_\_ **Chapter No.** \_\_\_\_\_  
**Order of the Eastern Star**

A contribution in the amount of \$\_\_\_\_\_ has been made by you or on your behalf to the Endowment Fund.

Any contribution of \$50.00 or more to the Endowment Fund, beyond the Life Sponsor donation, entitles you to recognition with a **Star-Plus Certificate**, and a gold star for every additional \$50.00.

No goods or services were provided as a consideration for this donation. This donation was made to a 501(c)(3) organization and may be tax deductible.

\_\_\_\_\_  
Secretary

### Star Plus, Acknowledgement

# Reports

Report of \_\_\_\_\_ Chapter No. \_\_\_\_\_

TO THE  
Grand Chapter of California  
Order of the Eastern Star

Period Ending June 30, 20\_\_\_\_

City: \_\_\_\_\_  
County: \_\_\_\_\_

Meetings are on: \_\_\_\_\_  
Exceptions: \_\_\_\_\_  
\_\_\_\_\_

Hall: \_\_\_\_\_  
Location of Hall: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_

Fees: Initiation: \$ \_\_\_\_\_ Affiliation: \$ \_\_\_\_\_ Dues: \$ \_\_\_\_\_

Federal Identification Number: \_\_\_\_\_  
E.D.D. Number: \_\_\_\_\_

## INSTRUCTIONS FOR ANNUAL REPORT

This Annual Report is delinquent after July 15, 20\_\_\_\_. In the absence of either the Worthy Matron, Worthy Patron, or Secretary, **the report should be signed by the person preparing the report.**

Per Capita and Assessments are to be paid upon receipt of the Annual Billing from Grand Chapter based on this report. Per Capita assessments are delinquent **AFTER** September 01, 20\_\_\_\_.

The Worthy Matron, without a vote of the Chapter, can direct the Secretary to make payment of the amount due the Grand Chapter for dues, fees, and assessments, which the Constitution requires. Chapters whose fees are delinquent in the office of the Grand Secretary are liable for five (5%) of the total bill.

Maryann Barrios  
Grand Secretary

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

## GRAND CHAPTER DUES, FEES, AND HOME ASSESSMENT

When this report is returned to the Grand Chapter office, the computer will figure the amount owed as follows:

- \$4.00 on each member
- \$0.45 on each member for the Benevolent Fund
- \$0.10 on each member for the Scholarship Fund
- \$0.25 on each member for the Convention Fund
- \$5.75 on each member for the Insurance Fund
- \$1.00 on each member for Home Maintenance
- \$0.50 on each member initiated and affiliated in this report
- \$15.00 on each member initiated and out of state affiliates in this report for the Grand Chapter Endowment Fund
- \$10.00 on each in-state affiliates in this report for the Grand Chapter Endowment Fund
- \$5.00 on each member initiated and affiliated in this report for the International Eastern Star Headquarters, Washington, D.C.
- \$5.00 Home Assessment on each member, less those members who paid for a Life Sponsorship PRIOR to June 30, 20\_\_\_\_
- \$1.00 General Grand Chapter Assessment on all members in good standing\*

## Payment is delinquent if not received by September 01, 20\_\_\_\_

IN TESTIMONY of the foregoing report being correct in all parts, we have herunto set our hands and seal of our Chapter this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Worthy Matron

\_\_\_\_\_  
Worthy Patron

\_\_\_\_\_  
Secretary

SEAL

In the absence of either the Worthy Matron, Worthy Patron, or Secretary, the report should be signed by the person preparing the report.

Annual Report  
(front/outside)

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

**NAMES OF OFFICERS  
AS OF June 30, 20\_\_**

Correct Names of Installed Officers on the line above the title

Membership Number	
	Worthy Matron
	Worthy Patron
	Associate Matron
	Associate Patron
	Secretary
	Treasurer
	Conduress
	Associate Conduress
	Chaplain
	Marshal
	Organist
	Adah
	Ruth
	Esther
	Martha
	Eileen
	Wander
	Sentinel

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

**SUMMARY OF MEMBERSHIP**

Total number of members in good standing\*, as of June 30, 20\_\_

- \_\_\_\_\_ fifty-year members made life members (F) (Secs. 98(a) & 193)
- \_\_\_\_\_ members who are residents of Eastern Star, Masonic or other entirely charitable homes (H) (Sec. 98(b))
- \_\_\_\_\_ members exempted from paying dues due to a medical condition (M) (Secs. 98(c)&(d))
- \_\_\_\_\_ members whose dues were remitted\*\* (R) (Secs. 98(c), 248)

\*\*Only include dues that were remitted for inability to pay or due to service in the armed forces as provided in Sec. 248. Do not include dues that were remitted for services rendered.

Exemptions that are not properly noted on the roster, which must be returned to the Grand Chapter office prior to or with this report, will not be counted, and per capita will be charged for those members.

Number of members on whom Grand Chapter dues and assessments are payable \_\_\_\_\_

**HOME ASSESSMENT**

**Life Sponsors**

Life Sponsors who are also exempt (F, H, M, R) (Secs. 98, 193, 245, \_\_\_\_\_)

Life Sponsors who are not exempt \_\_\_\_\_

**Members who owe Home Assessment**

Initiation Affiliation Reinstatement	REJECTED PETITIONS NAMES IN FULL	Date of Ballot	
		Month	Day Year
1.		_____	_____
2.		_____	_____
3.		_____	_____
4.		_____	_____
5.		_____	_____

Annual Report  
(back/inside)

ANNUAL RETURNS

GRAND CHAPTER OF CALIFORNIA  
ORDER OF THE EASTERN STAR

Return one copy to  
Grand Chapter office

Covering period 07/01/20\_\_ through 06/30/20\_\_ for \_\_\_\_\_ Chapter No. \_\_\_\_\_

GAINS		Membership	
Initiated	#	07/01/20__	#
Affiliated	#	Gains	#
Inside Jurisdiction	#	Losses	-
Outside Jurisdiction	#	06/30/20__	#
Reinstated	#	<b>MEMBERS IN GOOD STANDING - # *</b>	
Deceased in Error	#	# Fifty-Year Life Members (F) (Sec. 193)	
Total Gain	#	# Residents of Charitable Homes (H) (Sec. 245)	
<b>LOSSES</b>		# Members with medical exemptions (dementia / insanity) (M) (Sec. 98 & 245)	
Demitted	#	# Members with dues remitted (R) (Sec. 98 & 248)	
Resigned	#	# Total Exempt Members	
Suspended	#	# Non-exempt members on whom Dues and Assessments are owed **	
Nonpayment of Dues	#	# Life Sponsors	
Other causes	#	# Life Sponsors who are also exempt	
Deceased	#	# Life Sponsors who are not exempt	
Presumed Deceased	#	# Members on whom Home Assessments are owing ***	
Lost by Consolidation	#		
Total Loss	#		
# Affiliates		# Affiliates	
# Affiliates who are residents of Masonic Homes (Sec. 198)		# Affiliates who were previously members of the chapter	
# Affiliates for whom Fees are owed to Grand Chapter ****		# Affiliates for whom Fees are owed to General Grand Chapter *****	

PER CAPITA **		On Members	Totals
\$4.00	Dues to Grand Chapter	#	\$#,###.##
\$1.00	Home Maintenance Fund	#	\$#,###.##
\$0.45	Benevolent Fund	#	\$#,###.##
\$0.25	Convention Fund	#	\$#,###.##
\$0.10	Scholarship Fund	#	\$#,###.##
\$5.75	Insurance Fund	#	\$#,###.##
<b>FEES</b>			
\$0.50	Initiates & Affiliates *****	#	\$#,###.##
\$15.00	Initiates & outside Jurisdiction Affiliates - Home Endowment	#	\$#,###.##
\$10.00	Inside Jurisdiction Affiliates - Home Endowment	#	\$#,###.##
\$5.00	Initiates & Affiliates (one time per chapter) - GGC Int'l HQ *****	#	\$#,###.##
<b>ASSESSMENTS</b>			
\$5.00	Home Assessments ***	#	\$#,###.##
\$1.00	General Grand Chapter on all Members *	#	\$#,###.##

**TOTAL PAYMENT DUE GRAND CHAPTER, PAY THIS AMOUNT: \$#,###.##**  
**PAYMENT DUE BY 9/01/20\_\_**

\_\_\_\_\_  
Worthy Matron

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
Worthy Patron

In the absence of the Worthy Matron, Worthy Patron, or Secretary, the report should be signed by the person preparing it.

(Seal)

Per Capita Bill



LOSSES (Cont'd)

Expelled

Member No. \_\_\_\_\_  
Name \_\_\_\_\_  
Date of Trial \_\_\_\_\_  
Stated Meeting date at which member was expelled \_\_\_\_\_

Resigned from the Order

Member No. \_\_\_\_\_  
Name \_\_\_\_\_  
Date of Resignation \_\_\_\_\_

LIFE SPONSORSHIPS mailed to Grand Chapter

Member No. \_\_\_\_\_  
Name \_\_\_\_\_

Member No. \_\_\_\_\_  
Name \_\_\_\_\_

Member No. \_\_\_\_\_  
Name \_\_\_\_\_

Member No. \_\_\_\_\_  
Name \_\_\_\_\_

NAME CHANGES

Member No. \_\_\_\_\_  
New Name \_\_\_\_\_  
Former Name \_\_\_\_\_

Date \_\_\_\_\_ Secretary \_\_\_\_\_

(Seal)

Monthly Report of

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

Month of \_\_\_\_\_

INSTRUCTIONS FOR COMPLETING THIS FORM

1. Type or print clearly.
2. This report covers ONLY the period indicated above.
3. Prepare this report even if there was not activity.
4. Be sure all names are complete.
5. Mail this report before the 15th of the following month to:

**Grand Chapter of California**  
10960 Bostancurry Road, Suite E  
Yorba Linda, CA 92886-1711

SUMMARY OF MEMBERSHIP

Number of members as of previous month's report \_\_\_\_\_

Gained: \_\_\_\_\_  
By Initiation \_\_\_\_\_  
By Affiliation \_\_\_\_\_  
By Reinstatement \_\_\_\_\_

Lost: \_\_\_\_\_  
By Demit \_\_\_\_\_  
By Death \_\_\_\_\_  
By Resignation \_\_\_\_\_  
By Suspension \_\_\_\_\_  
By Suspension (Non-payment of Dues) \_\_\_\_\_  
By Suspension (Other Causes) \_\_\_\_\_  
By Expulsion \_\_\_\_\_

Total number of members at end of this period \_\_\_\_\_

Monthly Report  
(outside)

**GAINS**

**Chapter No.** \_\_\_\_\_

**Initiated**

Mo/Day/Yr	Name ( Mr./Mrs./Miss, Last, First, Middle) & Complete Address	Date of Birth	Occupation Telephone No.
_____	_____	_____	( ) _____
_____	_____	_____	( ) _____
_____	_____	_____	( ) _____

**Affiliated (If Dual or Plural member, so note instead of Demit Date)**

Member No. _____	Member No. _____
Name _____	Name _____
Complete Address _____	Complete Address _____
Date Affiliated _____	Date Affiliated _____
From Chapter _____	From Chapter _____
(Name, No., & State) — Was previously a member of your chapter <input type="checkbox"/>	(Name, No., & State) — Was previously a member of your chapter <input type="checkbox"/>
Date of Demit _____	Date of Demit _____
Date of Birth _____	Date of Birth _____
Occupation _____	Occupation _____

**Reinstated**

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

Name \_\_\_\_\_

Address \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_

Reinstated \_\_\_\_\_ Suspended \_\_\_\_\_

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

Occupation \_\_\_\_\_

**Restored to Order, but not to Chapter**

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

Name \_\_\_\_\_

Address \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_

Restored \_\_\_\_\_ Suspended \_\_\_\_\_

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

Occupation \_\_\_\_\_

**LOSSES**

**Demitted**

Member No. \_\_\_\_\_ Date of Demit \_\_\_\_\_

Name \_\_\_\_\_

Member No. \_\_\_\_\_ Date of Demit \_\_\_\_\_

Name \_\_\_\_\_

**Deceased**

Member No. \_\_\_\_\_ Date of Death \_\_\_\_\_

Name \_\_\_\_\_

Member No. \_\_\_\_\_ Date of Death \_\_\_\_\_

Name \_\_\_\_\_

**Suspended** (Non-payment of Dues)

Member No. \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

**Suspended** (Other causes)

Member No. \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_ Cause \_\_\_\_\_

Monthly Report  
(inside)

**The Elected Officers of \_\_\_\_\_ Chapter No. \_\_\_\_\_**

The Roster is compiled from the information you provide. Please use MAILING ADDRESS. If there are changes in the elective or appointive Officers during the year, Secretaries will please notify the Grand Secretary IMMEDIATELY. Please complete both sides of this form.

Office	Membership Number	Name (including Mr., Mrs., Mr.) email	Street City, State, Zip Code	Preferred Phone Alt. Phone	Type* Type*
Worthy Matron					
Worthy Patron					
Associate Matron					
Associate Patron					
Secretary			Physical address for shipping:		
Treasurer					
Conductress					
Associate Conductress					

\* Phone Types - H: Home; B: Business/Work; C: Cell; F: Fax

To the Grand Secretary of the Grand Chapter of California O.E.S.:

The above officers were elected for the year 20\_\_\_\_ at the Stated Meeting held on \_\_\_\_\_

Secretary

(Seal)

**NO LATER THAN NOVEMBER 1. FILL OUT AND RETURN TO:  
OFFICE OF GRAND SECRETARY, 16260 Bastanchury Road, Suite E, Yorba Linda, CA 92886-1711  
PLEASE COMPLETE REVERSE SIDE**

200709127n hwdchng 20070912

**Annual Officer Report  
Roster Information  
(front)**



The Appointive Officers of \_\_\_\_\_ Chapter No. \_\_\_\_\_

Office	Membership Number	Name (Including Mr., Mrs., Ms.) email	Street City, State, Zip Code	Preferred Phone Alt. Phone	Type*
Chaplain					
Marshal					
Organist					
Adah					
Ruth					
Esther					
Martha					
Electa					
Warder					
Sentinel					

\* Phone Types - H: Home; B: Business/Work; C: Cell; F: Fax

Annual Officer Report  
Roster Information  
(back)

by

**The Elected Officers of**

\_\_\_\_\_ Consolidated Chapter No. \_\_\_\_\_

The Roster is compiled from the information furnished. Please use MAILING ADDRESS. If there are changes in the elective or appointive Officers during the year, Secretaries will please notify the Grand Secretary IMMEDIATELY. Please complete both sides of this form.

Office	Membership Number	Name (including Mr., Mrs., Ms.) email	Street City, State, Zip Code	Preferred Phone Alt. Phone	Type* Type*
Worthy Matron					
Worthy Patron					
Associate Matron					
Associate Patron					
Secretary			Physical address for shipping:		
Treasurer					
Conductress					
Associate Conductress					

\* Phone Types - H: Home; B: Business/Work; C: Cell; F: Fax

To the Grand Secretary of the Grand Chapter of California O.E.S.:

The above officers were elected for the year 20\_\_\_\_ at the Stated Meeting held on \_\_\_\_\_

Secretary

(Seal)

As soon as possible after Consolidation, FILL OUT AND RETURN TO:  
OFFICE OF GRAND SECRETARY, 16260 Bastanchury Road, Suite E, Yorba Linda, CA 92886-1711  
PLEASE COMPLETE REVERSE SIDE

20070912/FM hwdchapg 20070912

Consolidated Officer Report  
(front)

The Appointive Officers of \_\_\_\_\_ Consolidated Chapter No. \_\_\_\_\_

Office	Membership Number	Name (Including Mr., Mrs., Ms.) email	Street City, State, Zip Code	Preferred Phone		Type*	
				Alt. Phone	Phone	Alt. Phone	Type*
Chaplain							
Marshal							
Organist							
Adah							
Ruth							
Esther							
Martha							
Electa							
Warder							
Sentinel							

\* Phone Types - H: Home; B: Business/Work; C: Cell; F: Fax

20070912.fm laschwang.20070912

Consolidated Officer Report  
(back)



CHAPTER \_\_\_\_\_ No. \_\_\_\_\_ Date \_\_\_\_\_

SECRETARY \_\_\_\_\_

**OFFICER ADDITION/CHANGE FORM**  
(Please Type or Print Neatly)

**ADDITIONS**

Member No.	Member Name (Including Mrs., Ms., Miss, Mr.)	Address (Including phone)	Office	Date Installed

**DELETIONS**

Member No.	Member Name (Including Mrs., Ms., Miss, Mr.)	Address (Including phone)	Office	Date Resigned

Officer Change

# Applications

**APPLICATION FOR ASSISTANCE FROM THE BENEVOLENT FUND  
OF THE GRAND CHAPTER OF CALIFORNIA, ORDER OF THE EASTERN STAR**

To \_\_\_\_\_ Chairman, Benevolent Fund Committee, Area No \_\_\_\_\_

Dated at \_\_\_\_\_, on \_\_\_\_\_, 20\_\_\_\_

Applicant: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Member # \_\_\_\_\_  
(please print)

Address: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_  
(please print)

A Member of \_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_

How long a member of this Chapter? \_\_\_\_\_ Of the Order? \_\_\_\_\_ Plural Member? \_\_\_\_\_

If so, name of second Chapter: \_\_\_\_\_ Chapter No. \_\_\_\_\_ of \_\_\_\_\_

Masonic Relationship: \_\_\_\_\_ who is a member of \_\_\_\_\_ Lodge No. \_\_\_\_\_

F.&A.M. of \_\_\_\_\_ Name of Master Mason: \_\_\_\_\_

Reason for application to Fund: \_\_\_\_\_

Has assistance been given you by your Chapter? \_\_\_\_\_ By the Blue Lodge? \_\_\_\_\_ By any other organizations? \_\_\_\_\_

If so, please explain when assistance received, from whom and the amount with which you have been assisted: \_\_\_\_\_

Please list all current means of income and the source of each: \_\_\_\_\_

Potential additional income or assistance and its source: \_\_\_\_\_

Do you have a savings account? \_\_\_\_\_ Balance in savings account: \$ \_\_\_\_\_

Do you have a checking account? \_\_\_\_\_ Balance in checking account: \$ \_\_\_\_\_

Do you own any property either jointly or severally? \_\_\_\_\_ (Include Real Estate, Stocks, Bonds, Safety Deposit Boxes.)

Please list property, nature and its current value: \_\_\_\_\_

<b>To be used by the Benevolent Fund</b>	
Amount of assistance recommended: \$ _____ (Monthly)	\$ _____ (Lump Sum)
Approved: _____ Area Chairman of Area _____	(Print Name)
Approved: _____ General Chairman, Benevolent _____	(Print Name)

2006 - jrh - last updated 2007/03/23

Benevolent Fund Application  
(front)

Sec. 404. **EXTENT OF RELIEF.** Relief shall not exceed the total sum of one thousand dollars (\$1,000.00) to any one beneficiary, except when necessary aid is not or cannot be obtained otherwise; payable at one time or in such sums periodically as in the discretion of the Benevolent Fund Committee shall be deemed advisable.

Further provided, that the maximum of aid to any one beneficiary shall not exceed the total sum of five thousand dollars (\$5,000.00), except in extreme emergencies, where additional aid may be extended in an amount of three thousand five hundred dollars (\$3,500.00) upon approval of the Chairman. Any member who has received the maximum amount to which he/she is eligible from J. Clifford Lee Memorial Cancer Fund and Marguerite Rennie Memorial Fund, and who has been a member of this jurisdiction for a period of five years, may receive an additional three thousand five hundred dollars (\$3,500.00) from the Benevolent Fund.

(2007)

Benevolent Fund  
(back)

## APPLICATION FOR CANCER ASSISTANCE

Date of Application \_\_\_\_\_

Date of Diagnosis \_\_\_\_\_

Date of Update \_\_\_\_\_

1. Name of Patient requiring aid \_\_\_\_\_ Age \_\_\_\_\_
2. Is Patient requiring aid a member of the Order of the Eastern Star? \_\_\_\_\_
3. Address \_\_\_\_\_  
(street) (city) (zip code)  
Telephone (\_\_\_\_) \_\_\_\_\_ Birth date \_\_\_\_\_
4. Name of Applicant Member \_\_\_\_\_  
Relationship to Patient \_\_\_\_\_
  - a. Member of \_\_\_\_\_ Chapter No. \_\_\_\_\_ Located at \_\_\_\_\_
  - b. Member Number \_\_\_\_\_
  - c. Length of Membership in this Chapter \_\_\_\_\_ Length of Membership in California \_\_\_\_\_
  - d. Is this the first application for assistance? \_\_\_\_\_
5. If a Brother, Member of \_\_\_\_\_ Lodge No. \_\_\_\_\_ F. & A.M.  
Location \_\_\_\_\_  
Has the Masonic Lodge been notified of the request for aid? \_\_\_\_\_
6. Medical Insurance Carrier \_\_\_\_\_  
Policy Number \_\_\_\_\_ Group Number \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone (\_\_\_\_) \_\_\_\_\_  
Medicare/Social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
7. Applicant may be contacted on \_\_\_\_\_ at \_\_\_\_\_  
(date) (time and place)

**This application shall be accompanied by a separate medical report by a licensed Doctor of Medicine indicating the diagnosis and the date of diagnosis. All subject matter herein contained shall be considered confidential. I hereby give my permission for the Order of the Eastern Star to contact my medical care providers for information regarding my diagnosis, treatment, and account status.**

Signature of Applicant: \_\_\_\_\_

<b>To be used by the Committees</b>	
Date Received: _____	
Approved: _____ Area Chairman	
Approved: _____ Date: _____ Cancer Assistance Chairman	
Amount Approved: \$ _____ Fund: _____ Date Applicant Notified: _____	

2007/07/10.jh last change 2009/03/18

Cancer Assistance Application  
(front)



Sec. 89A. J. CLIFFORD LEE MEMORIAL CANCER FUND. Aid from this fund shall be given to members in good standing of the Order in California Chapters, and/or members of their immediate families who are also members of their household or dependent upon them for support, who are cancer patients and in need of financial assistance. For purposes of this section, immediate families includes spouses and minor children. It may also include parents and/or grandparents if they live with the member and are financially dependent on the member for support. The definition of immediate family does not include siblings or cousins.

(a) The maximum amount of aid in any case for a member shall be fifteen thousand dollars (\$15,000.00), other than in a terminal case and in such cases where the Committee determines that an emergency exists, the maximum may be increased not to exceed an additional one thousand dollars (\$1,000.00). A grant of seven thousand five hundred dollars (\$7,500.00) shall be made for a non-member, and then only when the dependency of the applicant upon the member of the Order is established by the investigation, except in the matter of a minor child, the maximum can be applied for and granted as for a member of the Order. When the maximum amount of aid has been rendered, the Committee shall return the file to the Chairman of Cancer Assistance with written notification that the aid has been exhausted.

(b) Benefit. Payment will be allowed only for those bills approved by the Committee.

(c) Expenses. All awards and expenses of the Committee shall be charged to the J. Clifford Lee Memorial Cancer Fund.

(d) Vacancy on the Committee. A vacancy on the Committee shall be filled by the Worthy Grand Matron for the unexpired term.

(e) Funds. All contributions to the J. Clifford Lee Memorial Cancer Fund shall be used and expended as herein provided, any provisions of Section 50 of the Constitution and Laws of the Grand Chapter to the contrary notwithstanding.

(f) Assistance from the Fund will not be granted after the death of the proposed recipient of aid unless the application for aid has been made prior to his or her decease, as provided in Subsection (a).

(g) An applicant for aid from the Fund will be reimbursed for bills incurred from the date of diagnosis or the date of initiation into the Order or the date of affiliation with a chapter in California, whichever is later. All bills submitted must be related to the treatment or diagnosis of cancer.

(h) All questions must be answered truthfully, otherwise the grant will be disallowed. In the matter of an extreme emergency, the Committee (or the Worthy Grand Matron) shall have the power to act as is deemed imminent. Follow-up of case history shall be required the same as for any other application for relief.

(i) In the event of the death of a member receiving aid from the Cancer Fund and where financial assistance for burial is required, the Chapter of which the deceased was a member shall make application for such emergency burial relief to the Chairman of the Benevolent Fund Committee.

Sec. 89B. MARGUERITE RENNIE MEMORIAL FUND. Aid from this fund shall be given to members in good standing of the Order in California Chapters, and/or members of their immediate families who are also members of their household or dependent upon them for support, who are cancer patients and in need of financial aid pursuant to the following conditions.

(a) Benefit. Payment will be allowed only for those bills approved by the Committee.

(b) The maximum amount of aid in any case for a member shall be fifteen thousand dollars (\$15,000.00) except in a terminal case in which event, if the Committee determines that an emergency exists, there may be additional aid of one thousand dollars (\$1,000.00). Aid in the amount of seven thousand five hundred dollars (\$7,500.00) may be given for a non-member, who is dependent upon the applicant-member of the Order as established by the Committee; except that if the dependent is a minor child of the applicant-member, such aid may be increased to fifteen thousand dollars (\$15,000.00). When the maximum amount of aid has been rendered, the Committee shall return the file to the Chairman of Cancer Assistance with written notification that the aid has been exhausted.

(c) Expenses. All awards and expenses of the committee shall be charged to the Marguerite Rennie Memorial Fund.

(d) Vacancy on the Committee. A vacancy on the committee shall be filled by the Worthy Grand Matron for the unexpired term.

(e) Funds. All contributions to the Marguerite Rennie Memorial Fund shall be used and expended as herein provided, any provisions of Section 50 of the Constitution and Laws of the Grand Chapter to the contrary notwithstanding. Only interest income from the fund may be drawn upon for grants and expenses.

(f) An applicant for aid from this fund must be a member in good standing of a California Chapter when filing the application.

(g) An applicant for aid from this fund must not currently be a recipient of assistance from the J. Clifford Lee Memorial Cancer Fund and must not have an application for assistance from the J. Clifford Lee Memorial Cancer Fund pending at the time of making application to the Marguerite Rennie Memorial Fund.

(h) If, prior to making application to the Marguerite Rennie Memorial Fund, the applicant was a recipient of aid from the J. Clifford Lee Memorial Cancer Fund, assistance will not be granted unless the maximum aid available from the J. Clifford Lee Memorial Cancer Fund has first been received by the member.

(i) Assistance from the fund will be terminated if, while assistance is being received from the Marguerite Rennie Memorial Fund, the applicant makes application to and is granted assistance from the J. Clifford Lee Memorial Cancer Fund.

(j) Assistance from the fund will not be granted after the death of the proposed recipient of aid unless the application for aid has been made prior to his or her decease, as provided in subsection (a).

(k) An applicant for aid from the fund will be reimbursed for bills incurred from the date of diagnosis or the date of initiation into the Order or the date of affiliation with a chapter in California, whichever is later. All bills submitted must be related to the treatment or diagnosis of cancer. (l) All questions must be answered truthfully, otherwise the grant will be disallowed.

(m) In the matter of an extreme emergency, the Committee (or the Worthy Grand Matron) shall have the power to act as is deemed imminent. Follow-up of case history shall be required the same as for any other application for relief.

(n) In the event of the death of a member receiving aid from the Cancer Fund and where financial assistance for burial is required, the Chapter of which the deceased was a member shall make application for such emergency burial relief to the Chairman of the Benevolent Fund Committee.

Sec. 89C. CANCER ASSISTANCE COMMITTEE.

(a) Applications. All applications for assistance shall be made upon forms provided by Grand Chapter through the Worthy Matron or, in her absence, the Secretary of the Chapter in which membership is held. The name of the member receiving assistance shall not be announced.

(b) Investigation. Completed application forms shall be sent to the appropriate area committee member for investigation if the applicant resides in California. Applications for members residing outside of California shall be sent to the chairman of the committee who will refer the application for investigation. After investigation, the application, diagnosis from the medical doctor, and the investigation report with recommendation shall be forwarded to the chairman of the committee. The chairman shall notify the applicant as to whether the applicant has been approved for assistance.

(c) Referral of Bills. If the applicant has been approved, the chairman shall inform the applicant as to whether the J. Clifford Lee Memorial Cancer Fund or the Marguerite Rennie Memorial Fund has been selected to provide the applicant with assistance. The chairman of the Cancer Assistance Committee shall forward the applicant's documents to the chairman of the selected fund. The applicant shall be advised to forward his or her bills to the chairman of the selected fund for review. Payment will be allowed only for those bills approved by the chairman of the selected fund.

(d) Expenses. Expenses of the committee shall be charged to either the J. Clifford Lee Memorial Cancer Fund or the Marguerite Rennie Memorial Fund whichever is providing the assistance.

(e) Members of the Committee. In making appointments to this committee due consideration shall be given to the residential area of the appointee, accepting for this purpose, as far as possible, the districts as established for the Benevolent Fund Committee.

(f) Vacancies on the Committee. Vacancies on the committee shall be filled by the Worthy Grand Matron for the unexpired term.

(g) An applicant for assistance must be a member in good standing of a California chapter when filing the application for assistance.

(h) Assistance from the Funds will not be granted after the death of the proposed recipient of aid unless the application for aid has been made prior to his or her decease, as provided in subsection (a).

(i) An applicant for assistance will be reimbursed for bills incurred from the date of diagnosis or the date of initiation into the Order or the date of affiliation with a chapter in California, whichever is later. All bills submitted must be related to the treatment or diagnosis of cancer.

(j) In the matter of an extreme emergency, the committee of either the J. Clifford Lee Memorial Cancer Fund or the Marguerite Rennie Memorial Fund, or the Worthy Grand Matron shall have the power to act as is deemed imminent. Follow-up of case history shall be required the same as for any other application for assistance.

(k) In the event of the death of a member receiving assistance from either cancer fund and where financial assistance for burial is required, the Chapter of which the deceased was a member shall make application for such emergency burial relief to the chairman of the Benevolent Fund Committee.

(l) Exhaustion of Funds and Transfer of Application. When the Chairman of Cancer Assistance receives notification from the Committee of the J. Clifford Lee Memorial Cancer Fund or the Marguerite Rennie Memorial Fund that a member has exhausted the funds available from that fund, the Chairman shall contact the member and perform such investigation as may be necessary to determine if assistance is desired from the other fund and if the member qualifies for such assistance. The application of an eligible member who desires further assistance shall be forwarded to the chairman of the other fund along with any pertinent information obtained by the Chairman of Cancer Assistance during the investigation. The date of application for the second fund shall be considered to be the date on which the application is forwarded to the second fund.

(2008)

## Cancer Assistance Application (back)

## Notes

## Appendix A

### SAMPLE MINUTES

January 5, 2005

A stated meeting of Star Chapter No. 1 was held in Star Masonic Temple, 25 First Street, San Francisco, on Friday, January 5, 2005. The meeting was called to order in regular form at 8:00 p.m. by Worthy Matron, Jane Doe, assisted by Worthy Patron, John Doe.

**ESCORT:** Past Grand Matron, Mary Smith; Deputy Grand Matron, Elsie Black; 6 Worthy Matrons and 5 Worthy Patrons: 12 Past Matrons and 7 Past Patrons of Star Chapter, were escorted to the East and presented. The Associate Patron was asked to present the first time visitors.

**ROLL CALL:** All Officers were present with the exception of the Marshal and Adah, whose stations were filled by Sue Brown and Gladys Smith, respectively.

**MINUTES:** The minutes of the meeting of December 15, 2004 were approved as read. (If corrections had been made: "The minutes of the meeting of December 15, 2004 were approved as corrected. The correction being . . .")

**PETITIONS FOR MEMBERSHIP:** A petition for initiation was received from Joan Smith, wife of John Smith, a member of Blue Lodge No. 2, F&AM of San Francisco. She resides at 1001 Hill Street, San Francisco and is recommended by John Brown and Mary Brown. The fee accompanied the petition.

**REPORTS OF INVESTIGATION COMMITTEES AND BALLOTING UPON PETITIONS FOR MEMBERSHIP:** The Committees of Investigation, having reported favorably, on the petitions of Lucille Brooks to receive the degrees and on James Black to become a member by affiliation, were dismissed and the applicants balloted upon. The ballot being clear, the Worthy Matron declared the petitioners elected.

**CONFERRING OF DEGREES:** The Ceremony of Initiation was conferred on Lois and John Cooper and Ann Jones, with Sue Smith acting as the Courtesy Candidate. The new members signed the Chapter's Bylaw Book.

**COMMUNICATIONS:** Letter received from the Worthy Grand Matron regarding Public Schools Month; Invitations to Receptions honoring the Grand Ruth on February 12 and the Grand Esther on March 16<sup>th</sup>; Notice of social events and bulletins received from various Chapters, all were read. (It is not necessary to elaborate on each event.) A request for a Demit was read from Helen Brown.

**UNFINISHED BUSINESS:** The Secretary read the following resolution, which had been presented at the meeting of December 15, 2004. "Resolved that Article V, Section 1 of the bylaws of this Chapter be amended to read, "The dues of each member shall be \$20.00, payable annually on January 1st, in advance." Motion by John Gray, was seconded, the proposed amendment was carried by a 2/3 vote of the members present and voting.

**NEW BUSINESS:** A demit was granted to Helen Brown with regrets. (On any motion, give the name of the maker of the motion. It is not necessary to state the name of the second. Do not include any discussion.)

**REPORT OF STANDING COMMITTEE:** The Budget for the fiscal year was read by the Chairman of the Budget Committee, Jack White. The anticipated income and the estimated expenditures listed as \$1,235.00. Brother Jack, for the Budget Committee, moved that the budget be adopted. The budget was adopted. A copy of the report is attached to these minutes.

**REPORT OF SPECIAL COMMITTEES:** Joan Smith, Chairman of the Committee to purchase new paraphernalia, reported the Committee was obtaining prices and asked for additional time to complete her report. Permission granted.

**CIRCLE OF CONCERN:** The members stood in memory of William Hall, who passed away December 21, 2004. Chairman of the Circle of Concern, Trudy White, gave her report.

**RECEIPTS:** The following paid \$10.00 dues and \$5.00 Home Assessments; Mary Brown, Jean and Jack Black, Sam and Sara Kline, Tom Smith. Dues and Home Assessments total \$90.00 (OR Total Dues and Assessments \$90.00). Donations to the Home Endowment Fund from Sue Smith in memory of William Hall and from Ken King total \$25.00. Purchase of a Ritual by Lois Lane \$30.00. Total receipts at the meeting \$145.00. Interest received in the amount of \$ 1.92 on the savings account. Total receipts of \$ 146.92.

**BILLS:** The following properly audited bills were ordered paid:

Masonic Temple, rent for December	100.00
Salaries for January 2005:	
Helen Smith, Secretary	50.00
Lou Green, Sentinel	7.50
Mildred White, Organist	25.00
Brown's Bakery	
Refreshments 1-5-05	26.00
Lucky's Market, Coffee	<u>7.49</u>
Total disbursements	\$215.99

**GOOD OF THE ORDER:** The Worthy Patron was invited to preside and complimented the Officers and welcomed our new members. He called on our Past Grand Matron, Mary Smith, who responded graciously, as did Deputy Grand Matron, Elsie Black.

When assuming her authority, the Worthy Matron called attention to the Official Visit of the Worthy Grand Matron on March 2nd and urged all to attend. She thanked Sue Smith for acting as the Courtesy Candidate and for being Chairman of the evening.

**CLOSING:** There being no further business, the Chapter was closed in form, the Farewell being given by Past Grand Matron, Mary Smith.

(Signed)  
Worthy Matron

(Signed)  
Secretary

After the meeting a short program prepared by the Officers was enjoyed and refreshments of apple pie and cheese were served by the Job's Daughters of Bethel No. 6.

## Notes

## **Appendix B**

### **TAX INFORMATION**

#### **ALL CHAPTERS:**

##### **Chapter Annual Financial Report Form:**

- All chapters **MUST** complete this form unless they file a Federal Form 990.
- Annually mailed from the Grand Chapter office to each Chapter in August.
- Financial information covering the period October 1st through September 30<sup>th</sup>.
- Must be returned to Grand Chapter after September 30th but by November 15<sup>th</sup> of each year.

##### **Federal Form 990: Return of Organization Exempt from Income Tax**

- All chapters are required to file Form 990 annually, unless included in Grand Chapter's filing of the Form 990.
- Chapters who are currently filing this form will continue to do so.
- If your Chapter files a Federal form 990, they will not be required to complete the Chapter Annual Financial Report above.
- The Grand Chapter office **MUST** be sent a copy of the 990 filed by individual chapters.

#### **SALES TAX:**

A Chapter is subject to California Sales Tax if it has retail sales outside of the Masonic Temple and to people other than our own members. A temporary Sales Tax permit should be obtained from the State Board of Equalization.

For application call 1-800-400-7115

For application on line <http://www.boe.ca.gov/info/reg.htm#sales>  
BOE400SPA

#### **PUBLICATIONS:**

Circular E, Employer's Tax Guide from the Internal Revenue Service.  
DE 44, Employer's Tax Guide from the Employment Development Department.

## **PAYROLL TAX INFORMATION:**

### **Numbers:**

- Federal: Employer Identification Number (EIN, FIN, TIN)  
Obtain number on IRS form SS-4
- State: Employment Development Department (EDD)  
Obtain number on State form DE 1 NP

### **Employer:**

If a Chapter pays any salary, the Chapter is an Employer.

### **Employee:**

An employee is a person who is given direction for the work that is performed. Good examples are the Secretaries and the Treasurers. Not only are you directing them, but you also have the right to control the work that is being done.

An Independent Contractor is someone who does the work and you only control the results. It is a person that could perform work at several places. An example of this could be an organist.

*The following information pertains to Chapters who pay NO salaries.*

### **Letter:**

If a Chapter pays no salaries, a letter signed and sealed by the Secretary MUST be sent to the Grand Chapter office each year stating that no salaries were paid during the period of July 1, (preceding year) through June 30, (current year).

## **If the Chapter pays no salaries, you may disregard the remainder of this Appendix.**

*The following information pertains to Chapters who ARE paying salaries.*

Chapters that pay combined salaries that total over \$100 per quarter file the following State forms:

- DE 6 filed quarterly
- DE 7 filed annually
- DE 88 filed quarterly
- DE 34 when new employees



Chapters that pay salaries file the following Federal forms:

- 940-EZ file annually
- 941 filed quarterly
- 941 V filed quarterly
- if instructed by the IRS, a chapter may file a 944 annually instead of the 941 & 941 V filed quarterly

Chapters that file Federal Form 941 file the following:

- W-2 annually in January
- W-3 annually in February

All employees complete a W-4 annually in January

**Deadlines for filing Federal and State forms:**

1st quarter	January 1 – March 31	Postmarked by April 30
2nd quarter	April 1 – June 30	Postmarked by July 31
3rd quarter	July 1 – September 30	Postmarked by October 31
4th quarter	October 1 – December 31	Postmarked by January 31

**Form DE 34: State Report of New Employee(s)**

- Complete if filing State Taxes for the first time
- Complete as a new Secretary to notify State of new contact person
- Within 20 days of starting work, complete if hiring any new employees
- All employees may be listed on the same form
- Make a copy **for your files**
- Mail to: Employment Development Department, P. O. Box 997016, MIC 23, West Sacramento, CA 95799-7016

**Form DE 6: State Quarterly Wage and Withholding Report**

- File this report quarterly
- If a Chapter pays employees only once a year, the form must still be completed quarterly with zero total salaries until the quarter in which the salaries are paid and then complete the form with the total salaries paid that quarter.
- After your first filing, this form should be mailed to you quarterly
- Make a copy for the Grand Chapter office **and your files**
- Mail to: State of California, Employment Development Department, P. O. Box 826288, Sacramento, CA 94230-6288

**Form DE 88: State Payroll Tax Deposit**

- A book of coupons will be sent to the Chapter directly from the State
- Fill out this form for the quarter being paid and mail with your check payable to EDD to:
  - Employment Development Department
  - P. O. Box 826276, Sacramento, CA 94230-6276
- The amounts are entered for:
  - UI Unemployment Insurance on first \$7,000 of salary — paid by chapter
  - ETT Employer Training Tax on first \$7,000 of salary — paid by chapter
  - PIT Personal Income Tax — paid by employee
  - SDI State Disability Insurance — paid by employee

**Form DE 7: State Annual Reconciliation Statement**

- Totals of all DE 6s and DE 88s filed through the year
- If all State taxes have been correctly reported and paid quarterly, this form will total “zero” when filled out. Sign and mail the form.
- Mail to: State of California, Employment Development Department, P. O. Box 826286, Sacramento, CA 94230-6286

**Form 940: Employer’s Annual Federal Unemployment, FUTA**

- Form is prepared and sent to the IRS annually.
- Form is filed by Chapters that pay salaries.
- Form 940-EZ may be used if all state unemployment was paid by January 31st and if all wages taxable by FUTA are also taxable for state’s unemployment tax.
- Applies to individual salaries that amount to over \$50 per quarter.

Chapters that pay individual salaries that total over \$50 per quarter file the following Federal forms: (FUTA)

- 940-EZ filed annually
- 940-V(EZ) filed annually

**Form 940-EZ: Federal Employer’s Annual Federal Unemployment Tax Return (FUTA)**

- File this report annually
- Form is filed by Chapters that pay individual salaries that total over \$50 per quarter.

**Form 940-V(EZ):** Payment Voucher (lower part of the 940-EZ form)

- Fill out this form and mail with your check payable to United States Treasury to:

Return without payment: Ogden, Utah 84102-0047  
Return with payment: P.O. Box 660351,  
Dallas, Texas 75266-0351

**Form 941:** Federal Insurance Contribution Act, FICA

- Form is prepared and sent to the IRS quarterly.
- Form is filed by Chapters that pay salaries.
- This is a Social Security tax of which a percentage is paid by the employee and a percentage is paid by the employer.
- After the first filing, this form should be sent to you quarterly by the IRS.
- If a Chapter pays employees only once a year, the form must still be completed quarterly with zero total salaries until the quarter in which the salaries are paid and then complete the form with the total salaries paid that quarter.
- Make a copy for the Grand Chapter office **and your files**.

**Form 941-V:** Payment Voucher

- Fill out this form for the quarter being paid and mail with your check payable to the United States Treasury to:

Internal Revenue Service

Return without payment: Ogden, Utah 84201-0046  
Return with payment: P. O. Box 660264  
Dallas, Texas 75266-0264

**W-4:** Employee Withholding Allowance Certificate

- At the beginning of each year, give each employee a W-4 to complete and file with the Chapter. You retain this form.
- Usually the amount of salary received is below the starting amount for withholding income tax, so this will not be dealt with.

**Form W-2:** Wage and Tax Statement (multi-copy form)

- One form is made out for each employee for their individual income tax records
- Copies of the W-2 must be given to the employee by January 31<sup>st</sup>

**Form W-3: Transmittal of Wage and Tax Statements**

- The total wages on this form are the total of the W-2 wages
- Send Copy A of each W-2 form together with the W-3 form to:  
Social Security Administration  
Data Operations Center  
Wilkes-Barre, PA 18769-0001
- Deadline is February 28th (29th)

These forms are available on the Internet:

Federal: IRS — <http://www.irs.gov>  
State: EDD — <http://www.edd.ca.gov>

**The Grand Chapter office requires copies  
of all 941 and DE 6 forms quarterly.**

*The following information pertains to Chapters who ARE paying fees to an Independent Contractor.*

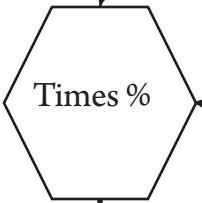
**Form 1099:**

- Complete this form on each Independent Contractor in January.
- Must be filed on any contractor whose fee was \$600 or more for the year
- Form must be given to contractor by January 31st
- You must have the contractor's Tax I.D. number

## Notes

A worksheet might assist you in preparing the various reports required when the Chapter pays salaries. The worksheet below is an example of one way that salaries

	1st Quarter			2nd Quarter		
	Jan	Feb	Mar	Apr	May	Jun
	Sec	Treas	Total	Sec	Treas	Total
Gross Salary	300.00	75.00	375.00	300.00	75.00	375.00
F.I.C.A. (6.2%)	18.60	4.65	23.25	18.60	4.65	23.25
Medicare (1.45%)	4.35	1.09	5.44	4.35	1.09	5.44
S.D.I. (.9%)	2.70	0.68	28.69	2.70	0.68	28.69
Net Wages	274.35	68.59	342.94	274.35	68.59	342.94



and deductions may be tracked. On the following pages, examples are shown moving the information from the worksheet to some of the forms.

		4th Quarter			Yearly Total		
Aug	Sep	Oct	Nov	Dec			
Treas	Total	Sec	Treas	Total	Sec	Treas	Total
75.00	375.00	300.00	75.00	375.00	1,200.00	300.00	1,500.00
4.65	23.25	18.60	4.65	23.25	74.40	18.60	93.00
1.09	5.44	4.35	1.09	5.44	17.40	4.35	21.75
0.68	28.69	2.70	0.68	28.69	10.80	2.70	114.75
68.59	342.94	274.35	68.59	342.94	1,097.40	274.35	1,371.75

*Should Match*

**EDD** Employment Development Department  
State of California

**PAYROLL TAX DEPOSIT DE 88ALL** (TYPE OR PRINT IN BLACK INK ONLY):

1. PAY DATE:  MUST BE COMPLETED

2. DEPOSIT SCHEDULE: (MARK ONE BOX ONLY)

Rate Tax

NEXT BANKING DAY  A) UI

SEMI-WEEKLY  B) ETT

MONTHLY  C) SD

QUARTERLY  D) California PIT

3. QUARTER COVERED  E) Penalty

F) Interest

G) TOTAL PAID \$

4. DEPOSIT AMOUNTS:

STATE OF CALIFORNIA  
EMPLOYMENT DEVELOPMENT DEPARTMENT  
P O BOX 826276  
SACRAMENTO, CA 94230-6276  
(Last PAY DATE covered by deposit)

Employer Name:

Employer DBA:

Indicate your Account Number here: Please enter on your check

01880698

PREPARER'S SIGNATURE: X

TELEPHONE NO. ( )

DEPARTMENT USE ONLY

PAY THIS AMOUNT  
TOTAL LINES A THROUGH F.  
DO NOT FOLD OR STAPLE.  
Make check payable to EDD.

88ALL Rev. 16 (1-04) (INTERNET)

# QUARTERLY WAGE AND WITHHOLDING REPORT

PLEASE TYPE THIS FORM PER INSTRUCTIONS ON REVERSE  
You must FILE this report even if you had no payroll. If you had no payroll, complete items C or D and P.



00060198

Page number \_\_\_\_\_ of \_\_\_\_\_

QUARTER ENDED

DUE

DELINQUENT IF NOT POSTMARKED OR RECEIVED BY

VR \_\_\_\_\_

OTR \_\_\_\_\_

EMPLOYER ACCOUNT NO. \_\_\_\_\_

**DO NOT ALTER THIS AREA**

PT  C  T  S  W  A   
Mo. EFFECTIVE DATE Day Yr. WIC \_\_\_\_\_

A. EMPLOYEES full-time and part-time who worked during or received pay subject to UI for the payroll period which includes the 12th of the month.

1st Mo. \_\_\_\_\_ 2nd Mo. \_\_\_\_\_ 3rd Mo. \_\_\_\_\_

B.  Check this box if you are reporting ONLY Voluntary Plan DI wages on this page. Report PIT Wages and PIT Withheld, if appropriate. (See instructions for item B.)

C.  NO PAYROLL

D.  OUT OF BUSINESS/FINAL REPORT

E. SOCIAL SECURITY NUMBER	F. EMPLOYEE NAME (FIRST NAME)	(M.I.) (LAST NAME)	Date _____
G. TOTAL SUBJECT WAGES	H. PIT WAGES	I. PIT WITHHELD	
E. SOCIAL SECURITY NUMBER	F. EMPLOYEE NAME (FIRST NAME)	(M.I.) (LAST NAME)	
G. TOTAL SUBJECT WAGES	H. PIT WAGES	I. PIT WITHHELD	
E. SOCIAL SECURITY NUMBER	F. EMPLOYEE NAME (FIRST NAME)	(M.I.) (LAST NAME)	
G. TOTAL SUBJECT WAGES	H. PIT WAGES	I. PIT WITHHELD	
E. SOCIAL SECURITY NUMBER	F. EMPLOYEE NAME (FIRST NAME)	(M.I.) (LAST NAME)	
G. TOTAL SUBJECT WAGES	H. PIT WAGES	I. PIT WITHHELD	
E. SOCIAL SECURITY NUMBER	F. EMPLOYEE NAME (FIRST NAME)	(M.I.) (LAST NAME)	
G. TOTAL SUBJECT WAGES	H. PIT WAGES	I. PIT WITHHELD	
E. SOCIAL SECURITY NUMBER	F. EMPLOYEE NAME (FIRST NAME)	(M.I.) (LAST NAME)	
G. TOTAL SUBJECT WAGES	H. PIT WAGES	I. PIT WITHHELD	
J. TOTAL SUBJECT WAGES THIS PAGE	K. TOTAL PIT WAGES THIS PAGE	L. TOTAL PIT WITHHELD THIS PAGE	
M. GRAND TOTAL SUBJECT WAGES	N. GRAND TOTAL PIT WAGES	O. GRAND TOTAL PIT WITHHELD	

P. I declare that the information herein is true and correct to the best of my knowledge and belief.

Preparer's Signature \_\_\_\_\_ Title \_\_\_\_\_ Phone ( ) \_\_\_\_\_ Date \_\_\_\_\_  
(Owner, Accountant, Preparer, etc.)

DE 6 Rev. 4 (2-04) (INTERNET) MAIL TO: State of California / Employment Development Department / P.O. Box 826288 / Sacramento, CA 94230-6288

	1st Quarter				2nd Quarter			
	Sec	Treas	Warder	Total	Sec	Treas	Warder	Total
Gross Salary	300.00	75.00	30.00	405.00	300.00	75.00	30.00	405.00
F.I.C.A. (6.2%)	18.60	4.65	1.86	25.11	18.60	4.65	1.86	25.11
Medicare (1.45%)	4.35	1.09	0.44	5.87	4.35	1.09	0.44	5.87
S.D.I. (.9%)	2.70	0.68	0.27	30.98	2.70	0.68	0.27	30.98
Net Wages	274.35	68.59	27.44	370.37	274.35	68.59	27.44	370.37



Form **941 for 2005: Employer's Quarterly Federal Tax Return**  
 (Rev. January 2005) Department of the Treasury — Internal Revenue Service

9901

OMB No. 1545-0029

Employer identification number   -

Name (not your trade name)

Trade name (if any)

Address

Number  Street  Suite or room number

City  State  ZIP code

**Report for this Quarter ...**  
(Check one.)

1: January, February, March

2: April, May, June

3: July, August, September

4: October, November, December

Read the separate instructions before you fill out this form. Please type or print within the boxes.

**Part 1: Answer these questions for this quarter.**

1 Number of employees who received wages, tips, or other compensation for the pay period including: Mar. 12 (Quarter 1), June 12 (Quarter 2), Sept. 12 (Quarter 3), Dec. 12 (Quarter 4) 1

2 Wages, tips, and other compensation . . . . . 2

3 Total income tax withheld from wages, tips, and other compensation . . . . . 3

4 If no wages, tips, and other compensation are subject to social security or Medicare tax . . . . .  Check and go to line 6.

5 Taxable social security and Medicare wages and tips:

Column 1 Column 2

5a Taxable social security wages  × .124 =

5b Taxable social security tips  × .124 =

5c Taxable Medicare wages & tips  × .029 =

5d Total social security and Medicare taxes (Column 2, lines 5a + 5b + 5c = line 5d) . . . . . 5d

6 Total taxes before adjustments (lines 3 + 5d = line 6) . . . . . 6

7 Tax adjustments (If your answer is a negative number, write it in brackets.):

7a Current quarter's fractions of cents . . . . .

7b Current quarter's sick pay . . . . .

7c Current quarter's adjustments for tips and group-term life insurance . . . . .

7d Current year's income tax withholding (Attach Form 941c) . . . . .

7e Prior quarters' social security and Medicare taxes (Attach Form 941c) . . . . .

7f Special additions to federal income tax (reserved use) . . . . .

7g Special additions to social security and Medicare (reserved use) . . . . .

7h Total adjustments (Combine all amounts: lines 7a through 7g.) . . . . . 7h

8 Total taxes after adjustments (Combine lines 6 and 7h.) . . . . . 8

9 Advance earned income credit (EIC) payments made to employees . . . . . 9

10 Total taxes after adjustment for advance EIC (lines 8 - 9 = line 10) . . . . . 10

11 Total deposits for this quarter, including overpayment applied from a prior quarter . . . . . 11

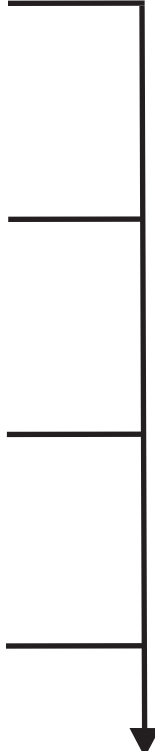
12 Balance due (lines 10 - 11 = line 12) Make checks payable to the *United States Treasury* . . . . . 12

13 Overpayment (If line 11 is more than line 10, write the difference here.)  Check one  Apply to next return.  
 Send a refund.

Next →

3rd Quarter				4th Quarter			
Sec	Treas	Warder	Total	Sec	Treas	Warder	Total
300.00	75.00	30.00	405.00	300.00	75.00	30.00	405.00
18.60	4.65	1.86	25.11	18.60	4.65	1.86	25.11
4.35	1.09	0.44	5.87	4.35	1.09	0.44	5.87
2.70	0.68	0.27	30.98	2.70	0.68	0.27	30.98
274.35	68.59	27.44	370.37	274.35	68.59	27.44	370.37

	1st Quarter		
	Jan	Feb	Mar
	Sec	Treas	Total
Gross Salary	300.00	75.00	375.00
F.I.C.A. (6.2%)	18.60	4.65	23.25
Medicare (1.45%)	4.35	1.09	5.44
S.D.I. (.9%)	2.70	0.68	28.69
Net Wages	274.35	68.59	342.94
	2nd Quarter		
	Sec	Treas	Total
Gross Salary	300.00	75.00	375.00
F.I.C.A. (6.2%)	18.60	4.65	23.25
Medicare (1.45%)	4.35	1.09	5.44
S.D.I. (.9%)	2.70	0.68	28.69
Net Wages	274.35	68.59	342.94
	3rd Quarter		
	Sec	Treas	Total
Gross Salary	300.00	75.00	375.00
F.I.C.A. (6.2%)	18.60	4.65	23.25
Medicare (1.45%)	4.35	1.09	5.44
S.D.I. (.9%)	2.70	0.68	28.69
Net Wages	274.35	68.59	342.94
	4th Quarter		
	Sec	Treas	Total
Gross Salary	300.00	75.00	375.00
F.I.C.A. (6.2%)	18.60	4.65	23.25
Medicare (1.45%)	4.35	1.09	5.44
S.D.I. (.9%)	2.70	0.68	28.69
Net Wages	274.35	68.59	342.94



	Yearly Total		
	Sec	Treas	Total
Gross Salary	1,200.00	300.00	1,500.00
F.I.C.A. (6.2%)	74.40	18.60	93.00
Medicare (1.45%)	17.40	4.35	21.75
S.D.I. (.9%)	10.80	2.70	114.75
Net Wages	1,097.40	274.35	1,371.75

a Control number <b>22222</b>		OMB No. 1545-0008											
b Employer identification number (EIN)		1 Wages, tips, other compensation			2 Federal income tax withheld								
c Employer's name, address, and ZIP code		3 Social security wages			4 Social security tax withheld								
		5 Medicare wages and tips			6 Medicare tax withheld								
		7 Social security tips			8 Allocated tips								
d Employee's social security number		9 Advance EIC payment			10 Dependent care benefits								
e Employee's first name and initial Last name		11 Nonqualified plans			12a								
Secretary, Your 1234 Main St. Anytown, CA 92000-0001		13 Statutory employees Retirement plan Third-party sick day			12b								
		14 Other			12c								
		SDI			12d								
f Employee's address and ZIP code		15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

Form **W-2 Wage and Tax Statement**  
Copy 1—For State, City, or Local Tax Department

**2005**

Department of the Treasury—Internal Revenue Service

a Control number <b>22222</b>		OMB No. 1545-0008											
b Employer identification number (EIN)		1 Wages, tips, other compensation			2 Federal income tax withheld								
c Employer's name, address, and ZIP code		3 Social security wages			4 Social security tax withheld								
		5 Medicare wages and tips			6 Medicare tax withheld								
		7 Social security tips			8 Allocated tips								
d Employee's social security number		9 Advance EIC payment			10 Dependent care benefits								
e Employee's first name and initial Last name		11 Nonqualified plans			12a								
Treasurer, Your 9876 Main St. Anytown, CA 92000-0002		13 Statutory employees Retirement plan Third-party sick day			12b								
		14 Other			12c								
		SDI			12d								
f Employee's address and ZIP code		15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

Form **W-2 Wage and Tax Statement**  
Copy 1—For State, City, or Local Tax Department

**2005**

Department of the Treasury—Internal Revenue Service

a Control number		22222		OMB No. 1545-0008			
b Employer identification number (EIN)				1 Wages, tips, other compensation		2 Federal income tax withheld	
c Employer's name, address, and ZIP code				3 Social security wages		4 Social security tax withheld	
				5 Medicare wages and tips		6 Medicare tax withheld	
				7 Social security tips		8 Allocated tips	
d Employee's social security number				9 Advance EIC payment		10 Dependent care benefits	
e Employee's first name and initial Last name				11 Nonqualified plans		12a	
				13 Statutory employee Retirement plan Third-party sick pay		12b	
				14 Other		12c	
						12d	
f Employee's address and ZIP code							
15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.	
						19 Local income tax	
						20 Locality name	

Form **W-2 Wage and Tax Statement**  
 Copy 1—For State, City, or Local Tax Department

2005

Department of the Treasury—Internal Revenue Service

a Control number		22222		OMB No. 1545-0008			
b Employer identification number (EIN)				1 Wages, tips, other compensation		2 Federal income tax withheld	
c Employer's name, address, and ZIP code				3 Social security wages		4 Social security tax withheld	
				5 Medicare wages and tips		6 Medicare tax withheld	
				7 Social security tips		8 Allocated tips	
d Employee's social security number				9 Advance EIC payment		10 Dependent care benefits	
e Employee's first name and initial Last name				11 Nonqualified plans		12a	
				13 Statutory employee Retirement plan Third-party sick pay		12b	
				14 Other		12c	
						12d	
f Employee's address and ZIP code							
15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.	
						19 Local income tax	
						20 Locality name	

Form **W-2 Wage and Tax Statement**  
 Copy 1—For State, City, or Local Tax Department

2005

Department of the Treasury—Internal Revenue Service

Check this box

DO NOT STAPLE OR FOLD

a Control number 33333		For Official Use Only OMB No. 1545-0008		
b Kind of Payer <input type="checkbox"/> 941 <input type="checkbox"/> CT-1 <input type="checkbox"/> Hehlid. emp. <input type="checkbox"/> Medicare govt. emp. <input type="checkbox"/> Third party sick pay	c Total number of Forms W-2	d Establishment number	1 Wages and other compensation	2 Federal income tax withheld
			3 Social security wages	4 Social security tax withheld
e Employer identification number (EIN)	f Employer's name	g Employer's address and ZIP code	5 Medicare wages and tips	6 Medicare tax withheld
			7 Social security tips	8 Allocated tips
h Other EIN used this year	i State	j Employer's state ID number	9 Advance EIC payments	10 Dependent care benefits
			11 Nonqualified plans	12 Deferred compensation
k Contact person	l Email address	m Telephone number ( ) Fax number ( )	13 For third-party sick pay use only	14 Income tax withheld by payer of third-party sick pay
			15 State wages, tips, etc.	16 State income tax
		17 Local wages, tips, etc.	18 Local income tax	For Official Use Only

Under penalties of perjury, I declare that I have examined this return and accompanying documents, and, to the best of my knowledge and belief, they are true, correct, and complete.

Signature ▶

Title ▶

Date ▶

Form **W-3 Transmittal of Wage and Tax Statements**

**2005**

Department of the Treasury  
Internal Revenue Service

Send this entire page with the entire Copy A page of Form(s) W-2 to the Social Security Administration.  
Photocopies are not acceptable.

## Notes

# TAX FORMS

## New Employees Tax Forms



### REPORT OF NEW EMPLOYEE(S)

*See detailed instructions on reverse side. Please type or print.  
NOTE: Report new employees within 20 days of start of work.*



00340600



DATE M M D D Y Y	CA EMPLOYER ACCOUNT NO. L	BRANCH CODE	FEDERAL ID NO. L
---------------------	------------------------------	-------------	---------------------

BUSINESS NAME	CONTACT PERSON	TELEPHONE NO.
---------------	----------------	---------------

ADDRESS	STREET	CITY	STATE	ZIP
---------	--------	------	-------	-----

EMPLOYEE FIRST NAME L	MI L	EMPLOYEE LAST NAME L
SOCIAL SECURITY NO. L	STREET NO. L	STREET NAME L
CITY L	STATE L	ZIP L
		START-OF-WORK DATE M M D D Y Y

EMPLOYEE FIRST NAME L	MI L	EMPLOYEE LAST NAME L
SOCIAL SECURITY NO. L	STREET NO. L	STREET NAME L
CITY L	STATE L	ZIP L
		START-OF-WORK DATE M M D D Y Y

EMPLOYEE FIRST NAME L	MI L	EMPLOYEE LAST NAME L
SOCIAL SECURITY NO. L	STREET NO. L	STREET NAME L
CITY L	STATE L	ZIP L
		START-OF-WORK DATE M M D D Y Y

EMPLOYEE FIRST NAME L	MI L	EMPLOYEE LAST NAME L
SOCIAL SECURITY NO. L	STREET NO. L	STREET NAME L
CITY L	STATE L	ZIP L
		START-OF-WORK DATE M M D D Y Y

EMPLOYEE FIRST NAME L	MI L	EMPLOYEE LAST NAME L
SOCIAL SECURITY NO. L	STREET NO. L	STREET NAME L
CITY L	STATE L	ZIP L
		START-OF-WORK DATE M M D D Y Y

EMPLOYEE FIRST NAME L	MI L	EMPLOYEE LAST NAME L
SOCIAL SECURITY NO. L	STREET NO. L	STREET NAME L
CITY L	STATE L	ZIP L
		START-OF-WORK DATE M M D D Y Y

# Form W-4 (2005)

**Purpose.** Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Because your tax situation may change, you may want to refigure your withholding each year.

**Exemption from withholding.** If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2005 expires February 16, 2006. See Pub. 505, Tax Withholding and Estimated Tax.

**Note.** You cannot claim exemption from withholding if (a) your income exceeds \$800 and includes more than \$250 of unearned income (for example, interest and dividends) and (b) another person can claim you as a dependent on their tax return.

**Basic instructions.** If you are not exempt, complete the **Personal Allowances Worksheet** below. The worksheets on page 2 adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-

earner/two-job situations. Complete all worksheets that apply. However, you may claim fewer (or zero) allowances.

**Head of household.** Generally, you may claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individuals. See line E below.

**Tax credits.** You can take projected tax credits into account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the **Personal Allowances Worksheet** below. See Pub. 919, How Do I Adjust My Tax Withholding? for information on converting your other credits into withholding allowances.

**Nonwage income.** If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax payments using Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax.

**Two earners/two jobs.** If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withholding usually will be most accurate when all allowances are claimed on the Form W-4 for the highest paying job and zero allowances are claimed on the others.

**Nonresident alien.** If you are a nonresident alien, see the Instructions for Form 8233 before completing this Form W-4.

**Check your withholding.** After your Form W-4 takes effect, use Pub. 919 to see how the dollar amount you are having withheld compares to your projected total tax for 2005. See Pub. 919, especially if your earnings exceed \$125,000 (Single) or \$175,000 (Married).

**Recent name change?** If your name on line 1 differs from that shown on your social security card, call 1-800-772-1213 to initiate a name change and obtain a social security card showing your correct name.

## Personal Allowances Worksheet (Keep for your records.)

**A** Enter "1" for yourself if no one else can claim you as a dependent . . . . . **A** \_\_\_\_\_

**B** Enter "1" if: } **B** \_\_\_\_\_

- You are single and have only one job; or
- You are married, have only one job, and your spouse does not work; or
- Your wages from a second job or your spouse's wages (or the total of both) are \$1,000 or less.

**C** Enter "1" for your spouse. But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.) . . . . . **C** \_\_\_\_\_

**D** Enter number of dependents (other than your spouse or yourself) you will claim on your tax return . . . . . **D** \_\_\_\_\_

**E** Enter "1" if you will file as head of household on your tax return (see conditions under Head of household above) . . . . . **E** \_\_\_\_\_

**F** Enter "1" if you have at least \$1,500 of child or dependent care expenses for which you plan to claim a credit . . . . . **F** \_\_\_\_\_

**Note.** Do not include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.

**G Child Tax Credit** (including additional child tax credit): **G** \_\_\_\_\_

- If your total income will be less than \$54,000 (\$79,000 if married), enter "2" for each eligible child.
- If your total income will be between \$54,000 and \$84,000 (\$79,000 and \$119,000 if married), enter "1" for each eligible child plus "1" additional if you have four or more eligible children.

**H** Add lines A through G and enter total here. (Note. This may be different from the number of exemptions you claim on your tax return.) **H** \_\_\_\_\_

For accuracy, complete all worksheets that apply. } **G** \_\_\_\_\_

- If you plan to itemize or claim adjustments to income and want to reduce your withholding, see the **Deductions and Adjustments Worksheet** on page 2.
- If you have more than one job or are married and you and your spouse both work and the combined earnings from all jobs exceed \$35,000 (\$25,000 if married) see the **Two-Earner/Two-Job Worksheet** on page 2 to avoid having too little tax withheld.
- If neither of the above situations applies, stop here and enter the number from line H on line 5 of Form W-4 below.

Cut here and give Form W-4 to your employer. Keep the top part for your records.

Form <b>W-4</b> Department of the Treasury Internal Revenue Service	<b>Employee's Withholding Allowance Certificate</b> ▶ Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.	OMB No. 1545-0010 <b>2005</b>
1 Type or print your first name and middle initial _____ Last name _____		2 Your social security number _____
Home address (number and street or rural route) _____		3 <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withheld at higher Single rate. Note. If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.
City or town, state, and ZIP code _____		4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a new card. <input type="checkbox"/>
5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2) _____		5 _____
6 Additional amount, if any, you want withheld from each paycheck _____		6 \$ _____
7 I claim exemption from withholding for 2005, and I certify that I meet both of the following conditions for exemption.		
• Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and		
• This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.		
If you meet both conditions, write "Exempt" here _____ ▶ 7 _____		
Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.		
Employee's signature (Form is not valid unless you sign it.) _____ ▶		
8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.) _____		9 Office code (optional) _____
10 Employer identification number (EIN) _____		

For Privacy Act and Paperwork Reduction Act Notice, see page 2.

Cat. No. 10220Q

Form **W-4** (2005)

# W-4 Federal — Employee's Withholding Allowance Certificate



# Quarterly Tax Forms



## QUARTERLY WAGE AND WITHHOLDING REPORT

PLEASE TYPE THIS FORM PER INSTRUCTIONS ON REVERSE  
 You must FILE this report even if you had no payroll. If you had no payroll, complete items C or D and P.



00060198

Page number \_\_\_\_\_ of \_\_\_\_\_

QUARTER ENDED

DUE

DELINQUENT IF NOT POSTMARKED OR RECEIVED BY

vn  qtr

EMPLOYER ACCOUNT NO. \_\_\_\_\_

**DO NOT ALTER THIS AREA**

P1  C  T  S  W  A

EFFECTIVE DATE: Mo. \_\_\_\_\_ Day \_\_\_\_\_ Yr. \_\_\_\_\_ WIC \_\_\_\_\_

A. EMPLOYEES full-time and part-time who worked during or received pay subject to UI for the payroll period which includes the 12th of the month.

1st Mo. \_\_\_\_\_ 2nd Mo. \_\_\_\_\_ 3rd Mo. \_\_\_\_\_

Check this box if you are reporting ONLY Voluntary Plan DI wages on this page. Report PIT Wages and PIT Withheld, if appropriate. (See instructions for item B.)

C.  NO PAYROLL

D.  OUT OF BUSINESS/FINAL REPORT  
 Date \_\_\_\_\_

E. SOCIAL SECURITY NUMBER \_\_\_\_\_ F. EMPLOYEE NAME (FIRST NAME) \_\_\_\_\_ (M.I.) (LAST NAME) \_\_\_\_\_

G. TOTAL SUBJECT WAGES \_\_\_\_\_ H. PIT WAGES \_\_\_\_\_ I. PIT WITHHELD \_\_\_\_\_

E. SOCIAL SECURITY NUMBER \_\_\_\_\_ F. EMPLOYEE NAME (FIRST NAME) \_\_\_\_\_ (M.I.) (LAST NAME) \_\_\_\_\_

G. TOTAL SUBJECT WAGES \_\_\_\_\_ H. PIT WAGES \_\_\_\_\_ I. PIT WITHHELD \_\_\_\_\_

E. SOCIAL SECURITY NUMBER \_\_\_\_\_ F. EMPLOYEE NAME (FIRST NAME) \_\_\_\_\_ (M.I.) (LAST NAME) \_\_\_\_\_

G. TOTAL SUBJECT WAGES \_\_\_\_\_ H. PIT WAGES \_\_\_\_\_ I. PIT WITHHELD \_\_\_\_\_

E. SOCIAL SECURITY NUMBER \_\_\_\_\_ F. EMPLOYEE NAME (FIRST NAME) \_\_\_\_\_ (M.I.) (LAST NAME) \_\_\_\_\_

G. TOTAL SUBJECT WAGES \_\_\_\_\_ H. PIT WAGES \_\_\_\_\_ I. PIT WITHHELD \_\_\_\_\_

E. SOCIAL SECURITY NUMBER \_\_\_\_\_ F. EMPLOYEE NAME (FIRST NAME) \_\_\_\_\_ (M.I.) (LAST NAME) \_\_\_\_\_

G. TOTAL SUBJECT WAGES \_\_\_\_\_ H. PIT WAGES \_\_\_\_\_ I. PIT WITHHELD \_\_\_\_\_

E. SOCIAL SECURITY NUMBER \_\_\_\_\_ F. EMPLOYEE NAME (FIRST NAME) \_\_\_\_\_ (M.I.) (LAST NAME) \_\_\_\_\_

G. TOTAL SUBJECT WAGES \_\_\_\_\_ H. PIT WAGES \_\_\_\_\_ I. PIT WITHHELD \_\_\_\_\_

E. SOCIAL SECURITY NUMBER \_\_\_\_\_ F. EMPLOYEE NAME (FIRST NAME) \_\_\_\_\_ (M.I.) (LAST NAME) \_\_\_\_\_

G. TOTAL SUBJECT WAGES \_\_\_\_\_ H. PIT WAGES \_\_\_\_\_ I. PIT WITHHELD \_\_\_\_\_

J. TOTAL SUBJECT WAGES THIS PAGE \_\_\_\_\_ K. TOTAL PIT WAGES THIS PAGE \_\_\_\_\_ L. TOTAL PIT WITHHELD THIS PAGE \_\_\_\_\_

M. GRAND TOTAL SUBJECT WAGES \_\_\_\_\_ N. GRAND TOTAL PIT WAGES \_\_\_\_\_ O. GRAND TOTAL PIT WITHHELD \_\_\_\_\_

P. I declare that the information herein is true and correct to the best of my knowledge and belief.

Preparer's Signature \_\_\_\_\_ Title \_\_\_\_\_ (Owner, Accountant, Preparer, etc.) Phone ( ) \_\_\_\_\_ Date \_\_\_\_\_

DE 6 Rev. 4 (2-04) (INTERNET) MAIL TO: State of California / Employment Development Department / P.O. Box 826288 / Sacramento, CA 94230-6288



Employer identification number   -

Name (not your trade name)

Trade name (if any)

Address

Number  Street  Suite or room number

City  State  ZIP code

**Report for this Quarter ...**  
 (Check one.)

1: January, February, March

2: April, May, June

3: July, August, September

4: October, November, December

Read the separate instructions before you fill out this form. Please type or print within the boxes.

**Part 1: Answer these questions for this quarter.**

1	Number of employees who received wages, tips, or other compensation for the pay period including: <i>Mar. 12 (Quarter 1), June 12 (Quarter 2), Sept. 12 (Quarter 3), Dec. 12 (Quarter 4)</i>	1	<input type="text"/>
2	Wages, tips, and other compensation	2	<input type="text"/>
3	Total income tax withheld from wages, tips, and other compensation	3	<input type="text"/>
4	If no wages, tips, and other compensation are subject to social security or Medicare tax		<input type="checkbox"/> Check and go to line 6.
5	Taxable social security and Medicare wages and tips:		
	Column 1	Column 2	
5a	Taxable social security wages <input type="text"/>	$\times .124 =$ <input type="text"/>	
5b	Taxable social security tips <input type="text"/>	$\times .124 =$ <input type="text"/>	
5c	Taxable Medicare wages & tips <input type="text"/>	$\times .029 =$ <input type="text"/>	
5d	Total social security and Medicare taxes (Column 2, lines 5a + 5b + 5c = line 5d)	5d	<input type="text"/>
6	Total taxes before adjustments (lines 3 + 5d = line 6)	6	<input type="text"/>
7	Tax adjustments (If your answer is a negative number, write it in brackets.):		
7a	Current quarter's fractions of cents	<input type="text"/>	<input type="text"/>
7b	Current quarter's sick pay	<input type="text"/>	<input type="text"/>
7c	Current quarter's adjustments for tips and group-term life insurance	<input type="text"/>	<input type="text"/>
7d	Current year's income tax withholding (Attach Form 941c)	<input type="text"/>	<input type="text"/>
7e	Prior quarters' social security and Medicare taxes (Attach Form 941c)	<input type="text"/>	<input type="text"/>
7f	Special additions to federal income tax (reserved use)	<input type="text"/>	<input type="text"/>
7g	Special additions to social security and Medicare (reserved use)	<input type="text"/>	<input type="text"/>
7h	Total adjustments (Combine all amounts: lines 7a through 7g.)	7h	<input type="text"/>
8	Total taxes after adjustments (Combine lines 6 and 7h.)	8	<input type="text"/>
9	Advance earned income credit (EIC) payments made to employees	9	<input type="text"/>
10	Total taxes after adjustment for advance EIC (lines 8 - 9 = line 10)	10	<input type="text"/>
11	Total deposits for this quarter, including overpayment applied from a prior quarter	11	<input type="text"/>
12	Balance due (lines 10 - 11 = line 12) Make checks payable to the <i>United States Treasury</i>	12	<input type="text"/>
13	Overpayment (If line 11 is more than line 10, write the difference here.)	<input type="text"/>	<input type="checkbox"/> Check one: <input type="checkbox"/> Apply to next return. <input type="checkbox"/> Send a refund.



Name (not your trade name)	Employer identification number
----------------------------	--------------------------------

**Part 2: Tell us about your deposit schedule for this quarter.**

If you are unsure about whether you are a monthly schedule depositor or a semiweekly schedule depositor, see *Pub. 15 (Circular E)*, section 11.

14   Write the state abbreviation for the state where you made your deposits OR write "MU" if you made your deposits in multiple states.

15 Check one:  Line 10 is less than \$2,500. Go to Part 3.

You were a monthly schedule depositor for the entire quarter. Fill out your tax liability for each month. Then go to Part 3.

Tax liability:	Month 1	<input style="width:95%;" type="text"/>	•	
	Month 2	<input style="width:95%;" type="text"/>	•	
	Month 3	<input style="width:95%;" type="text"/>	•	
	Total	<input style="width:95%;" type="text"/>	•	Total must equal line 10.

You were a semiweekly schedule depositor for any part of this quarter. Fill out *Schedule B (Form 941): Report of Tax Liability for Semiweekly Schedule Depositors*, and attach it to this form.

**Part 3: Tell us about your business. If a question does NOT apply to your business, leave it blank.**

16 If your business has closed and you do not have to file returns in the future . . . . .  Check here, and enter the final date you paid wages  /  / .

17 If you are a seasonal employer and you do not have to file a return for every quarter of the year . . .  Check here.

**Part 4: May we contact your third-party designee?**

Do you want to allow an employee, a paid tax preparer, or another person to discuss this return with the IRS? See the instructions for details.

Yes. Designee's name

Phone  (  ) -  Personal Identification Number (PIN)

No.

**Part 5: Sign here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

**X** Sign your name here

Print name and title

Date  /  /  Phone  (  ) -

**Part 6: For paid preparers only (optional)**

Preparer's signature	<input style="width:95%;" type="text"/>		
Firm's name	<input style="width:95%;" type="text"/>		
Address	<input style="width:550px;" type="text"/>	EIN	<input style="width:100px;" type="text"/>
	<input style="width:550px;" type="text"/>	ZIP code	<input style="width:100px;" type="text"/>
Date	<input style="width:60px;" type="text"/> / <input style="width:60px;" type="text"/> / <input style="width:60px;" type="text"/>	Phone	<input style="width:100px;" type="text"/> ( <input style="width:30px;" type="text"/> ) - <input style="width:100px;" type="text"/>
		SSN/PTIN	<input style="width:100px;" type="text"/>

Check if you are self-employed.

# Annual Tax Forms



## ANNUAL RECONCILIATION STATEMENT



PLEASE TYPE THIS FORM - DO NOT ALTER PREPRINTED INFORMATION

00070104

YEAR ENDED \_\_\_\_\_ DUE \_\_\_\_\_ DELINQUENT IF NOT POSTMARKED OR RECEIVED BY \_\_\_\_\_ YEAR \_\_\_\_\_

EMPLOYER ACCOUNT NO. \_\_\_\_\_

**DO NOT ALTER THIS AREA**

DEPT. USE ONLY	P1	P2	C	P	U	S	A
T							

EFFECTIVE DATE: Mo. \_\_\_\_\_ Day \_\_\_\_\_ Yr. \_\_\_\_\_

FEIN \_\_\_\_\_

ADDITIONAL FEINS \_\_\_\_\_

CHECK BOX IF: **A. NO WAGES PAID THIS YEAR**  **B. OUT OF BUSINESS** \_\_\_\_\_ Date \_\_\_\_\_

C. TOTAL SUBJECT WAGES PAID THIS CALENDAR YEAR ..... [ ]

D. UNEMPLOYMENT INSURANCE (UI) (Total Employee Wages up to \_\_\_\_\_ per employee per calendar year)

(D1) UI % [ ] TIMES (D2) UI TAXABLE WAGES [ ] = (D3) UI CONTRIBUTIONS [ ] 0.00

E. EMPLOYMENT TRAINING TAX (ETT)

(E1) ETT % [ ] TIMES UI Taxable Wages (D2) ..... = (E2) ETT CONTRIBUTIONS [ ] 0.00

F. STATE DISABILITY INSURANCE (SDI) (Total Employee Wages up to \$ \_\_\_\_\_ per employee per calendar year)

(F1) SDI % [ ] TIMES (F2) SDI TAXABLE WAGES [ ] = (F3) SDI EMPLOYEE CONTRIBUTIONS WITHHELD [ ] 0.00

G. CALIFORNIA PERSONAL INCOME TAX (PIT) WITHHELD ..... PIT WITHHELD PER FORMS W-2 AND/OR 1099R [ ]

H. SUBTOTAL (Add Items D3, E2, F3, and G) ..... [ ] 0.00

I. LESS: CONTRIBUTIONS AND WITHHOLDINGS PAID FOR THE YEAR (DO NOT INCLUDE PENALTY AND INTEREST PAYMENTS) ..... [ ]

J. TOTAL TAXES DUE OR OVERPAID (Item H minus Item I) ..... [ ] 0.00

If amount due, prepare a Payroll Tax Deposit, DE 88, and mail to P.O. Box 826276, Sacramento, CA 94230-6276. Mailing payments with DE 7 delays payment processing and may result in an erroneous penalty and interest charges. Mandatory EFT filers must remit all SDI/PT deposits by EFT to avoid Non-Compliance Penalty.

K. Be sure to sign this declaration: *I declare that the information herein is true and correct to the best of my knowledge and belief.*

Signature \_\_\_\_\_ Title \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_ Date \_\_\_\_\_  
(Owner, Accountant, Preparer, etc.)

SIGN AND MAIL TO: State of California / Employment Development Department / P.O. Box 826286 / Sacramento CA 94230-6286  
 DE 7 Rev. 4 (1-04) (INTERNET) Page 1 of 2 CU

**Employer's Annual Federal  
Unemployment (FUTA) Tax Return**

▶ See the separate Instructions for Form 940-EZ for information on completing this form.

**2004**

**You must  
complete  
this section.** ▶

Name (as distinguished from trade name)	Calendar year
Trade name, if any	Employer identification number (EIN)
Address (number and street)	City, state, and ZIP code

T	
FF	
FD	
FP	
I	
T	

Answer the questions under **Who May Use Form 940-EZ** on page 2. If you cannot use Form 940-EZ, you must use Form 940.

- A** Enter the amount of contributions paid to your state unemployment fund (see the separate instructions) . . . ▶ \$ \_\_\_\_\_
- B** (1) Enter the name of the state where you have to pay contributions . . . ▶ \_\_\_\_\_
- (2) Enter your state reporting number as shown on your state unemployment tax return ▶ \_\_\_\_\_

If you will not have to file returns in the future, check here (see **Who Must File** in separate instructions) and complete and sign the return. ▶

If this is an Amended Return, check here (see **Amended Returns** in the separate instructions) . . . ▶

**Part I Taxable Wages and FUTA Tax**

1	Total payments (including payments shown on lines 2 and 3) during the calendar year for services of employees	1	
2	Exempt payments. (Explain all exempt payments, attaching additional sheets if necessary.) ▶ _____	2	
3	Payments of more than \$7,000 for services. Enter only amounts over the first \$7,000 paid to each employee (see the separate instructions) . . . . .	3	
4	Add lines 2 and 3 . . . . .	4	
5	Total taxable wages (subtract line 4 from line 1) . . . . .	5	
6	FUTA tax. Multiply the wages on line 5 by .008 and enter here. (If the result is over \$100, also complete Part II.)	6	
7	Total FUTA tax deposited for the year, including any overpayment applied from a prior year . . . . .	7	
8	Balance due (subtract line 7 from line 6). Pay to the "United States Treasury." ▶ _____	8	
9	Overpayment (subtract line 6 from line 7). Check if it is to be: <input type="checkbox"/> Applied to next return or <input type="checkbox"/> Refunded ▶ _____	9	

**Part II Record of Quarterly Federal Unemployment Tax Liability** (Do not include state liability.) Complete only if line 6 is over \$100.

Quarter	First (Jan. 1 – Mar. 31)	Second (Apr. 1 – June 30)	Third (July 1 – Sept. 30)	Fourth (Oct. 1 – Dec. 31)	Total for year
Liability for quarter					

**Third-Party Designee** Do you want to allow another person to discuss this return with the IRS (see the separate instructions)?  Yes. Complete the following.  No

Designee's name ▶ \_\_\_\_\_ Phone no. ▶ ( ) \_\_\_\_\_ Personal identification number (PIN) ▶ \_\_\_\_\_

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and, to the best of my knowledge and belief, it is true, correct, and complete, and that no part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments to employees.

Signature ▶ \_\_\_\_\_ Title (Owner, etc.) ▶ \_\_\_\_\_ Date ▶ \_\_\_\_\_

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions. ▼ DETACH HERE ▼ Cat. No. 10983G Form **940-EZ** (2004)

**Payment Voucher**

**2004**

Use this voucher only when making a payment with your return.

Complete boxes 1, 2, and 3. Do not send cash, and do not staple your payment to this voucher. Make your check or money order payable to the "United States Treasury." Be sure to enter your employer identification number (EIN), "Form 940-EZ," and "2004" on your payment.

1	Enter your employer identification number (EIN). _____	2	Enter the amount of your payment. ▶ _____ Dollars _____ Cents
3		Enter your business name (individual name for sole proprietors). _____ Enter your address. _____ Enter your city, state, and ZIP code. _____	

<b>a</b> Control number		22222		OMB No. 1545-0008			
<b>b</b> Employer identification number (EIN)			<b>1</b> Wages, tips, other compensation	<b>2</b> Federal income tax withheld			
<b>c</b> Employer's name, address, and ZIP code			<b>3</b> Social security wages	<b>4</b> Social security tax withheld			
			<b>5</b> Medicare wages and tips	<b>6</b> Medicare tax withheld			
			<b>7</b> Social security tips	<b>8</b> Allocated tips			
<b>d</b> Employee's social security number			<b>9</b> Advance EIC payment	<b>10</b> Dependent care benefits			
<b>e</b> Employee's first name and initial      Last name			<b>11</b> Nonqualified plans		<b>12a</b>		
			<b>13</b> Salaried employee      Retirement plan      Third-party sick pay		<b>12b</b>		
			<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		<b>12c</b>		
			<b>14</b> Other		<b>12d</b>		
<b>f</b> Employee's address and ZIP code							
<b>15</b> State	Employer's state ID number	<b>16</b> State wages, tips, etc.	<b>17</b> State income tax	<b>18</b> Local wages, tips, etc.	<b>19</b> Local income tax	<b>20</b> Locality name	

Form **W-2** Wage and Tax Statement  
 Copy 1—For State, City, or Local Tax Department

2005

Department of the Treasury—Internal Revenue Service

W-2  
 Federal — Wage and Tax Statement

AC

**DO NOT STAPLE OR FOLD**

<b>a</b> Control number		33333		For Official Use Only ▶ OMB No. 1545-0008	
<b>b</b> Kind of Payer	941 <input type="checkbox"/>	Military <input type="checkbox"/>	943 <input type="checkbox"/>	1 Wages, tips, other compensation	2 Federal income tax withheld
	CT-1 <input type="checkbox"/>	Hshld. emp. <input type="checkbox"/>	Medicare govt. emp. <input type="checkbox"/>	3 Social security wages	4 Social security tax withheld
<b>c</b> Total number of Forms W-2		<b>d</b> Establishment number		5 Medicare wages and tips	6 Medicare tax withheld
<b>e</b> Employer identification number (EIN)				7 Social security tips	8 Allocated tips
<b>f</b> Employer's name				9 Advance EIC payments	10 Dependent care benefits
				11 Nonqualified plans	12 Deferred compensation
				13 For third-party sick pay use only	
<b>g</b> Employer's address and ZIP code				14 Income tax withheld by payer of third-party sick pay	
<b>h</b> Other EIN used this year					
15 State	Employer's state ID number			16 State wages, tips, etc.	17 State income tax
				18 Local wages, tips, etc.	19 Local income tax
Contact person				Telephone number ( )	For Official Use Only
Email address				Fax number ( )	

Under penalties of perjury, I declare that I have examined this return and accompanying documents, and, to the best of my knowledge and belief, they are true, correct, and complete.

Signature ▶

Title ▶

Date ▶

Form **W-3 Transmittal of Wage and Tax Statements**

**2005**

Department of the Treasury  
Internal Revenue Service

Send this entire page with the entire Copy A page of Form(s) W-2 to the Social Security Administration. Photocopies are not acceptable.

Do not send any payment (cash, checks, money orders, etc.) with Forms W-2 and W-3.

**Reminder**

Separate instructions. See the 2005 Instructions for Forms W-2 and W-3 for information on completing this form.

**Purpose of Form**

Use Form W-3 to transmit Copy A of Form(s) W-2, Wage and Tax Statement. Make a copy of Form W-3 and keep it with Copy D (For Employer) of Form(s) W-2 for your records. Use Form W-3 for the correct year. **File Form W-3 even if only one Form W-2 is being filed.** If you are filing Form(s) W-2 on magnetic media or electronically, **do not** file Form W-3.

**When To File**

File Form W-3 with Copy A of Form(s) W-2 by February 28, 2006.

**Where To File**

Send this entire page with the entire Copy A page of Form(s) W-2 to:

**Social Security Administration  
Data Operations Center  
Wilkes-Barre, PA 18769-0001**

**Note.** If you use "Certified Mail" to file, change the ZIP code to "18769-0002." If you use an IRS-approved private delivery service, add "ATTN: W-2 Process, 1150 E. Mountain Dr." to the address and change the ZIP code to "18702-7997." See **Publication 15 (Circular E), Employer's Tax Guide**, for a list of IRS-approved private delivery services.

**Do not** send magnetic media to the address shown above.

For Privacy Act and Paperwork Reduction Act Notice, see back of Copy D of Form W-2.

Cat. No. 10159Y

W-3  
Federal — Transmittal of Wage and Tax Statements

AD



## **Appendix C**

### **SECRETARY TIMELINE**

#### **January**

- W-4 forms to each employee
- W-2 forms to each employee by 31st
- 25, 50, 75-year pin and certificate requests for year may be voted on and sent to Grand Chapter
- Form 941 due IRS and copy to Grand Chapter
- Form DE 6 due State and copy to Grand Chapter
- Form DE 88 due to State
- Complete any 1099s on fees paid to Independent Contractors
- Mail December monthly report to office by 15th
- State Roster available
- Constitution and Laws/Instruction Book Amendments mailed to Chapter with invoice
- Suspend members who are two years in arrears on dues

#### **February**

- W-3 due to IRS by 28th
- Send in order for proceedings by 1st
- Mail January monthly report to office by 15th

#### **March**

- Scholarship applications due this month
- Mail February monthly report to office by 15th

#### **April**

- Form 941 due IRS and a copy to Grand Chapter
- Form 940 due IRS
- DE 6 due State and a copy to Grand Chapter
- Form DE 88 due to State
- Mail March monthly report to office by 15th
- Property Report to Grand Chapter

#### **May**

- Mail April monthly report to office by 15th

## **June**

- Home Endowment Committee report due to Chairman
- Annual Report mailed to Chapter
- Proposed Amendments and Resumes due this month (120 days prior to formal Opening)
- Suspend members who are two years in arrears on dues, or be charged per capita on them
- Mail May monthly report to office by 15th
- Correct Membership roster and return to Grand Chapter

## **July**

- Form 941 due IRS and a copy to Grand Chapter office
- DE 6 due State and a copy to Grand Chapter office
- Form DE 88 due to State
- Annual report due by 15th
- Mail June monthly report to office by 15th

## **August**

- Bill for per capita received by you first part of August
- Send in per capita check and copy of billing to arrive in office by September 1
- If no salaries are paid during year, letter to Grand Chapter office so stating including dates
- Mail July monthly report to office by 15th

## **September**

- Notice of Annual election may be sent to members
- Send in credential request form
- Proposed Amendment booklet due to members (40 days prior to Formal Opening)
- Provide figures to budget committee
- Dues receipts for following year mailed to Chapter
- Mail August monthly report to office by 15th

## **October**

- Form 941 due IRS and copy to Grand Chapter office
- DE 6 due State and copy to Grand Chapter office
- Form DE 88 due to State
- Elections first stated meeting this month
- Pick-up remittance envelopes at Grand Chapter
- Resume of Grand Chapter Session and list of approved amendments sent to Chapters
- Mail September monthly report to office by 15th

**November**

- Send list of elected officers to office by 1st for State Roster
- Chapter Annual Financial Report due by 1st
- Notice of Dues for upcoming year may be sent
- Chapter Installations this month
- Roster Ads due to Chairman by 15th
- Send list of appointed officers to office
- Mail October monthly report to office by 15th

**December**

- Give Secretary and Treasurer reports at first stated meeting following installation
- Notice of Dues for upcoming year may be sent
- Prepare dues receipts for 50 year, remitted, home members & other do ASAP
- Give each employee a W-4 to fill out
- Mail November monthly report to office by 15th

## Notes

## Appendix D

### SECRETARY — TREASURER SUGGESTED PROCEDURES

Enclosed is a form, "Summary of Bills," that may be used to list the bills for the Chapter meeting. The Auditing Committee should audit the bills prior to the meeting and sign the form. Bills that are approved by a motion of the Chapter during the meeting would also be listed. After the meeting, the form together with the bills would be given to the Treasurer for issuance of the checks. The Treasurer would note the check number for each check on the form and return it to you.

You may copy this form for use at each of your meetings. We will also have them available for purchase on the Price List/Order Form. You may wish to do this form in duplicate using carbon paper, so that you will have a copy of the list of bills when you write your minutes, and complete your yellow cash sheet.

#### **Bank Statement:**

Since the Treasurer now has the checkbook, the Secretary will receive the bank statement. After reviewing the bank statement and comparing it to the yellow cash sheet, the statement together with the cancelled checks is to be given to the Treasurer, who will reconcile the checkbook.

The following is a suggested procedure:

#### **Bills:**

- Receive and list the bills for the audit committee to review
- Audit Committee reviews and signs the list
- Read the bills under the proper order of business
- Add to the list any checks authorized by a motion made during the meeting
- At the close of the meeting, give to the Treasurer the list and the actual bills
- The Treasurer will return the summary sheet to you with the check numbers by each disbursement

#### **Yellow Cash Sheet:**

- Enter the disbursements from the summary sheet
- When the copy of the summary sheet is returned from the Treasurer, enter the check numbers

**Treasurer:**

- Receive the bills and summary sheet from the Secretary at the close of meeting
- Record the information in the Treasurer's Cash Book
- Write the checks and record the check numbers on the summary list and in the cash book and return the list to the Secretary

Checks needed for any of the categories on the Check Transmittal Form will be listed on the summary sheet indicating the proper payee. Remember we only need one check per category on the Check Transmittal Form.

Although all bills should be paid as promptly as possible, nothing requires that they be paid the same night that they are received.

## Appendix E

### LESSON #1

#### Lesson for the Month — Chapter Bylaw Changes

Sections of the Constitution and Laws:

- 126 What should be in your bylaws
- 127 Bylaws need approval
- 128 How to obtain approval
- 146 Notice to members

Uniform Code

#### **How to make bylaws changes:**

- A Chapter's Bylaws Committee or a member may make a motion to change the bylaws during a Chapter meeting. No discussion takes place at that meeting. The motion is noted in the minutes.
- The Secretary is directed by the Worthy Matron to notify the members of the change requested including the way the bylaw currently reads, the date of the stated meeting it will be discussed and voted upon. (See Section 146, for example; by mail, at least ten days before the time of the meeting.)
- Following discussion at the stated meeting, the vote is taken, which requires a two-thirds majority vote to pass.
- If a dollar amount is being voted on, the amount may not be increased by amending the proposed bylaw change without starting the process over, however the amount may be decreased but not below the current amount being amended.
- The provisions in our Uniform Code must be included in the bylaws, so when making significant changes, it is easier to use the Uniform Code form and fill in the blanks.
- If you are changing only one particular section of your bylaws, you need only submit that section.

#### **How to obtain approval:**

- The Approval of Amendments to Bylaws form must be used. Two originals of this form must be completely filled out, signed and sealed by the Secretary of the Chapter.
- You must also submit one copy of the bylaw section the way it currently reads together with two copies of the bylaw section the way the Chapter has voted to change that section.
- Send these five (5) things to the Grand Chapter Office.

- We require two originals of the Approval form and the section being changed as we keep one signed by the Worthy Grand Matron in your Chapter file in the office and return the other original to you for your bylaw book.

**Approval:**

- When all forms are received, the packet is sent to the Chairman of the Constitution and Bylaws Committee with a copy of the packet to the members of the Committee.
- After the Committee reviews and approves the amendment to the bylaws, it is given to the Worthy Grand Matron for her approval and signature.
- This process may take as long as a few months.
- The approved amendments are then forwarded to the Grand Chapter office for recording and filing.
- A signed original Approval of Amendments to Bylaws and an original of the bylaws change is sent to the Chapter Secretary.
- The Secretary reads the new bylaw at the next stated meeting at which time the bylaw becomes effective.
- The new bylaw is then placed in the Chapter Bylaw book.
- The members of the Chapter should then be notified of the approved change.

**Notes:**

- If the Committee finds something wrong with the proposed change, the Chapter will be contacted directly by the Constitution and Bylaws Committee.
- A Chapter may have Standing Rules of items that are not in the bylaws. Changes of the Standing Rules at a meeting, without prior notice to members, require a 2/3 majority. If notice (Sec. 146) has been sent to members, then it only requires a simple majority (more than 50% of the vote).
- Standing Rules have another advantage/disadvantage over bylaws in that they can be suspended at any meeting by a majority vote.
- Chapters that are rewriting the bylaws because of consolidation should use the Uniform Code form and must use the Approval of Amendments to Bylaws of a Consolidating Chapter form.



## **Appendix F**

### **LESSON #2**

#### **Lesson for the Month — Check Transmittal Form**

The Check Transmittal Form is provided for the Secretary or the Treasurer to use when sending checks to the office. The form is divided into four sections representing the four checking accounts into which the Grand Chapter office makes deposits. The accounts are: California Eastern Star Foundation, Grand Chapter Endowment Fund, Eastern Star Homes of California, and Grand Chapter of California.

Since 9/11/2001, banks are very particular in accepting checks. They actually look at each check in our various deposits to verify that it is payable to the proper account. For example, checks made out to the Scholarship Fund, Senior Living Community, Eastern Star Home Endowment Fund, Heart Fund, etc. will not be accepted for deposit.

There are only four specific ways to make out a check. It must be payable to either the California Eastern Star Foundation, Grand Chapter Endowment Fund, Eastern Star Homes of California, or Grand Chapter of California. The memo line on a check may be used to specify the particular use: J.C. Lee, Restricted or Unrestricted Endowment Fund, Heart Fund, credentials, etc.

On the Transmittal Form, under each of the four main categories, are listed the various funds that may be deposited in that category. For example, under the California Eastern Star Foundation are our charities that are under the umbrella of the Foundation. Under Grand Chapter Endowment Fund are funds that go directly to the Endowment including funds used for the operation of the Home, Life Sponsorship, and Star Plus donations. Donations to the Eastern Star Homes of California category are funds sent in for holidays for the residents and funds from the Fiesta. The fourth category, Grand Chapter of California, is the account used by the office and for Grand Chapter Week funds.

The California Eastern Star Foundation, the Grand Chapter Endowment Fund and the Eastern Star Homes of California are all 501(c)(3) organizations. The Grand Chapter of California is a 501(c)(8) organization. Funds donated to 501(c)(3) organizations are tax deductible, but donations to a 501(c)(8) organizations are not.

Please note that donations to the Heart Fund are to be made payable to Grand Chapter of California. This is a General Grand Chapter project and is not under our own California Eastern Star Foundation. See Section 420 of the Constitution and Laws.

Also under this category is the Perpetual Income Fund of Grand Chapter established in 2002 as a trust fund for voluntary contributions to provide a source of continuing income to partially fund the operation of the Grand Chapter administrative, operational and support services. See Section 95A of the Constitution and Laws.

Checks that are not made out with the proper payee will be sent back to the Chapter or to the individual writing the check. We simply cannot deposit them. This is especially important to remember if a member passes away and the obituary in the paper states to send the remembrance to, for example, J. C. Lee Cancer Fund at Grand Chapter. Remind members placing obituaries of the correct payee, with a note on the check that it is for a particular fund.

After the information on the Check Transmittal Form has been processed, we file the 8½ inch by 11 inch form by Chapter for our Auditors to use. Therefore, please do not cut each section apart and attach the checks to it OR we then have to put the form back together again!

Also, we are like the utility companies. Please do not staple, paperclip, tape, glue etc. the checks to the various sections. They will not get lost in the envelope and if the form has been properly completed, we can see what check is meant for what. It takes time to un-staple the checks, etc.

In addition, only one check has to be written for each of the four specific categories. You may have received donations for, say, the Disaster Fund, J. C. Lee Memorial Cancer Fund, and Scholarship one meeting and the Scholarship Fund and Marguerite Rennie Memorial Fund the next meeting. One check for the total amount payable to the California Eastern Star Foundation is all that is necessary. On the Check Transmittal Form you would indicate how much of that check went to each fund in that category.

It is also the Secretary's responsibility to acknowledge those donations as noted on the Check Transmittal Form, but that is another lesson!

Another way to save you time and your Chapter money: send everything in one envelope to the Grand Chapter office. Only one person opens the mail, so everything filters through her. She sorts the mail to the various departments that handle that item. Our record: seven envelopes in one day from one Chapter.

On the Check Transmittal form you will notice it states “See Green Form attached” or “See Order Form attached.” These particular items have their own order forms, as we require additional information to what is listed on the Check Transmittal Form. Therefore, it is not necessary to use a Check Transmittal Form when sending in orders for Life Sponsorship purchase, supplies, anniversary pins, Rob Morris Awards, Service Awards, or credentials, unless you are sending in donations also. We have listed these items on the Check Transmittal Form to enable you to send in just one check.

**Remember:**

- Select the proper category on the Check Transmittal Form
- Fill out that section on the Transmittal Form completely
- Write the check to the proper payee
- Verify the written amount on the check and the dollar amount agree
- Two signatures must be on the check
- Checks cannot be deposited if more than six-months old
- Do not cut the form apart
- Do not staple, clip or glue the checks to the form

## Notes

## Appendix G

### LESSON #3

#### Lesson for the Month — Timeline for Suspension of Members

##### Year A (2008)

September — *Notice of Annual Election* (includes notice of dues — not required, unless elections not being held in October) [for upcoming year B]

November/

December — *Notice of Dues* [for year B] — may be sent several times, should use through December, year B.

##### Year B (2009)

January 1 — 1/2 or full dues due (depends upon bylaws) [for year B]

July 1 — 1/2 dues due (depends upon bylaws) [for year B]

September — *Notice of Annual Election* (includes notice of dues — not required, unless elections not being held in October) [for upcoming year C]

November/

December — *Notice of Dues* [for year C] — may be sent several times, should use through December, year C.

##### Year C (2010)

January — *Reminder of Dues* [for year B] — may be sent several times, until WM directs to send *Notice of Delinquent Dues*, which should happen no earlier than May 15, year C.

January 1 — 1/2 or full dues due (depends upon bylaws) [for year C]

May/June — DEADLINE: Should inform WM of delinquent members, who have not paid all dues for year B. With her approval may send out *Notice of Delinquent Dues*, via certified mail with return receipt requested. This notice must be sent out at least one month before the stated meeting at which the member is to be suspended.

July — If above notice was sent one month before the July stated meeting, this is the first month in which a member may be suspended for not having paid all of year B dues.

If a member is suspended, must send *Notice of Suspension*.

July 1 — 1/2 dues due (depends upon bylaws) [for year C]

September — *Notice of Annual Election* (includes notice of dues — not required, unless elections not being held in October) [for upcoming year D]

November/  
December — *Notice of Dues* [for year D] — may be sent several times, should use through December, year D.

DEADLINE: Must inform WM of delinquent members, who have not paid all dues for year B. With her approval may send out *Notice of Delinquent Dues*, via certified mail with return receipt requested. This notice must be sent out at least one month before the stated meeting at which any action the member is to be suspended.

#### Year D (2011)

January — *Reminder of Dues* [for year C] — may be sent several times, until WM directs to send *Notice of Delinquent Dues*, which should happen no earlier than May 15, year D.

Must, at a stated meeting on or after January 1, remit outstanding year B dues or suspend member. It is the Secretaries duty at this time to bring to the attention of the Chapter any member who is delinquent for year B dues, especially if the Worthy Matron previously directed that she/he should not send a *Notice of Delinquent Dues* to delinquent members.

If a member is suspended, must send *Notice of Suspension*.

January 1 — 1/2 or full dues due (depends upon bylaws) [for year D]

- May/June — DEADLINE: Should inform WM of delinquent members, who have not paid all dues for year C. With her approval may send out *Notice of Delinquent Dues*, via certified mail with return receipt requested. This notice must be sent out at least one month before the stated meeting at which the member is to be suspended.
- June 30 — If members who are delinquent for year B dues are not suspended before this date, additional Grand Chapter Dues and Assessments will be levied against the Chapter for this member.

NOTE: A Chapter may vote, at any time, to remit all or any portion of the dues owed by a member.

If all of a member's dues are remitted, due to an inability to pay, prior to June 30 of the year in which the dues are first due, the Chapter will not pay Grand Chapter dues & assessments on that member. If the remission occurs after June 30 of the year in which the dues are first due, the Chapter must pay Grand Chapter dues & assessments on that member, and those dues & assessments are not refundable.

A member may not be suspended for non-payment of dues that have been remitted by the chapter.

## Notes



## **Appendix H**

### **LESSON #4**

#### **Lesson for the Month — Dues forms, descriptions and when to use**

The dues payable on January 1, 2010 will be used throughout this document as the basis for the years given in parentheses. For dues from other years, please adjust the years accordingly.

##### ***Notice of Annual Election***

Notice of the Chapter's annual election of officers is required only when those elections will not be held in October (see C&L Sec. 130). Even if notice is required, use of this form is optional (see C&L Sec. 253). If notice is being given by mail, it must be sent at least 10 days prior to the meeting date (see C&L Sec. 146). So, this form could be used as early as August (2009) and as late as November (2009), but it will usually be used in September (2009) or October (2009).

The reason for including this form with the dues notices is that it includes a reminder that dues are coming due in January (2010). The updated form has retained that reminder and has an added reminder for those who have not paid their current dues (2009) — or even have past years' dues (2008 and earlier) outstanding.

While most of the forms are 8½" x 11", this is one of the forms that is a half-sheet — 5½" x 8½". This was done for a couple of reasons. First, we couldn't come up with enough filler to make it look good on a full size sheet of paper. Second, this is a form that, when used, is to be sent to every member of the Chapter; so we wanted to keep the Chapter's cost as low as possible.

##### ***Notice of Dues***

Use of this form is optional (Sec. 153). The form can be used from the November before the dues are due (November 2009) through the December of the following year (December 2010).

The Notice of Dues includes a reminder for dues and assessments that are past due. It is also one of the forms that is still on a half-sheet, for the same reasons as the Notice of Annual Election.

### ***Reminder of Dues***

Use of this form is optional (Sec. 153). While this form can be used as soon as the January that the dues are first due (January 2010), we recommend that it not be used until the following January (2011), because it is a little too harsh to be used immediately after the dues are first due. It can continue to be used until the Worthy Matron is prepared to suspend the member, which cannot take place until July 1 of the year following when the dues were first due (July 1, 2011).

The form has a place to include the names and addresses of the officers on the Relief Committee. The section that reads, “. . . shall be paid \_\_\_\_\_ in advance”, is a quote from the Uniform Code of Bylaws. The blank should be filled with either, “annually on January first”, or, “semi-annually on January first and July first”. The form does not include a separate place for dues and assessments that are past due, because all amounts on this notice are past due. So if it is March 2010, and the member has not paid 2009 and 2010 dues and assessments, all of those amount should be included in the appropriate locations.

### ***Notice of Delinquent Dues***

Use of this form is optional, but highly recommended. Since it includes the portion of the C&L that deals with suspension, it lets the member know what is about to happen. This is the final notice before suspension, and should only be sent once, at least one month prior to the meeting at which the member is to be suspended. Since a member cannot be suspended for non-payment of dues until at least July 1 of the year following when the dues were first due (July 2011), this notice should not be sent until at least the middle of May of that year (May 2011). (i.e. a member who has not paid 2010 dues cannot be suspended until at least July 1, 2011.)

### ***Notice of Suspension***

Use of this form is optional, but also highly recommended, because it provides the section of the C&L dealing with how a member gets reinstated after suspension. It is to be sent to the member immediately following the meeting at which she/he is suspended. We recommend that it be prepared beforehand, so that as soon as the meeting is completed, it can be signed and the Chapter seal applied.

### **Other forms**

In addition to the above forms, several other forms there are several other form we wanted to bring to your attention. The first three are related to dues and deal with the suspension and reinstatement of a member. The others are just miscellaneous forms.

#### ***Notification of Suspension of Dual Member***

The use of this form is optional. However, Sec. 249 of the C&L requires that a notice be sent when a dual member is suspended. This form can be used, not just when a dual member is suspended for non-payment of dues, but any time a dual member is suspended.

#### ***Notification of Restoration of Dual Member***

The use of this form is also optional. The Constitution and Laws does not require any notice of restoration of a dual member to be sent. However, since you notified the “dual” Chapter that the member was suspended, it is the policy of the Grand Secretary, that you shall notify them when the member is restored.

The paragraph with the check box is to be used when a Petition for Reinstatement, of a member who has been suspended for over six months and has paid the necessary fees, is rejected.

#### ***Certificate of Restoration***

Use of this form is mandatory! (See C&L Sec. 253). It looks similar to a Demit, because it is, in effect, a Demit. It is to be given to a member who was suspended, other than by trial, for longer than six months and who paid the fees required by the Chapter to be restored, but whose Petition for Reinstatement was rejected.

#### ***Notice of Rejection***

Use of this form is optional (Sec. 253); however, its use is highly recommended. When a Petition for Initiation or a Petition for Affiliation is rejected, notice of that rejection must be sent to the petitioner (see Sec. 223 of the C&L), and Sec. 223 must be printed on any such notice.

Note that this form would not be used when a Petition for Reinstatement is rejected, in which case you would use a Certificate of Restoration. It is only used when a Petition for Initiation or a Petition for Affiliation is rejected.

### ***Notice of Special Election***

Use of this form is optional; however, if a special election — an election other than the annual election — is to be held, notice of that election must be given to members (see C&L Sec. 135). Regardless of whether or not this form is used, any notice should not state what office is being filled. Sec. 146 requires that any mailed notice be sent at least ten days prior to the meeting.

This form is on a half-sheet for like reasons as the Notice of Annual Election.

### ***Request for Demit***

Use of this form is completely optional. All a member must do to demit from a chapter, is to send the Chapter a note, which she/he has signed, stating, “I request a Demit from this Chapter”. Or the member can be recognized in open Chapter and say the same thing.

This form provides a place for the member to indicate why she is leaving the chapter. It also has a place to remind the Secretary that the member is a dual/plural member — so notice can be sent to the other Chapter that the member has terminated her/his membership, and also so the Secretary knows to give the member a Certificate of Discontinuance of Multiple Membership rather than a Demit. The form also reminds the member that her/his current dues receipt must be turned in with the Request in order to receive a refund of remaining dues, and it provides the member with additional information regarding Demits.



