

**GRAND LODGE OF ANCIENT FREE AND ACCEPTED MASONS OF MONTANA**

**ANNUAL RETURN FOR 2008**

**2009**

This RETURN **must** include all membership activity occurring during the period **January 1, 2009 through December 31, 2009**. Membership activity includes all Degrees Conferred, Affiliations, and Dual/Multiple Memberships, Reinstatements, Suspensions, Dimitts, Deaths, Dues Remitted, and Fifty year Memberships. All membership changes should have been previously reported on the Monthly Report as this is a recap of prior actions.

This RETURN, together with the Per Capita payments and all assessments not previously paid must be sent to the Grand Secretary before **March 15, 2010**, to avoid paying a late fee (SEC. 25070). Assessments include Candidate's Fees (SEC. 6030) and Reinstatement Fees (SEC. 6020). **Please print or type**. If you have questions, write or call (406) 442-7774. or email to [Andrew@grandlodgemontana.org](mailto:Andrew@grandlodgemontana.org)

**LODGE NAME:** \_\_\_\_\_ **NUMBER:** \_\_\_\_\_

**LOCATION:** \_\_\_\_\_

**OFFICERS ELECTED AND APPOINTED TO SERVE THIS LODGE DURING**

2008-2009 Officers		2009-2010 Officers
	Worshipful Master	
	Senior Warden	
	Junior Warden	
	Treasurer	
	Secretary	
	Senior Deacon	
	Junior Deacon	
	Chaplain	
	Senior Steward	
	Junior Steward	
	Marshal	
	Tyler	
	Organist	
	Instructor	
	Historian	

Included is your **MEMBERSHIP ROSTER AS OF DECEMBER 31, 2008**. The number of members on this roster is the "starting point" (line A, page 7) for calculating per capita on this **ANNUAL RETURN FOR 2009**.

**DEGREES CONFERRED DURING 2009**

Enter all Degrees conferred with date of conferral. Total each column, E.A., F.C., and M.M. **Transfer the total of the M.M. Column to Page 8, Line B.**

Full Given Name	E.A. Date	F.C. Date	M.M. Date	M.M. Prof. Date
Total M.M.				

**AFFILIATIONS & MULTIPLE MEMBER AFFILIATIONS (SEC. 34020 & 37060) - 2009**

All Affiliations and Dual/Multiple Affiliations with your lodge during the year of this Annual Return 2009, **must** be entered below. Under "DIMIT DATE" report the date of election of the member. Behind the name of the member write the word "**dual**" or "**multiple**" in parentheses. **Total and transfer total to Page 8, Line C.**

Full Given Name	Transfer?	Dual/Plural	Name/No Jurisdiction	Dimit Date
Total Affiliations				

**REINSTATEMENTS DURING THE YEAR - 2009**

All Reinstatements (SEC. 41080) with your lodge during the year of this annual Return **must** be listed below. Total and transfer total to Page 8, Line D. Note: Enter all dates as an eight (8) digit number MM/DD/Year.

Full Given Name	Date
Total Reinstatements	

**SUSPENSIONS FOR NON-PAYMENT OF DUES (SEC. 41060) - 2009**

All members suspended for Non-payment of Dues (NPD) **must** be listed below. **Total and transfer total to Page 8, Line G.** A suspension for NPD can only be made on December 31 of the year dues are twelve months in arrears and becomes effective as of 1 January.

Full Given Name	Date
Total Suspensions for Non-Payment of Dues	

On this page, page 4 enter and calculate the total for each category. **Transfer total to the appropriate line on Page 8, Line H, I, J, K, L and M.**

**DIMITTED TO JOIN OTHER LODGES (SEC. 34060) – 2009**

Full Given Name	Other Lodge / Jurisdiction (ex. # 8 / Idaho)	Date
H		
H		
Total Dimitted to Join Other Lodges		

**WITHDRAWAL OF MULTIPLE MEMBERSHIP (SEC. 34060) - 2009**

Full Given Name	Retained with:	Date
I		
I		
Total leaving – Withdrawl of Dual/Multiple Membership		

**DIMITTED TO BE NON-AFFILIATE (SEC. 34060) – 2009**

Full Given Name	Date
J	
J	
Total Dimitted to be Non-Affiliate	

**SUSPENDED FOR UN-MASONIC CONDUCT (SEC. 46020) – 2009**

Full Given Name	Date
K	
K	
Total Suspended for Un-Masonic Conduct	

**SUSPENDED AFTER CONVICTION OF A FELONY (SEC. 1050[O]) – 2009**

Full Given Name	Date
L	
L	
Total Suspended under Section 1050[O]	

**SUSPENDED AFTER FAILED TO RETURN PROFICIENCY C (SEC. 39070.D) – 2009**

Full Given Name	Date
<b>L 1</b>	
Total Suspended under Section 39070. D.]	

**EXPELLED AFTER MASONIC TRIAL - 2009**

Full Given Name	Date
<b>M</b>	
Total Expelled after Masonic Trial	

**DECEASED**

Enter the names of the members of your lodge who died during 2009, **or** who died during any previous year but who have not been reported to Grand Lodge as of this ANNUAL RETURN. Also, be sure to include those members reported to Grand Lodge under SEC. 35080 of the Code of Statutes. **Total and transfer total to Page 8, Line N.**

Full Given Name	PM?	50-Year?	Date of Death
<b>N</b>			
Total Deaths			

**DUES REMITTED (SEC. 41050) - 2009**

Enter the names of Masons of your lodge whose dues were remitted under SEC. 41050 of the Code "...because of inability to pay..." In the column headed "DATE" enter the **2009 date** your lodge **voted** to remit the member's dues and the action recorded in the Lodge's minutes. **Total and transfer total to Page 8, Line R.**

Full Given Name	Date
Total Members with Dues Remitted	

**FIFTY-YEAR MEMBERS CREATED DURING THE YEAR (SEC. 35070)**

Enter the names of the members of your lodge who were awarded the Fifty-year Certificate and Emblem from the Grand Lodge of Montana during the year, January 1 to December 31, 2009, as provided in SEC. 35070 of the Code of Statutes.

Full Given Name	Date of Award
Total 50-year Created	

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**Pre-paid Life Members are not included in the calculation of your annual return and are entirely separate. You pay per capita on them but they no longer pay dues because of the purchase of a life membership. The return of the interest on their contribution is handled separately from the annual return. You will receive a check for these later.**

**Century Club Eligible Members. Refer to the Roster for 2008 for the number of eligible Century Club members. Only those listed as CC (Elig) qualify. Once a CC Elig member has died this is no longer available. Do not count CC Elig members who have died during 2009.**

**RECAPITULATION - ANNUAL RETURN FOR 2008**

	Beginning	Gain	Loss	Subtotal
A. <b>Number of Masons</b> (as of Dec. 31, 2008 Roster)				
B. Number <b>raised</b> during 2009 (page 2)				
C. Number <b>affiliated</b> during 2009 (page 2)				
D. Number <b>reinstated</b> during 2009 (page 3)				
E. <b>Total gains</b> during 2009 (total of B + C + D)				+
F. Total number accounted for (total of A + E)				
G. Number suspended <b>NPD</b> during 2009 (page 3)				
H. Number <b>dimit - join other</b> during 2009 (page 4)				
I. Number <b>withdraw multiple</b> during 2009 (page 4)				
J. Number <b>dimit non-affiliate</b> during 2009 (page 4)				
K. Number <b>suspended unmasonic conduct</b> (page 4)				
L. Number <b>suspended under Code 1050[O]</b> (page 4)				
L.1. Number <b>suspended under Code 39070 D.</b> Failed to give a satisfactory examination in the proficiency for EA and FC (page 5)				
M. Number <b>expelled after trial</b> (page 5)				
N. Number <b>deceased</b> (& Sec. 35080) (page 5)				
O. Total Losses during 2009 (total of G through N)				-
P. Total M.M. on Dec. 31, 2009 (F minus O)				=

## CALCULATION OF PER CAPITA PAYMENT

Please note: only count masons if they still active and alive as of December 31, 2009.

	# members		\$ dollars
<b>Q. Total Per Capita (Line P above)</b>		<b>* \$25.30 each =</b>	
R. Dues remitted (page 6)		* \$25.30 each =	
S. 50-year masons (roster + page 6 – lost)		* \$25.30 each =	
T. Century Club (Elig) members (roster)		* \$6.75 each =	
<b>U. Total Deductions</b>		<b>R + S + T =</b>	
<b><u>V. Net Amount Due</u></b>		<b><u>Q – U =</u></b>	

**Grand Lodge of Montana  
Annual Lodge Financial Disclosure**

**Lodge Name** **Number**

**Tax Number (TIN or EIN)** **Report for year ending**

**Abbreviated Balance Sheet**

<b>Assets</b>	<b>Liabilities</b>
Cash & Deposit Accounts	Accounts Payable
Investment Accounts	Notes & Loans Payable
Furniture & fixtures	Other liabilities
Real estate	
Other assets	
	<b>Total liabilities</b>
<b>Total assets</b>	<b>Equity (assets – liabilities)</b>

**Summary of Receipts and Disbursements**

<b>Receipts</b>	<b>Disbursements</b>
Interest Income	Per Capita to Grand Lodge
Investment Income	Building expense
Degree Fees & Charges	Donations & Charity
Donations received	Furniture & Equipment exp.
Dues & Assessments	Interest paid
Rental Income	Lodge Supplies
Other Income	Rents Paid
	Wages & Salaries
	Other Expense
<b>Total Receipts</b>	<b>Total Disbursements</b>

**Cash Reconciliation**

<b>Beginning Cash</b>
<b>Plus total receipts</b>
<b>Less total disbursements</b> <span style="float: right;"><u>                    </u></span>
<b>Ending Cash</b>

Submit a 990-N e-Postcard to the IRS, if gross receipts are less than \$25,000.00

Submit a 990 or 990-EZ to the IRS, if gross receipts are more than \$25, 000.00

## MEETINGS HELD DURING THE YEAR

Number of Stated Communications (enter number of stated meetings held each month of 2009).

Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec

Number of Special Meetings for Work..... \_\_\_\_\_

Number of Educational or Social Meetings..... \_\_\_\_\_

## CERTIFICATION

We certify that this **ANNUAL RETURN FOR 2009** is correct to the best of our knowledge and belief, and that the books of this Lodge have been duly audited for the Masonic year ending December 31, 2009, as required in SEC. 25070 and 28080 of the Code of Statutes and the Annual lodge financial disclosure worksheet is attached.

**(LODGE SEAL)**

**date**

**signature**

**Worshipful Master**

**date**

**signature**

**Treasurer**

**date**

**signature**

**Secretary**