

FINANCIAL SECRETARY FAITHFUL COMPTROLLER HANDBOOK



KNIGHTS *of* COLUMBUS

NOTICE TO FINANCIAL SECRETARY AND FAITHFUL COMPTROLLER

This handbook is intended for use by council financial secretaries and assembly faithful comptrollers. Faithful comptrollers should ignore Third Degree and council references, substituting Fourth Degree terminology where applicable. Where minor differences exist between Third Degree and Fourth Degree Laws or procedures, they are so noted. **Any questions arising from Fourth Degree use can be directed to the Department of Membership Records at: membership@kofc.org.**

Financial secretaries and faithful comptrollers should make this handbook available to other officers and chairmen as appropriate and should call their attention to the various sections that pertain to their responsibilities. For example, while the grand knight/faithful comptroller should have an interest in the entire handbook, he must acquaint himself specifically with account keeping and the monthly Statement. The trustees, along with the treasurer/faithful purser, must review the Audit section which provides instructions on completing the Audit Report.

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**GENERAL
INFORMATION**

OFFICERS ONLINE — REGISTRATION

The grand knight, faithful navigator, financial secretary, faithful comptroller, advocate and faithful pilot have access to the Officers Online section of the Order's website. The Reports Online section of Officers Online provides the ability to view council records such as the roster, membership statistics and support materials. The grand knight/faithful navigator and financial secretary/faithful comptroller have access to Member Management, but only the financial secretary/faithful comptroller have access to Member Billing. The grand knight/faithful navigator and advocate/faithful pilot have access to the Order's Bylaws online.

Once the Supreme Council office records the new officers in its database, an Invitation Code is generated for each eligible officer. Returning officers that have not registered the previous year may use their Invitation Codes received by mail the year before. If you have misplaced your Invitation Code, you can call the Customer Service Department (800) 380-9995 for assistance. Members holding multiple officer positions will only need to be registered with one account, and on the Reports Online screen, a Change Role link will display in the upper right-hand corner. A member's officer account can be reused if he serves under a different officer role or returns to a position that requires access to Officers Online.

To register your online account, you must have received your personal Invitation Code and then go to *kofc.org/register*. During the registration process, you will be asked to enter your Invitation Code, member number and council number. You will also need to pick a user name and password, select security questions and provide answers as well as enter your email address. If further assistance is needed, you can contact Customer Service at the Supreme Council office.

ELIGIBILITY — FINANCIAL SECRETARY

The Laws and Rules of the Order set forth the following requirements for appointment of a financial secretary:

Only members who have been initiated in the first three degrees of the Order shall be eligible for any office in subordinate, state or Supreme councils or in the Order. This shall not apply to the first officers of a new subordinate council. . . (Section 92).

In addition, Section 128 of the Laws and Rules makes the following provision regarding the appointment of a financial secretary:

...The financial secretary shall be appointed by the Supreme Knight. He shall hold office at the will of the Supreme Knight.

As stated, the financial secretary must be a Third Degree member of the Order, at least 21 years of age and cannot be engaged in the sale of life or health insurance for another organization. The financial secretary cannot be a convicted felon and should not hold another elected council position.

In regard to college councils, at the October 1991 meeting of the Board of Directors, it was voted that new college councils may not be instituted unless a member of the faculty or staff of the school or a permanent resident of the local community has agreed to serve in the position of financial secretary. It was further voted that this regulation should also apply to financial secretary reappointments in college councils.

Financial secretary applicants who fail to meet any of the above requirements will not be considered for appointment. Financial secretaries who become engaged in the sale of life or health insurance for another organization after accepting appointment must notify the Supreme Knight immediately so arrangements can be made for the appointment of a successor to the office.

If a financial secretary must resign from office before the end of the term, he should send a brief letter of resignation to the Supreme Knight noting the effective date of the termination and the reason for doing so. This should be done as far in advance as possible. It is to be remembered that every financial secretary has been appointed on the condition that he will remain in office, if needed, until the Supreme Knight has been able to appoint the new financial secretary. Hence, the importance of advance notice cannot be overemphasized. Sufficient time is needed to secure applicants for the position and to process the paperwork required for the appointment.

When the financial secretary's resignation is acknowledged by the Supreme Knight or if a vacancy occurs for some other reason, the grand knight is provided with complete instructions and forms (FS 101 — Application and FS 103 — Nomination) for the appointment of a successor to the office. The forms are pictured on pages 12 and 13. The grand knight will then nominate one or more members. The Supreme Knight requires that the trustees concur in the selection of applicants. They do this by signing the Nomination form (FS 103) in the space provided. When all of the forms have been completed and returned, the Supreme Knight will make a new appointment. The appointment will be mailed directly to the newly appointed financial secretary, with a copy to the state deputy, the district deputy, the grand knight and the general agent. If the jurisdiction has an executive secretary, he, too, will receive a copy of the appointment. The appointment takes effect on the date it is issued and will run for a period of three years from that date.

In cases where a financial secretary fails in the performance of his duties, the grand knight and trustees should send a statement of facts to the Supreme Knight. The statement should be based on the Laws of the Order, principally Section 139. A copy of the statement should be provided to the state deputy.

If a financial secretary is aware that he will be incapacitated by illness for more than three or four weeks, it is his obligation not only to advise the grand knight, but also to make arrangements for normal council operation. The accounts should be turned over to the board of trustees who should select a temporary financial secretary. If there is an accountant available in the council, the board of trustees could request his assistance.

Where a financial secretary is unable to make arrangements in advance and the grand knight has knowledge that the financial secretary will be unable to carry out his duties for some time, the grand knight should obtain the council records and any moneys in the possession of the financial secretary. This should and can be done by tactfully explaining the council's position either to the financial secretary or to a member of his family.

EVALUATION — FINANCIAL SECRETARY

Ninety days prior to the conclusion of a financial secretary's three-year term, the grand knight of the council is advised that an evaluation of his performance in the office must be made and returned to the Supreme Knight before consideration will be given to re-appointment for an additional three-year term. The financial secretary receives a copy of the Supreme Knight's letter to the grand knight.

The Evaluation (Form #1938), illustrated on page 14, calls for the grand knight, the three trustees and the council's district deputy to evaluate the financial secretary by checking one of the four designations, i.e., excellent, good, fair or poor in each of the eight categories shown on the form. Space is also provided to indicate recommendation or non-recommendation for re-appointment and the current occupation of the financial secretary. The completed evaluation must include the signatures of the grand knight, the trustees and the district deputy before forwarding to the state deputy for his endorsement and subsequent mailing to the Supreme Knight.

SELECTION OF FAITHFUL COMPTROLLER

Fourth Degree Laws provide that the faithful comptroller be elected, along with the other officers of the assembly, at the first regular business meeting held in June of each year.

BONDING

The financial secretary, upon appointment by the Supreme Knight, is automatically bonded at no charge to the council in the amount of \$5,000.00. The same is true for the council treasurer and both the assembly comptroller and purser when the appropriate Officer Reports are processed at the Supreme Council office. Additional bonding may be obtained at a cost of \$7.00 per thousand.

Please be guided by the following:

- Bonding is on the office, not the person holding the position.
- Additional coverage is requested by writing to the Supreme Secretary.
- Bonding on the covered officers is limited to \$125,000 of total coverage per council or assembly, including the provided \$5,000 of coverage on each officer.
- Bonding runs from March 1 to the end of February, and any charge for additional coverage is posted on the council or assembly account annually in March or April. The charge is prorated if purchased at another time during the year.
- The last two council/assembly audits must be on file in the Supreme Council office or bonding will not be in effect.

ADHERENCE TO SUPREME COUNCIL RULES

Adherence to Supreme Council requirements in accounting for moneys and recording membership additions and changes is most important and cannot be stressed enough.

The Supreme Council has developed an effective accounting system for subordinate council use that provides checks and balances in accounting for council funds. The burden of accounting for moneys is not placed on the shoulders of any one individual and involves not only the financial secretary, but the district deputy, grand knight, trustees and treasurer. The district deputy, grand knight and trustees are obligated to make certain that all council records are properly maintained, that moneys are accounted for and that all members are properly recorded on Supreme and subordinate council rolls.

The financial secretary who "cuts corners" in his accounting system not only confuses himself, but also makes it more difficult for those whose responsibility it is to make routine examination of the council books and conduct the audits.

Likewise, the reporting of member additions or changes to the Supreme Council office on improper forms often results in incomplete information being provided and delays in processing.

INITIATION FEES AND COUNCIL DUES

The Laws and Rules prescribe that the initiation fee shall be fixed by the council, provided, however, no initiation fee shall be required of any priest or member of a religious community who applies for membership. Permanent deacons and seminarians **are** subject to initiation fees. The rules also provide that for those entering under 26 years of age, the initiation fee shall not exceed \$10.00. In cases of juvenile to adult transactions, the maximum initiation fee is \$5.00, provided application is made prior to the applicant's nineteenth birthday.

Likewise, the Laws and Rules set forth specific provisions regarding dues payable by each member. Dues shall be levied in advance in an amount as fixed by the council. The dues for all associate and insurance members shall be the same, and they must not be less than \$5.00 per year. However, councils may fix a different rate of dues for insured members under 26 years of age, but the same shall not be less than \$3.00 per year.

DUTIES

COLLECT AND RECEIVE ALL MONEYS

The financial secretary shall collect and receive all moneys due the council and all funds obtained from any source (Section 139 — Laws and Rules of the Order).

BILLING PROCEDURES

The financial secretary will mail the Membership Bill — First Notice **15 days prior to the billing period.**

If payment is not received **in 30 days**, the financial secretary will mail the Membership Bill — Second Notice.

If payment is still not received within **30 days from the date the second notice was sent...**

- The financial secretary will provide the names, addresses, telephone numbers and amounts of delinquency for each member in arrears to the retention committee. The committee should include — but is not limited to — the grand knight, chairman ex officio; membership director; retention chairman; trustees; and proposer, if available.
- A Knight Alert letter Form #KA1 will be forwarded to each delinquent member, signed by the grand knight and trustees (not applicable in the Fourth Degree).
- The grand knight will assign a member of the retention committee to make personal contact with the delinquent member to remind him of his obligation.

The committee member will provide a written report of his findings to the grand knight. If the member is experiencing financial difficulty, the grand knight will direct the committee members to visit the member and make arrangements to accommodate him with either a payment plan or other financial arrangement acceptable to the council. Again, a full report is to be provided to the grand knight as to why the member is delinquent and why he is considering leaving the Order. **Financial difficulty is not a valid reason for suspension.**

If **at the end of the second month** of arrearage the member still has not paid his dues, the Notice of Intent to Suspend (Final Notice in the Fourth Degree) is to be prepared and signed by the financial secretary and grand knight.

Copies are distributed as follows:

- The Original Copy is sent to the delinquent member.
- The Supreme Office Copy is forwarded to the Department of Membership Records. The Supreme Knight will mail a personal letter to the delinquent member. This letter will convey the Supreme Knight's interest in having the member retain his good standing status.
- The State Council Copy is mailed to your state deputy. He will write to the member, offering assistance and advising him that the district deputy in his area is available to help with any particular problems.
- The District Deputy Copy is sent to your district deputy. He will telephone the delinquent member to discuss the arrearage situation. In the course of the telephone visit, suggestions as to a possible solution will be recommended, and the district deputy will volunteer to assist the member, if a need exists. The district deputy will also determine whether personal contact has been made by the council. The response and reaction received from the delinquent member is recorded on the District Deputy Copy of the Notice of Intent to Suspend and then forwarded to the state deputy.
- The Council Copy is retained for council files.

If the delinquent member does not meet his obligation or arrange a satisfactory payment schedule **within 60 days following processing of the Notice of Intent to Suspend**, the council may file a **Form 100 Membership Document, indicating suspension.** However, the suspension will not be processed at the Supreme Council office unless a Notice of Intent to Suspend has been on file for the required 60 days.

The Notice of Intent to Suspend becomes **null and void 90 days following the date it is recorded at the**

Supreme Council office. After the 90-day period has elapsed, the form will be removed from the file under the assumption the council has been successful in retaining the member.

If, subsequently, the member on whom the council previously filed a Notice of Intent to Suspend should again become delinquent, the entire billing/retention process must be re-implemented as described herein.

KEEP ACCOUNTS

Be the accountant of his council, keeping said accounts so that they show the complete and accurate financial standing of the council and its members at all times by utilizing such systems and records as are required by the Laws and Rules and furnished by the Supreme Council at the expense of the subordinate council.

PAY MONEYS TO TREASURER

Pay over to the treasurer of his council all moneys received at meetings or between meetings for fines, dues, contributions, initiation fees or from other sources, for which said treasurer shall issue a receipt to such financial secretary, specifying the funds to which the same shall be credited, which receipt shall be given to the grand knight by the financial secretary before the next succeeding meeting.

KEEP ROLL

Keep a roll of the members, their ages, residences and occupations, with the dates of initiation. Keep a record of Fourth Degree members when furnished by the master of the Fourth Degree and comptroller.

CAUSE MEMBERS TO SUBSCRIBE TO BY-LAWS, ETC.

Cause every member before initiation to subscribe his name, subjecting himself to the Constitution and By-laws of the Order and of the council.

NOTIFY SUPREME SECRETARY OF ELECTIONS

Notify the Supreme Secretary of the names and addresses of all council officers using Report of Officers Form 185 or electronic equivalent.

KEEP CERTAIN RECORDS

Keep a record of the financial and business transactions of his council using systems and records approved by the Board of Directors and furnished by the Supreme Council at the expense of the council, to wit: the number of propositions received and the names of the candidates, the number elected and their names, the number initiated and their names; the amount of money received and from what sources, the amount paid to the treasurer and for what purpose, the amount of all orders drawn against the treasurer, stating to whom paid and for what purpose.

DRAW ORDERS

Draw all orders on the treasurer of his council when ordered by the Supreme Council, state council, his local council, board of trustees or grand knight for the payment of all claims or demands against his council, which orders shall be signed by him and countersigned by the grand knight.

NOTIFY SUPREME SECRETARY OF MEMBERSHIP TRANSACTIONS

Notify the Supreme Secretary promptly of members initiated, suspended, expelled, deceased, readmitted, transferred into the council, etc., on the Form 100 Membership Document. Data changes can be reported on the Form 100 or by other acceptable means.

NOTIFY CANDIDATE'S GRAND KNIGHT

When a candidate receives degrees in a council of which he is not a member, the financial secretary thereof shall notify the grand knight of said candidate's council.

MAINTAIN COUNCIL SEAL

Keep the seal of the council and affix the same to all proper papers, etc.

NOTIFY COMPTROLLER

Notify the comptroller of the assembly of all Fourth Degree member transfers into or out of the council, suspensions and deaths.

OTHER DUTIES

Perform all other acts required by the Laws of his council and the Order and the Rules of the Board of Directors.

ACCOUNTING SYSTEMS

The electronic accounting system—Member Billing—is designed for use by local councils and assemblies. It is the only accounting system being supported by the Supreme Council office. Manual systems and FSPC are no longer supported, though they can still be used as long as supplies of supporting forms remain available in the Supply Department. Councils/assemblies that have not already done so should transition to Member Management/Member Billing as soon as practical to avoid losing support at an inopportune time.

MM/MB resides on the Order's website at *kofc.org* in the secure Officers Online area and allows councils/assemblies to: manage the financial transactions for their unit; create, edit and archive receipts, vouchers, assessments and adjustments; maintain a list of accounts and sub-accounts, payee/payor lists and council/assembly defined sub-classes for billing (military, students, etc.);

produce billing notices and payments received from members.

To use this online system, you must have received a personal invitation code and be registered at *kofc.org* to gain access to the Reports Online/Member Management/Member Billing portions of the website.

ACCOUNTING SYSTEM CHECKS AND BALANCES

Regardless of the accounting system used by the council, the Laws and Rules provide for the financial secretary to receive all moneys and for the treasurer to disburse all council funds. For this reason the **financial secretary cannot be a signatory on council checks and accounts**. Doing so would violate the Laws by allowing the financial secretary to participate in the disbursement process.

ASSISTANCE TO INSURANCE MEMBERS

A financial secretary is occasionally called upon to assist members with insurance matters. The financial secretary is expected to give as much assistance as possible.

Often, the information sought by the insurance member is not available to the financial secretary. It would be to his advantage and to that of the insurance member to take one of the following steps after first determining the information sought:

- Advise the insurance representative that a particular member desires assistance, providing the representative with all possible details including the member's address and telephone number.
- On behalf of the insured, write to the Supreme Secretary for the information requested.
- Refer to pages 57-58 and 95-97 for additional information on the Order's insurance program.

MEMBERSHIP ROSTERS

Council and assembly rosters are available on the Knights of Columbus website at *www.kofc.org*. Each registered officer in the council or assembly (see page 2) can access his roster listing by clicking on the Reports Online tab to view or print. These rosters are updated weekly. There are also "frozen" rosters dated January 1 and July 1, which are needed for conducting the audits.

Any council or assembly that is unable to generate a roster from the website should contact the district deputy or master for help in doing so. Should you be unsuccessful at that level, you can contact the Supreme Council Customer Service Department at *info@kofc.org* or the Department of Membership Records at *membership@kofc.org*.

Membership lists can also be generated by using the Data Download Tool in Member Management. The Data

Download Tool is located in the Print Center section of the Member Management application, located in the secure Officers Online area of *kofc.org*.

Regardless of the roster format being used, any discrepancies between local council records and the records of the Supreme Council office are to be reconciled. Please refer to page 42 under the heading "Schedule A – Membership" in the Audit section.

An asterisk (*) preceding an address on the roster indicates that mail sent to that address has been returned to the Supreme Council office by the Postal Service. It does not necessarily indicate a bad address. However, if the address is wrong, the corrected or new address should be reported on a Form 100 or other suitable medium as detailed on page 55 under the "Data Change" heading. If the address is correct, please notify the Department of Membership Records so that the restriction code (*) can be removed. Those members with restriction codes in their records do not receive COLUMBIA magazine or other fraternal mailings originating from New Haven.

SERVICE PROGRAM PERSONNEL REPORT

The Service Program Personnel Report Form 365, pictured on page 17, should be completed by the newly elected grand knight as soon as a majority of the council's Service Program personnel have been appointed for the fraternal year. Receipt of Form 365 at the Supreme Council office by August 1 is a requirement for the Star Council, Columbian, Founders' and Father McGivney Awards and comprises the mailing list of Service Program personnel for special programming materials, including *Knightline* and *PS*.

Form 365 can be found in the Council Report Forms Booklet (#1436) contained in the Surge . . . with Service kit that is forwarded in May to each financial secretary of record. (The financial secretary should review his copy of the Council Report Forms Booklet monthly and confer with the grand knight to verify that the appropriate reporting forms have been completed as required.) The original Form 365 should be forwarded to the Supreme Council office, with photocopies sent to the state deputy, district deputy, and a copy retained for the council files.

The preferred method of reporting Service Program personnel is through the Member Management application located in the secure Officers Online area at *www.kofc.org*. Simply follow the instructions included on the website. There is no need to file a paper report with the Supreme Council office after reporting personnel through the Member Management application.

You can also visit our website at *www.kofc.org* and complete the Service Program Personnel Report Form 365. Click on: For Officers, Forms, Council, 365. Please note, however, that this form must then be printed and mailed to the Supreme Council office. It cannot be submitted electronically. The information contained on the

form must also be reported to the state deputy and district deputy.

Any questions relating to the Service Program Personnel Report should be directed to the Supreme Council Department of Fraternal Services, see page 8.

CHARTER CONSTITUTION AND LAWS

The financial secretary should have on hand at all times a personal copy of the current *Charter Constitution and Laws of the Knights of Columbus* (Item #30). He should also have extra copies available for the grand knight, advocate and other interested officers or members and has the responsibility to distribute copies of the latest issue of the *Charter Constitution and Laws* to all First Degree initiates. Copies may be ordered from the Supreme Council Supply Department.

The council will benefit from a periodic review of the Laws governing councils, officers and members. These reviews may be made at meetings of officers under the direction of the grand knight or the advocate. These reviews are not requirements of the Laws, but are good practices to assure that all are acquainted with the requirements of their own duties in the council and of all other functions in the council.

REQUISITION FOR SUPPLIES

Financial secretaries should order supplies on a requisition Form #1 provided for that purpose. It is a five-copy form with one copy for the financial secretary. The other four copies, with the carbons remaining between the sheets, are to be forwarded to the Supply Department at the Supreme Council office. Please refer to page 15.

To avoid delays in receipt of your order, supply all required information including specific quantities. Using terms like “a few” or “a stack” impede processing. Allow three to four weeks for delivery. Rush orders require that the requisitioner supply a specific “needed by” date, not ambiguous terms like “as soon as possible.”

Chargeable items should be ordered only by the grand knight or financial secretary. If a council requests imprinted forms, a separate requisition should be completed, with imprint sample attached, and forwarded at least one month in advance. Promotional items must also be ordered on a separate requisition and forwarded — together with the proper payment — to the Supply Department.

The SUPPLY CATALOG (#1264), included in the Surge . . . with Service kit each year, contains individual items used by local councils, Fourth Degree assemblies and Columbian Squire circles. Additional copies of the catalog are available from the Supreme Council Supply Department.

FINANCIAL SECRETARY COMPENSATION

The Board of Directors has set the compensation to be paid to the financial secretary, and every council should have by-laws that conform exactly to this policy:

From the council. . . . an amount equal to not less than eight percent and not more than ten percent (to be determined by the council) of the moneys collected for dues from both insurance and associate members. The financial secretary is free to waive this compensation at his discretion.

Lump sum payments are not allowed as compensation to the financial secretary. The purpose of compensating on a percentage basis is to pay the financial secretary according to the effectiveness of his collecting from members all moneys due to the council. Such collection is the first duty of his office listed in Section 139 of the Laws. The financial secretary receives compensation from his council for dues collected only. He **does not** receive compensation for initiation fees or any other receipts.

From the Supreme Council office. . . . payable annually at the end of each calendar year, \$0.40 for each life insurance certificate registered to the council and in force at the end of the calendar year.

The payment from New Haven is made annually in January to the financial secretary of record on December 31. However, if more than one person served in the office during the year, it is expected that the financial secretary receiving the award will share it on a pro-rata basis with his predecessor.

The approved compensation is for performance of the regular duties of the office of the financial secretary according to the Laws of the Order. The council may award additional compensation to a financial secretary for extra duties which he performs at the council's direction beyond those required by the Laws.

MEMBERSHIP NUMBERS

Every member in the Order is assigned a permanent membership number. The number is indicated on the Council Statement following any transaction processing involving that member.

When submitting forms or letters to the Supreme Council office, the financial secretary should always use the number of the member involved. Failure to do so may cause delays in processing or in responding to inquiries. The importance of using the membership number cannot be overemphasized.

CONTACTING DEPARTMENTS

To address general issues, please contact the CUSTOMER SERVICE DEPARTMENT at:

Phone: (203) 752-4000

Toll free number: 1-800-380-9995

Email: *info@kofc.org*

If you have any technological questions regarding on-line applications, you should contact the home office Service Desk:

Phone: (203) 752-4242

Email: *helpdesk@kofc.org* (All inquiries sent via e-mail should start with the word “NEW” in the subject line.)

If you need a specific issue to be addressed, you should contact directly any of the departments listed below:

Mailing address for all departments except Supply:
1 Columbus Plaza, New Haven, CT 06510

AGENCY: Administrative support arm for agency field force — distributes field and general agent mail and status cards, verifies claims for agent’s health insurance. Any issues with insurance policies should be dealt with directly through your agent.

Email: *agency@kofc.org*

Phone: (203) 752-4252

Agent Locative Service: (203) 752-5046

CATHOLIC INFORMATION SERVICE: Publishes and distributes information on Catholicism, Catholic doctrine, and practice.

Email: *cis@kofc.org*

Phone: (203) 752-4574

CEREMONIALS: Exemplification observance of degrees to ensure proper rituals.

Email: *ceremonials@kofc.org*

Phone: (203) 752-4347

COLUMBIA MAGAZINE: Publishes international magazine containing information on the Church, volunteer efforts and issues most important to Knights and their families throughout the world.

Email: *columbia@kofc.org*

Phone: (203) 752-4398

COUNCIL ACCOUNTS/GENERAL OFFICE: Processes council payments for per capita, Catholic advertising, Culture of Life and supply charges. Distributes the monthly Council Statement. Responsible for scholarship programs.

Email: *council.accounts@kofc.org*

Phone: (203) 752-4739

FINANCIAL SECRETARY APPOINTMENTS: Responsible for the appointments, reappointments, and resignations of financial secretaries and the maintenance of their records and reports.

Email: *ann.moran@kofc.org*

Phone: (203) 752-4717

FRATERNAL SERVICES: Develops service-oriented and fraternal programs for implementation by state and local councils. Promotes the Columbian Squires.

Email: *fraternalservices@kofc.org*

Phone: (203) 752-4270

Fax: (203) 752-4108

MEMBERSHIP GROWTH: Promotes membership growth in local and state councils, the district and Orderwide. Promotes the development of councils including college and ethnic councils. Responsible for the following: membership promotion, new council development, millennial group, college councils, council reorganizations and reinstitutions, round tables, and VIP programs.

Phone: (203) 752-4473

Fax: (203) 752-4108

MEMBERSHIP RECORDS: Processes council, assembly, and circle transactions, including disability exemption. Maintains membership database. Processes address changes.

Email: *membership@kofc.org*

Phone: (203) 752-4210

Fax: (203) 752-4113 or (203) 562-7215

PAYMENT RECEIPTS: Processes insurance and loan billings and payments, reinstates policies, handles correspondence, dividend matters and policy audits.

Email: *payment.receipts@kofc.org*

Phone: (203) 752-4238

PRINTING PLANT/SUPPLY: Responsible for the Order’s printing and mailing needs. Handles supply requisitions for fraternal and insurance programs.

Email: *supply@kofc.org*

Phone: (203) 752-4244 (for print orders)

Phone: (203) 752-4214 (for supply orders)

Mail: 78 Meadow St, New Haven CT 06519

ISSUING COUNCIL CHECKS

When a council forwards a check to the Supreme Council office in payment of per capita, Catholic advertising, Culture of Life, or supplies, the check should be forwarded in the self-addressed envelope provided, together with the payment stub, which is located in the upper right-hand section of the Council Statement.

All checks must be made payable to “Knights of Columbus Supreme Council.” Do not make checks payable to any individual or place endorsements on the reverse side. Your check should include the following:

- Council number, name and address
- All required signatures
- Agreement between figures and written amount
- Bank code

Financial secretaries and other officers frequently write concerning council payments when a check is sent at the close of a month and credit is not shown on the next month's statement. The following explanation may be of help in this matter:

Preparations to produce Council Statements are initiated on the last working day of the previous month. Therefore, any payment not received and credited to your account prior to this time will not appear until the next statement is produced on the first of the following month. This creates a situation where your records and those of the Supreme Council office do not agree, and that payment will be a reconciling item. It is to be noted that the status of your council is determined by the information on **our** records at the time of preparation. For example, a check received after cut-off on January 31 would be credited to your account on February 1 and the activity would be shown on your March 1 statement.

INCOME TAX REQUIREMENTS

The annual grant from the Supreme Council to the financial secretary is subject to income tax. Accordingly, he is required to report the total amount received from the Supreme Council on his tax returns. In the United States, the Supreme Council will issue a Form 1099-MISC to each financial secretary whose grant exceeds \$599.99. For Canadian councils, a T4A slip will be issued if the grant exceeds \$499.99. The financial secretary must report the grant as income on his tax returns even if it falls below the threshold for issuance of a Form 1099 or a T4A tax slip. He must also report any annual compensation received from the local council on his income tax returns. The financial secretary is not treated as an employee of either the local council or the Supreme Council.

INSTITUTION OF PAYMENT

Relative to institution of payment of a council obligation, Section 139.8 instructs the financial secretary to draw all Orders on the Treasurer—voucher. The grand knight countersigns the completed document. This is the treasurer's authorization to draw the required check (Sections 140.3 and 4).

A Supreme or state council obligation does not require council approval, as outlined in Section 140.4. Receipt of the monthly Council Statement from Supreme is the official notice that the amount owed is due and payable. The same is true of a billing from the state council.

When the council approves any bill other than a Supreme or state council assessment, the bills must be turned over to the financial secretary. He then issues the Order on Treasurer—voucher.

SUSPENSION OF COUNCIL

The financial secretary should always be aware of the need to make payments to the Supreme Council within the time limits allowed under Section 156 of the Order's Laws.

Failure to make payments within the time limit will result in suspension of the council. When a council is suspended, the Board of Directors requires the Supreme Secretary to send a Notice of Suspension to the grand knight, with copies to the district deputy and state deputy.

Section 156 provides a grace period of 100 days for each levy from the first of the month in which the levy is made. The assessment dates and the dates on which they become in arrears are as follows:

Levy date	Type of levy	Pay by
January 1	Per Capita/ Catholic Adv.	April 10
July 1	Per Capita/ Catholic Adv.	October 10

Supplies — 40 days after the first of the month in which the charge appears on the monthly Council Statement.

The above information is of particular importance to the financial secretary and the grand knight. A council is suspended automatically whenever there is an arrearage of \$50.00 or more in any of the above accounts.

Even though the council has a 100-day grace period to remit and receive credit for payments, automatic notices to the grand knight, financial secretary and district deputy will be generated between 58 and 60 days from the date of assessment. This notice is a reminder to forward your payment in order to avoid automatic suspension. It is **not** the official Notice of Suspension.

A council may have its suspension lifted by merely making payment of the amount in arrears. When a council is to be reinstated, Notice of Reinstatement is sent to the aforementioned officers.

ORDER ON TREASURER

After a bill has been properly approved for payment, the financial secretary initiates issuance of a check by generating a voucher (Order on Treasurer) in Member Billing under the Voucher section of the Council Ledger. He then prints a Report of Vouchers for the grand knight's signature which authorizes the treasurer to issue the check. Instructions, specific recorded webinars and Help are available within the online applications.

Trustees, in conducting the semi-annual audit, should make certain that the stubs in the possession of the financial secretary and the vouchers held by the treasurer

agree. Also, the vouchers should be compared with the checks actually issued. Some treasurers, after receiving the cancelled checks from the bank, clip the vouchers and the checks together, thus facilitating the work of the trustees.

COUNCIL STATEMENT

Each financial secretary must have a complete understanding of the effect of reported membership transactions on per capita, Catholic advertising and Culture of Life levies and should also be familiar with charges accruing to the council from supply orders. The Council Statement, sent to financial secretaries monthly, provides that information. It reflects changes in membership and reports vital information on the council's financial obligations to Supreme. Please refer to pages 18 and 19.

Important points of information regarding the Council Statement. . .

- The Council Statement should be retained by the financial secretary as part of his permanent files. It should be reviewed by the grand knight and read at the next council meeting.
- The account balances — per capita, Catholic advertising, Culture of Life and supplies — should be treated as individual amounts owed by the council. Because of inactive insurance member credits, back-dated transaction credits and miscellaneous adjustments, credit balances often appear in columns 12 and 13 and in some instances result in an overall credit balance in the account. Please note that account balances also appear in the Retain for Council Records box located at the top of the statement. The amount due and payable by the council appears as the Total Due. Any credit balances on the New Balance line will not print in their respective fields in the box. Credit balances in columns 12 and 13 will automatically transfer between accounts to offset charges. Supply account credits, however, will not be transferred but will be used to offset future charges.
- The financial secretary institutes payment by issuing an Order on Treasurer—voucher, countersigned by the grand knight, along with the payment stub portion of the Council Statement. Use of the stub will help ensure that the payment is applied in accordance with council wishes. Failure to use the stub could result in the payment being applied incorrectly or credited to the wrong council.
- Section 156 of the Laws of the Order provides for suspension of any council for failure or refusal to pay assessments within the time specified. Per capita/Catholic advertising assessed January 1 and July 1 must be received and processed by April 10 and October 10, respectively. Supply charges are payable forty days after receipt of invoice.

- Credits for assessments may be applicable in the case of member suspension. The Supreme Council posts an effective date of suspension up to 130 days earlier than the calendar date on which it is actually processed in New Haven. Thus, if an assessment date (January 1 or July 1) is reached or passed, a credit of \$3.25 is issued to the council.
- If there are any items on the Council Statement about which you wish further information or that appear to be incorrect, you should contact the Supreme Secretary. Be certain to provide your complete address and telephone number including area code with your inquiry.

FINANCIAL TRANSACTION DESCRIPTIONS (COLUMNS 2 & 3)

Balance Forward	—Balances brought forward from the previous Council Statement
New Balance	—Balances of the council as of the date shown
Per Capita Tax	—Semiannual levy, January and July
Catholic Advertising Fund	—Semiannual levy, January and July
Culture of Life	—Semiannual levy, January and July
Payment	—Payment received from council
Supply Charge	—Supplies billed to council
Bonding Fee	—Charge for additional bonding ordered by the council
Adj.—Fund Transfer	—Transfer of credits or charges between accounts or councils
Adjustment—Office	—A reconciliation adjustment originated by the Supreme office
Returned Check	—Charge back of a check not honored for payment
Misc. Adjustment	—Misc. charge/credit resulting from membership activity
Inactive Credit	—Annual per capita credit allowed for each inactive insurance member
Dues Adjustment	—Form 142 Transfer Account Adjustment
Re-entry Adjustment	—Financial charge/credit for re-activation or readmission

MEMBERSHIP TRANSACTION DESCRIPTIONS
(COLUMN 3)

Associate to Ins	—Associate to Insurance
Disability Exempt	—Disability Exempt Status
Honorary Memb	—Honorary Membership
Honorary Life	—Honorary Life Membership
Ins to Associate	—Insurance to Associate
Juvenile to Adult	—Juvenile Insured Initiation
Member Adjustment	—Membership Adjustment
Member Death	—Member Death
New Member	—New Member Initiation
Notice of Intent	—Notice of Intent to Suspend processed
Reactivation	—Member Reactivation (inactive insurance only)
Readmission	—Member Readmission (3 months to 7 years)
Reapplication	—Membership Reapplication (over 7 years)
Reinstatement	—Membership Reinstatement (up to 3 months)
Suspension	—Suspension/nonpayment
Suspension/Board	—Suspension/Board action required for return
Transfer	—Member Transfer
Withdrawal	—Member Withdrawal

Councils are assessed \$1.75 for per capita tax and \$.50 for Catholic Advertising each January 1 and July 1 on the total membership in the council including inactive and honorary members. Honorary life and disabled members are excluded from the assessment. Concurrently, councils are also assessed \$1.00 for the Culture of Life fund. Honorary, honorary life, inactive and disabled members are excluded from the Culture of Life assessment. On occasion, the Board of Directors implements special assessments for financing various worthy projects and causes. Any such levies are additional.

Each month the grand knight receives his own Membership and Financial Statement (Form #1189). It is pictured on page 20. The report shows progress the council is making in its membership/insurance programs. The Financial Summary section indicates the council's financial standing in relation to the Supreme Council. This statement is a condensed version of the Council Statement received by the financial secretary.

In addition, the district deputy receives a monthly report (#F049) similar to the grand knight's except that it contains information on every council in his district. A District Deputy's Report is shown on page

21. If a council is not meeting its financial obligations, the district deputy is obligated to determine the reason and urge the financial secretary to initiate payment to avoid suspension.

**ANNUAL FEDERAL INFORMATION RETURN—
FORM 990**

All councils and assemblies in the United States are exempt from federal income tax under the Internal Revenue Code, Section 501(c)(8). A group ruling recognizing the exemption was obtained by the Supreme Council for itself and for its subordinate units. The group ruling does not extend to home corporations.

All councils/assemblies file one of the following:

- 990N – Gross receipts of \$50,000 or less (electronic format only, available at *www.irs.gov*).
- 990EZ – Gross receipts over \$50,000 and up to \$199,999.
- 990 – Gross receipts of \$200,000 and over.

The Supreme Council insists that each such subordinate unit carry out its responsibilities under this law. Form 990 must be filed by the fifteenth day of the fifth month after the end of your annual accounting period. **Failure to file three consecutive years will result in a loss of tax exemption status.**

In order to keep abreast of the current laws in these matters, the Supreme Advocate will send a memorandum to all U.S. councils and assemblies during the month of February of each year.

RECORDS RETENTION

On occasion, financial secretaries inquire as to how long council records should be retained. Be guided by the following:

- Current member Form 100s (new members, re-entry transactions for members who did not join through your council originally): **7 years**
- Current member Form 100s (all except above and data changes): **3 years**
- Current member Form 100s (data changes): **verify processing at the Supreme Council office, then destroy**
- Former member Form 100s (all transactions): **verify processing at the Supreme Council office, then destroy**
- Financial and business records (e.g., bank statements, contracts, purchase orders, invoices): **10 years**
- Tax forms: **7 years minimum, 10 years recommended**
- Correspondence: **3 years**

In all cases, tax ID numbers—including the last four digits—must be obliterated.



KNIGHTS OF COLUMBUS
IN SERVICE TO ONE. IN SERVICE TO ALL.

APPLICATION FOR APPOINTMENT AS FINANCIAL SECRETARY

Please Do Not Write Here

Please return completed form promptly to: **Carl A. Anderson, Supreme Knight**
Knights of Columbus
Attn: Financial Secretary Department
1 Columbus Plaza
New Haven, Connecticut 06510-3326 U.S.A.

WORTHY SUPREME KNIGHT:

I apply for appointment as Financial Secretary of my council, Number 18000 in NEW HAVEN CT
State or Province

Social Security Number 022-24-3434 Membership No. 6987675
(Required for compensation payment)

Name (Print) JAMES P. HARLOW Address 14 WINDSOR STREET

City/Town, State/Province, Zip Code BRIDGEPORT, CT 06765-2476

My area code and phone numbers: Residence: (203) 656-9916 Business: (203) 638-6723

E-mail address james.harlow@gmail.com

1. I am on Supreme Office records as a member of Council Number 18000
(Officers must be recorded members of the council in which they hold office.)

2. I am in good standing. Write YES here YES or explain
(Good standing means all council and other charges paid to end of past quarter year.)

3. I am a Third Degree member. Write YES here YES or explain
(Section 92 of the Laws requires officers to be in Third Degree, but permits officers of a new council to be in First Degree temporarily. If you are not in Third Degree today, explain above.)

4. I was born 05/30/50 My educational background is UNIVERSITY OF NEW HAVEN
Month - Day - Year

5. I have served in the following offices of our Order:			
(Office)	(No. of Yrs)	(Office)	(No. of Yrs)
<u>GRAND KNIGHT</u>	<u>2</u>	<u>WARDEN</u>	<u>1</u>
<u>DEPUTY GRAND KNIGHT</u>	<u>2</u>	<u>OUTSIDE GUARD</u>	<u>1</u>

6. I now hold the COUNCIL OFFICE of NO CURRENT OFFICE from which I hereby resign immediately if appointed Financial Secretary by the Supreme Knight.

7. My present major gainful occupation is (Title or duties) REAL ESTATE AGENT
for (Name and address of employer) HARLOW REAL ESTATE AGENCY INC.

8. *I am not engaged in any way in the sale of personal accident, sickness, hospitalization, disability income or life insurance. If I become so engaged while Financial Secretary, I will inform the Supreme Knight immediately. (A member so engaged is not appointed or retained as Financial Secretary.)
*Statement 8 does not apply in Cuba, Guatemala, Panama, Canal Zone, Virgin Islands, Poland and Philippines.

9. I have had the following training or experience in accounting or bookkeeping:
EXPERIENCED IN ALL PHASES OF ACCOUNTING

10. I have had these other experiences which might also help as Financial Secretary:
DESIGNED ACCOUNTING SYSTEM FOR REALTORS ASSOCIATION.

11. If appointed Financial Secretary, I agree without reservation to fulfill all duties of that office in accordance with the laws of the Order.

12. I understand that in my role as financial secretary I may obtain member's personal information which I pledge to maintain as confidential and only use for the business of the Order.

13. I understand that if appointed Financial Secretary such appointment shall be for a period of three years with my performance in office subject to review before reappointment shall be made.

Applicant's Signature James P. Harlow Date 5/30/09

IMPORTANT: Have you entered your Council Number in first line above?
Delay in return of this completed form will delay appointment.



KNIGHTS OF COLUMBUS
IN SERVICE TO ONE. IN SERVICE TO ALL.

NOMINATION FOR APPOINTMENT AS FINANCIAL SECRETARY

NOTE: The Financial Secretary:

1. Shall be a Third Degree Member;
2. Shall be appointed by the Supreme Knight, for a (three-year term with performance subject to review before reappointment
3. Shall be at least 21 years of age;
4. Shall not be engaged in the sale of life or health insurance
5. Shall not hold another officer position within the council.
6. Shall not have a criminal record.

Please return completed form promptly to:
Carl A. Anderson, Supreme Knight
Knights of Columbus
Attn: Financial Secretary Department
1 Columbus Plaza
New Haven, Connecticut 06510-3326 U.S.A.

WORTHY SUPREME KNIGHT:

I submit the following member(s) for your consideration in appointing the Financial Secretary of

Council No. 18000 located at NEW HAVEN CT
City/Town State/Province

MEMBER NOMINATED

(Print)

JAMES P. HARLOW MAIL ADDRESS 14 WINDSOR STREET
Full Name Street

BRIDGEPORT CT 06765-2764
City State Zip

IS HE IN GOOD STANDING IN COUNCIL?	IS HE NOW THIRD DEGREE MEMBER? **	WAS HE EVER ES., TREAS, OR K.C. INS. AGT? #	DOES HE SELL LIFE OR HEALTH INSURANCE?
Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Dues paid to: <u>12/31/09</u> DATE	If NO when will he receive Third Degree? _____ DATE	#If YES, what office did he hold? <u>TREASURER</u> OFFICE	

NOTE: Question 4 does not apply in Cuba, Panama, Canal Zone, Philippines, Virgin Islands, Poland or Guatemala.

Date 6/12/09 Signed James C. Scott Grand Knight { Elected
Re-elected
Address 14 GRASSY LANE City/Town MILFORD
Zip Code 06619 State/Province CT E-mail Address James.Scott@aol.com

WE, THE COUNCIL BOARD OF TRUSTEES, CONCUR WITH THE NOMINATION OF THE GRAND KNIGHT:

Signed Thomas E. Nicera
Signed Thomas J. Henry
Signed James E. Matthews

SIGNATURES OF TRUSTEES ARE REQUIRED.

HAVE YOU ENTERED YOUR COUNCIL NUMBER ON THE LINE ABOVE?



KNIGHTS OF COLUMBUS
IN SERVICE TO ONE. IN SERVICE TO ALL.

EVALUATION OF FINANCIAL SECRETARY

WHEN A KNIGHT ACTS SELFLESSLY, HE ACTS ON BEHALF OF THE WORLD.

Carl A. Anderson, Supreme Knight
Knights of Columbus
Attn: Financial Secretary Department
1 Columbus Plaza
New Haven, Connecticut 06510-3326 U.S.A.

Worthy Supreme Knight,
The following evaluation of Financial Secretary JAMES P. HARLOW is hereby submitted:
(Place check (✓) in appropriate box)
The Financial Secretary's current major occupation is: REAL ESTATE AGENT

	Excellent	Good	Fair	Poor
1. Bills members on time and in the proper manner. Mails membership cards promptly. Follows procedures for NOTICE OF INTENT TO SUSPEND.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Attends regular meetings, special meetings and First Degrees.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. All books and records available and in good condition for semi-annual audits by trustees. Available to answer questions during audit.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Promptly mails all required forms (membership documents, Officers Report, Fraternal Survey, etc) to proper persons.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Cooperates fully with all council officers and chairmen.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Promptly draws orders on the treasurer for payment of bills levied against the council. Turns all funds collected over to the treasurer for deposit.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Complies with all confidentiality and data management requirements of Supreme Council.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Reviews monthly council statements and semi-annual membership rosters with the council and grand knight.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Rating of his overall attitude and efficiency.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The reappointment of Brother HARLOW is hereby recommended (Check one)
(If not recommended please provide reasons with this form.) not recommended

Thomas J. Henning
Trustee

Thomas E. Nicora
Trustee

James E. Matthews
Trustee

James C. [Signature]
Grand Knight

Date: OCTOBER 26, 2008

Timothy W. Jones
District Deputy

Council No. 18000 Location NEW HAVEN
City

CT
State/Province

THIS SECTION TO BE COMPLETED BY THE STATE DEPUTY

The above evaluation of the Financial Secretary of this Council is hereby noted. I am forwarding the recommendation of the Grand Knight, Trustees and District Deputy for your decision.

Dated: 10/28/08 State Deputy J. James Anderson



SERVICE PROGRAM PERSONNEL REPORT

Due By:
AUGUST 1

For Supreme Office Use Only

Rec'd _____

Form (#365) should be completed and forwarded to the Supreme Council Department of Fraternal Services as soon as a majority of your council's Service Program personnel have been appointed. Please understand that it is not necessary for your council to appoint members to fill all of the positions listed below. Because of local circumstances, a council may wish to only appoint the seven directors and perhaps a few chairmen to conduct those programs needed in your area. When and if additional chairmen are appointed, they should be reported promptly to the Department of Fraternal Services.

Please print or type names and membership numbers for those directors and/or chairmen appointed for your council. Failure to include membership numbers will only delay the processing and receipt of special program materials which include **PROGRAM SUPPLEMENT**.

The Service Program Personnel Reporting Form (#365) must be received at the Supreme Council office by **August 1**, in order to attain the first requirement for the **Star Council, Columbian, Father McGivney and Founders' Awards**.

If there are additions or deletions to your listing of Service Program personnel during the fraternal year, please notify the Supreme Council Department of Fraternal Services immediately at: 1 Columbus Plaza, New Haven, CT 06510-3326.

Date July 15, 1997 Council No. 18000

City New Haven State or Province CT

	MEMBERSHIP NUMBER	<input checked="" type="checkbox"/> Rev. <input type="checkbox"/> Rt. Rev. <input type="checkbox"/> Most Rev.	LAST NAME	FIRST NAME	INITIAL
(A) CHAPLAIN:	8 9 7 6 6 6 5		Sanders	Thomas	E
	(203) 697-1119		17 Fifth St New Haven	CT	06699
(B) PROGRAM DIRECTOR:	7 8 6 5 9 3 7		Boneo	Harold	J
	(203) 798-1652		14 First St New Haven	CT	07777
(C) CHURCH DIRECTOR:	8 7 6 7 7 8 7		Ingals	Edward	J
	(203) 897-1796		6 Jones St East Haven	CT	08976
(D) VOCATIONS CHAIRMAN:	9 8 7 9 9 6 5		Ingals	Frank	L
	(203) 896-5657		14 Wonders Ct Hamden	CT	06915
(E) COMMUNITY DIRECTOR:	8 9 7 6 5 9 9		Patterson	Harold	F
	(203) 657-9653		19 Harts Ct Wilton	CT	06619
(F) PRO-LIFE CHAIR COUPLE (Husband and Wife):	7 2 9 6 5 4 6		Patterson	Thomas	Helen
	(203) 657-7761		27 Harts Ct Wilton	CT	06619
(G) HEALTH SERVICES:	8 8 9 6 5 5 6		Scott	William	J
	(203) 786-9723		19 Wilson St West Haven	CT	07965

MAIL ORIGINAL TO: Supreme Council Department of Fraternal Services
MAIL COPIES TO: State Deputy, District Deputy, Council File

(Continued On Reverse)



KNIGHTS OF COLUMBUS

COUNCIL STATEMENT

DATE	ST COUNCIL	LOCATION

NUMBER	NAME	TRANSACTION DESCRIPTION	EFFECTIVE DATE	MEMBERSHIP BY CATEGORY			INCLUDED IN TOTAL				ACCOUNT BALANCES		
				ASSOC	INS	INACT	TOTAL	HON	HL	DIS	PER CAPITA	CATH ADV / CULTURE OF LIFE	SUPPLIES
				5	6	7	8	9	10	11	12	13	14
1	2	3	4										

INSTRUCTIONS TO FINANCIAL SECRETARY

1. This Council Statement should be retained by the financial secretary as part of his permanent files. It should be shown to the grand knight when received and read at the next meeting.
2. The account balances are listed in their respective categories on the Council Statement, columns 12, 13 & 14. The total amount payable is shown in the Total column of the Summary Financial Information section on the Summary and Payment Coupon page. Credit balances in the Per Capita, Catholic Advertising and Culture of Life accounts automatically transfer between accounts but do not transfer to the Supply account.
3. The financial secretary institutes payment by issuing an Order on Treasurer (# 157) which must be countersigned by the grand knight.
4. Section 156 of the Laws of the Order provides for suspension of any council for failure to pay assessments within the time specified. Per Capita, Catholic Advertising and Culture of Life assessed January 1 and July 1 must be received and processed by April 10 and October 10, respectively. Supply charges are payable upon receipt of merchandise.
5. If there are any items on this Council Statement about which you wish further information or which appear to be incorrect, you should direct an inquiry to the telephone numbers on the front of this page.

**FINANCIAL TRANSACTION DESCRIPTIONS
(COLUMNS 2 & 3)**

Balance Forward	- Balances brought forward from the previous Council Statement
New Balance	- Balances of the council as of the date shown
Per Capita Tax	- Semiannual levy, January and July
Catholic Advertising Fund	- Semiannual levy, January and July
Culture of Life	- Semiannual levy, January and July
Payment	- Payment received from council
Supply Charge	- Supplies billed to council
Bonding Fee	- Charge for additional bonding ordered by the council
Adj. Fund Transfer	- Transfer of credits or charges between accounts or councils
Adjustment - Office	- A reconciliation adjustment originated by the Supreme office
Returned Check	- Charge back of a check not honored for payment
Misc. Adjustment	- Misc. charge/credit resulting from membership activity
(inactive Credit	- Annual per capita credit allowed for each inactive insurance member
Dues Adjustment	- Form 142 Transfer Account Adjustment
Re-entry Adjustment	- Financial charge/credit for reactivation or readmission

**MEMBERSHIP TRANSACTION DESCRIPTIONS
(COLUMN 3)**

Associate to Ins	- Associate to Insurance
Disability Exempt	- Disability Exempt Status
Honorary Memb	- Honorary Membership
Honorary Life	- Honorary Life Membership
Ins to Associate	- Insurance to Associate
Juvenile to Adult	- Juvenile Insured Initiation
Member Adjustment	- Membership Adjustment
Member Death	- Member Death
New Member	- New Member Initiation
Notice of Intent	- Notice of Intent to Suspend processed
Reactivation	- Member Reactivation (inactive insurance only)
Readmission	- Member Readmission (3 months to 7 years)
Reapplication	- Membership Reapplication (over 7 years)
Reinstatement	- Membership Reinstatement (up to 3 months)
Suspension	- Suspension/nonpayment
Suspension/Board	- Suspension/Board action required for return
Transfer	- Member Transfer
Withdrawal	- Member Withdrawal



KNIGHTS OF COLUMBUS

1 Columbus Plaza New Haven CT 06510-3326 (203) 772-2130

Grand Knight's Membership & Financial Statement

JAMES C SCOTT
14 GRASSY LN
MILFORD CT 06619-0701

Date: 07/01/1997

Council Number: 18000

COUNCIL STATUS: IN GOOD STANDING

Annual Awards	Membership Quota : (5)			Insurance Quota : (3)		
	Additions	Deductions	Net	Additions	Deductions	Net
Month End	2	0	2	2	1	1
Year-to-Date	13	7	6	4	2	2
Percentage of Quota Attained: 120 %			Percentage of Quota Attained: 66 %			

Membership Summary	TOTAL	Insurance	Associates	Included in TOTAL are:			
				Inactive	Honorary	Honorary Life	Disability
Month End	97	55	42	1	3	2	1
Year-to-Date Change	6	5	1				

Financial Summary	Per Capita	Catholic Advertising	Supplies
Beginning Balance:	0.00	36.00	0.00
Payments & Credits:	0.00	36.00	0.00
Charges & Debits:	164.50	0.00	25.25
Ending Balance:	164.50	0.00	25.25
Total Amount Due (All accounts): \$ 189.75		Date of Last Payment: 06/14/1997	

The statistics printed above reflect membership and financial activity processed for your council during the month just completed and for the fraternal year that commenced on July 1. This report summarizes the information furnished to your council's financial secretary on the monthly Council Statement.

The figures provided under the Annual Awards section reflect gains/losses for both the current month and year-to-date as they relate to the Father McGivney, Founders' and Star Council Awards. For specific information regarding calculation of quotas and which transactions are credited or deducted, refer to the awards section of the "Surge..with Service" program manual (#962) and the Grand Knight's Handbook (#915).

The statistics listed in the Membership Summary section represent actual council membership counts and year-to-date changes. They are intended to provide insight into the overall growth of your council.

The information supplied under the Financial Summary section reflects financial activity in your council's per capita, Catholic advertising and supply accounts at the Supreme Council office. The total amount due is the outstanding balance for all accounts as of the statement date.

For further information regarding the annual awards program, please contact the Department of Fraternal Services. Inquiries regarding the processing of membership transactions should be made directly to the Department of Membership Records. Financial transaction questions should be directed to the Council Accounts Department.



DISTRICT DEPUTY'S REPORT

DISTRICT
032

STATE
CONNECTICUT

DATE
07/01/1997

TIMOTHY W LYONS
4973 WAYWARD AVE
WALLINGFORD CT 06942-1722

COUNCIL	18000	QUOTA	CURRENT MONTH			YEAR TO DATE			FINANCIAL STATEMENT	
			ADDITIONS	DEDUCTIONS	NET	ADDITIONS	DEDUCTIONS	NET		
MEMBERSHIP		5	2	0	2	13	7	6	PREVIOUS BALANCE	\$ 36.00
INSURANCE		3	2	1	1	4	2	2	CHARGES-PER CAPITA	164.50
			MEMBERSHIP FOR COUNCIL AS OF			LAST CASH PAYMENT RECEIVED			CATH ADV	0.00
			07/01/1997 97			06/97			SUPPLIES	25.25
			STATUS: IN GOOD STANDING						MISC CHARGES	36.00
			LESS CREDITS-CASH						MISC.	
			CURRENT BALANCE							189.75
MEMBERSHIP		13	3	1	2	19	4	15	PREVIOUS BALANCE	\$ 12.32
INSURANCE		7	5	1	4	9	2	7	CHARGES-PER CAPITA	446.25
			MEMBERSHIP FOR COUNCIL AS OF			LAST CASH PAYMENT RECEIVED			CATH ADV	.40
			07/01/1997 261			05/97			SUPPLIES	0.00
			STATUS: IN GOOD STANDING						MISC CHARGES	
			LESS CREDITS-CASH						MISC.	
			CURRENT BALANCE							446.65
MEMBERSHIP		5	2	0	2	5	1	4	PREVIOUS BALANCE	\$ 9.00CR
INSURANCE		3	2	0	2	6	2	4	CHARGES-PER CAPITA	91.00
			MEMBERSHIP FOR COUNCIL AS OF			LAST CASH PAYMENT RECEIVED			CATH ADV	.80CR
			07/01/1997 54			04/97			SUPPLIES	0.00
			STATUS: IN GOOD STANDING						MISC CHARGES	
			LESS CREDITS-CASH						MISC.	
			CURRENT BALANCE							81.20
MEMBERSHIP		6	2	1	1	11	4	7	PREVIOUS BALANCE	\$ 0.00
INSURANCE		3	0	0	0	4	1	3	CHARGES-PER CAPITA	201.25
			MEMBERSHIP FOR COUNCIL AS OF			LAST CASH PAYMENT RECEIVED			CATH ADV	0.00
			07/01/1997 122			06/97			SUPPLIES	0.00
			STATUS: IN GOOD STANDING						MISC CHARGES	
			LESS CREDITS-CASH						MISC.	
			CURRENT BALANCE							201.25
MEMBERSHIP		9	4	5	1-	8	6	2	PREVIOUS BALANCE	\$ 625.57
INSURANCE		5	0	1	1-	4	1	3	CHARGES-PER CAPITA	288.75
			MEMBERSHIP FOR COUNCIL AS OF			LAST CASH PAYMENT RECEIVED			CATH ADV	0.00
			07/01/1997 180			02/97			SUPPLIES	0.00
			STATUS: PENDING SUSPENSION			04/01/1997			MISC CHARGES	
			CURRENT BALANCE						MISC.	
										914.32
DISTRICT TOTALS										
	QUOTA	CURRENT MONTH			YEAR TO DATE					
MEMBERSHIP	27	ADDITIONS	DEDUCTIONS	NET	ADDITIONS	DEDUCTIONS	NET			
INSURANCE	15	9	2	7	27	8	19			
		MEMBERSHIP FOR DISTRICT AS OF		PERCENTAGE OF QUOTA FOR DISTRICT						
		07/01/1997 714		MEMBERSHIP		126 %				
				INSURANCE		127 %				

ACCOUNTING

ACCOUNT KEEPING . . .

The duties of the financial secretary as set forth in Section 139 of the Laws of the Order stipulate that the financial secretary shall collect and receive all moneys accruing to the council from members and other sources, that he shall keep an account of the indebtedness of each member of the council and the amount received from each member, and that he shall pay over to the treasurer of his council all moneys received by him from all sources. To assist him in complying with these duties, the Supreme Council has developed and makes available for local council use a computer-based system of record and account keeping.

. . . USING THE MEMBER BILLING APPLICATION

The Member Billing application — located in Officers Online, the secure area at *kofc.org* — works in conjunction with the Member Management application to allow councils to: manage the financial transactions for their council; create, edit and archive receipts, vouchers, assessments and adjustments; maintain a list of accounts and sub-accounts, payee/payor lists and council-defined sub-classes for billing (military, students, etc.); as well as produce billing notices and payments received from members.

INITIAL SET-UP FOR FIRST TIME USERS

If you are just starting to use Member Billing, there are a few steps that are required prior to generating an assessment.

Setting up the council's general billing information located in the Billing Information section:

- **Billing Information** – The billing frequency needs to be established. Member Billing allows you to assess dues to members annually or semi-annually only. If your council has quarterly payors, you can inform them that they can continue to pay quarterly but will be billed annually or semiannually, as is the council preference.

Additionally, the billing schedule must be selected as calendar or fraternal year. Also, the billing remittance address needs to be selected – either the council's mailing address or meeting address, or the financial secretary's mailing address.

- **Class List** – This screen is where the amount of the council's dues can be entered. Note that the amount of annual dues for honorary members is based on the sum of state and Supreme Council per capita taxes and other levies. The annual dues for honorary life members is specified in the *Charter Constitution and Laws* and cannot be updated in Member Billing.

Sub Class – Council-defined sub classes can be created for members for which the council wishes to reduce the dues amount. For example: a council waives or reduces dues for students. A sub class of students can be added, along with the annual rate of the reduced dues. Once established, members associated with a sub class will need to be assigned to the sub class on the member's Billing Information screen, located under the Member Information section.

- **Reason for Assessments** – This is required if the council plans to assess members any special or miscellaneous assessments. Reason for Assessments can be added on the Event/Assessments screen under the council's Billing Information section.

Setting up the member's billing information located in the Member Information section (Illustration # 1, page 28):

- **Member Class** – Displays the member as a regular, honorary, or honorary life member.
- **Sub Class** – Members may be assigned as part of a sub class and eligible for reduced dues (military, students, etc.)
- **Disability** – Members that are on disability and noted "Yes" on the Member's Billing Information screen will not be assessed dues. Nothing else is required to ensure that they are not assessed.
- **Do Not Assess** – This provides the ability to not assess dues for members who may have a special circumstance, such as financial hardship, where the council decides not to assess dues for a particular period. Note that honorary life or disabled members are not included in the dues assessment process, so this option does not need to be selected for these members.
- **Do Not Send Bill** – This provides the option of not sending a billing notice to specified members for any reason. Note that the member will still be assessed, but a notice will not be generated.
- **Delivery Preference** – This identifies the preferred method by which the member wishes to receive his billing notice – mail, email or both.
- **Billing Address Information** – This section allows the financial secretary to update a member's contact information including: address, phone number, fax number and email address. These changes will also be made in Member Management as well as alert Membership Records at the Supreme Council office.

Prior to generating the initial dues assessment, if there are members with an outstanding balance for previous

billing periods, these member records should be updated in the Member Ledger:

- **Billing Status** – When a dues assessment is processed from the Pending Assessment screen, the billing status for all members receiving this assessment will be changed to First Notice. Note that honorary life members do not receive an assessment, and their billing status can be manually updated to Dues are Current. Additionally, former members that are listed in Member Management/Member Billing can be manually changed to Prior or Deceased status (Illustration #2, page 29).
- **Adjustments** – The Adjustment section on the bottom of the Member Ledger screen can be used to generate a charge adjustment for members with an outstanding balance (Illustration # 3, page 30). Separate adjustments should be added if a member owes money for dues and other assessments (i.e., dues, special, etc.). If a member has paid dues or other assessments for future periods, a credit adjustment should be added. Payment of dues should not be recorded here, but through the Dues Collection Tool found under the Receipts section of the Council Ledger.

Note: This is the same process as assessing new members for dues or initiation fees after they have been recorded at the Supreme Council office and added to Member Management/Member Billing.

BILLING MEMBERS

A dues assessment can be generated for all billable members on the Enter Dues Assessment screen by clicking on Assessments under the Council Ledger section (Illustration # 4, page 31):

- **Billing Cycle** – Dues can be billed for the calendar year (Jan to Dec) or the fraternal year (Jul to Jun). Note that the default for the billing period is predetermined by the billing frequency, which is selected in the Billing Setup section.
- **As of Date** – All bills have a date that indicates how much is owed at the time the dues were assessed. Dues can be assessed in Member Billing as early as 90 days prior to the billing period. However, the As of Date cannot be set more than 15 days prior to the billing period. We suggest that the date used for the As of Date when generating a dues assessment also be used for special or miscellaneous assessments.
- **Assess Dues button** – This will place the dues assessment in a pending status, which can be processed on the Pending Assessments screen. All special or miscellaneous assessments should be

assessed on the Assess Other screen before processing the dues assessment.

A special or miscellaneous assessment can be generated for selected members using the Assess Other screen under Assessments in the Council Ledger section .

- **Charge to** – This specifies who will be assessed the additional charge and is selected by member type. Note that All Billable will assess all regular & honorary members; All Members will assess all regular, honorary & honorary life members; Honorary will assess only honorary members; and Honorary Life will assess only honorary life members.
- **Voluntary or Mandatory** – If an assessment is a voluntary assessment, a notation will display on the member's bill that this assessment is voluntary and payment is optional. Additionally, voluntary assessments require a valid Through Date. We suggest that the Through Date selected be well in advance of the last day of the billing cycle. (For example, if using an annual calendar year billing cycle, select a date like September 1 — well in advance of December 31.) After this date you have the ability to generate a credit transaction for all members that did not pay the voluntary assessment. Mandatory assessments will remain on the Member Ledger until the member pays this assessment or the transaction is voided on the Member Ledger.
- **Reason for Assessment** – This is a required field, and if the reason for assessment does not appear in the drop down list, it can be added on the Event/Reason screen under the Billing Information section.

Note: There is a link to this section on the bottom of the Assess Other screen.

- **Assess Other button** – This will place any special and miscellaneous assessments in a pending status, which can be processed on the Pending Assessments screen. All special or miscellaneous assessments should be assessed on the Assess Other screen before processing the dues assessment.

All pending assessments can be posted to the Member Ledger from the Pending Assessment screen. Note that if a dues assessment is included when the Process Assessment button is clicked on the Pending Assessment screen, the billing status for all members assessed will change to First Notice.

GENERATING NOTICES

- Once the pending assessments are processed, the First Notice can be generated from the Notices section of the Print Center in Member Billing (Illustration #5, page 32).

Note: If the grand knight's or trustees' names or telephone numbers do not display on the notice, the data can be added on the Council Officers—Current Year or member's General Information screens in Member Management.

Notices can be sent via email, or printed and mailed. There is also an option to generate a file copy of all notices to members, regardless of the delivery preference.

Member Billing also provides the ability to email an individual member a notice, once the member has been added to Member Management/Member Billing. Once the member delivery preference is set to email or both, an email notice icon will appear on the Member Ledger or Billing Information screens.

- After 30 days, you can update all members currently in First Notice status to Second Notice by using the Update Status screen under the Assessment section of the Council Ledger (Illustration # 6, page 33). Notices can be sent via email, printed and mailed or saved electronically by selecting a delivery preference in the Billing section.
- After 30 days, you can update all members currently in Second Notice status to Knight Alert by using the Update Status screen under the Assessment section of the Council Ledger (Illustration # 6). A letter is sent to the member explaining how his membership is in danger of being forfeited as a result of unpaid dues. The notices cannot be sent electronically because they require the signature of the grand knight and trustees.
- Sixty days after initiating the billing process, you can update all members currently in Knight Alert status to Intent to Suspend by using the Update Status screen under the Assessment section of the Council Ledger (Illustration # 6). A notice can be generated in the Billing section of the Print Center, informing the member that his delinquency has put his good standing status in jeopardy. Copies of this letter must be printed and sent to the Supreme Council office, the state deputy and the district deputy.

Note: Individuals who have been assessed for the current billing period, but have become former members, will need to have any outstanding balances and their billing status manually updated on their Member Ledger screens. If the billing status has not been updated, these members will continue to appear when the next notice is generated.

GENERATING MEMBERSHIP CARDS

Membership cards can be generated for members using the Membership Card section of the Print Center in Member Billing. We suggest printing membership cards

using the By Member Type feature, thereby having these cards ready for presentation when the member submits his payment for dues.

Membership Card stock paper (#4817) for Member Billing can be ordered from the Supreme Council Supply Department. (Note that cards come 8 to a sheet with 25 sheets to a package for a total of 200 cards.)

There are three options in Member Billing for printing membership cards:

- By member type, which can be classified as: All Billable, All Members, Regular, Honorary, Honorary Life or Members on Disability.
- By all members whose dues became current between specified dates.
- By using the Membership Card Template for a small group of members or for new members who have not been added to Member Billing.

PROCESSING PAYMENTS FROM MEMBERS

Under the Receipt section of the Council Ledger, there is a Dues Collection Tool, which will assist in recording members' payments. The Dues Collection Tool can be used if the member pays his outstanding balance in full (Illustration # 7, page 34).

If a member does not pay the full amount or includes a donation to the council or special fund, we suggest that the payment be recorded on the Enter Receipt screen to ensure that the proper accounts/sub accounts are recorded properly. If this payment includes money for a special or miscellaneous assessment, a reason for assessment must be entered in the Event field.

Once the Save button is clicked on the Dues Collection Tool screen or the Enter Receipt screen, this will place the transaction in pending status. Pending transactions can be processed on the Pending Receipt screen.

A Report of Receipts is available under the Treasurer Reports in the Print Center of Member Billing. There are four reports available: two for pending receipts and two for posted receipts. Note that the posted receipts reports will display signature lines for the financial secretary and treasurer, which will serve as a record that the treasurer received these moneys.

Note: If the treasurer's name does not display on this report, add his data on the Council Officers—Current Year screen in Member Management.

PROCESSING MONEY FROM OTHER SOURCES

Section 139.1 of the Laws of the Order specifies that the financial secretary shall collect all moneys accruing to the council from members and other sources. These

moneys can be recorded in Member Billing using the Enter Receipt screen under the Council Ledger (Illustration # 8, page 35).

Member or Payor – Prior to entering the receipt information, you must search for a member or a payor.

Note: A payor is an individual or entity that is not a member of the council (i.e., the Supreme Council or state council). A payor can be added to Member Billing on the Add a Payee/Payor screen under Billing Information.

Once a search has been conducted, the results will appear in the Search Results box to the right. Click on the desired member or payor so that it is highlighted in a blue banner. Click the Select button to populate the date and member/payor in the Enter Receipt section on the bottom of the screen. Then continue to enter the remaining information.

Once the save button is clicked on the Dues Collection Tool screen or the Enter Receipt screen, the transaction is placed in pending status. Pending transactions can be processed on the Pending Receipt screen.

A Report of Receipts is available under the Treasurer Reports in the Print Center of Member Billing (Illustrations # 9 & 10, pages 36 and 37). There are four reports available: two for pending receipts and two for posted receipts. Note that the posted receipts report will display signature lines for the financial secretary and treasurer, which will serve as a record that the treasurer received these moneys.

Note: If the treasurer's name does not display on this report, add his data on the Council Officers—Current Year screen in Member Management.

PROCESSING VOUCHERS FOR PAYMENT

After a bill has been properly approved for payment, the financial secretary must initiate the procedure for issuance of a check by the treasurer, which can be accomplished under the Vouchers section of the Council Ledger (Illustration # 11, page 38).

Member or Payee – Prior to entering the voucher information, you must search for a member or a payee.

Note: A payee is an individual or entity that is not a member of the council (i.e., the Supreme Council or state council). A payee can be added to Member Billing on the Add a Payee/Payor screen under Billing Information.

Once a search has been conducted, the results will appear in the Search Results box to the right. Click on the desired member or payee so that it is highlighted in a blue banner. Click the Select button to populate the date and member/payee in the Enter Vouchers section on the bottom of the screen. Then continue to enter the remaining information.

Once the Save button is clicked on the Enter Vouchers screen, the transaction is placed in pending status. Pending transactions can be processed on the Pending Vouchers screen.

A Report of Vouchers is available under the Treasurer Reports in the Print Center of Member Billing (Illustration #12, page 39). There are two reports available: one for pending vouchers and one for posted vouchers. Note that the Report of Vouchers will display signature lines for the grand knight, financial secretary and treasurer. This serves as a record that the treasurer is authorized to issue a check.

Note: If the treasurer's name does not display on this report, add his data on the Council Officers—Current Year screen in Member Management.

OFFICERS ONLINE – EXPERT HELP & TRAINING

The Expert Help site provides step-by-step instructions to assist members in using Member Management and Member Billing. This site can be accessed by clicking on the Expert logo in the upper right-hand corner of any screen in these applications, or by going to www.kofc.org/experthelp.

Additionally, a training site for these applications has been added, which can be accessed by clicking on the Sign-In – Officers Training link located in the upper right-hand corner on the Expert Help site. This training area allows the user to update records and generate transactions in a test environment.

Illustration # 2

Officers Online	Member Billing	Print Center-MB							
<ul style="list-style-type: none"> ▶ Council Ledger ▶ Billing Information • Member Information ▶ Find a Member ▶ Search Results • Member Ledger ▶ Billing Information ▶ Contact Notes ▶ Transfers ▶ Email 	<h3 style="margin: 0;">Member Billing & Accounting - Member Ledger</h3> <div style="text-align: right;">Help</div>								
	Member								
	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> <p>George A Xavier</p> <p>Member #: 4428035 DOB: 09-17-1984</p> <p><< <input type="button" value="Prev"/> <input type="button" value="Next"/> >></p> </div> <div style="text-align: right;"> <p>Council 10705</p> <p>Phone: Wife: Allison</p> <p>Email Member </p> </div> </div>								
	<input type="button" value="Reset"/>								
	<p style="margin: 0;">Billing Status Member Balances Member Transactions Adjustment</p>								
	Billing Status								
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #333; color: white;"> <th style="width: 40%;">Status</th> <th style="width: 30%;">As of</th> <th style="width: 30%;">Paid through</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;"> <div style="display: flex; align-items: center;"> 1st Notice ▼ </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> <ul style="list-style-type: none"> Dues are Current <li style="background-color: #333; color: white;">1st Notice 2nd Notice Knight Alert Intent to Suspend Former Member </div> </td> <td style="padding: 5px;"> <div style="display: flex; align-items: center;"> 10-11-2010 📅 </div> <p style="font-size: small; margin-top: 2px;">MM-DD-YYYY</p> </td> <td style="padding: 5px;"></td> </tr> </tbody> </table>	Status	As of	Paid through	<div style="display: flex; align-items: center;"> 1st Notice ▼ </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> <ul style="list-style-type: none"> Dues are Current <li style="background-color: #333; color: white;">1st Notice 2nd Notice Knight Alert Intent to Suspend Former Member </div>	<div style="display: flex; align-items: center;"> 10-11-2010 📅 </div> <p style="font-size: small; margin-top: 2px;">MM-DD-YYYY</p>		<input type="button" value="Save Billing Status"/>	
	Status	As of	Paid through						
	<div style="display: flex; align-items: center;"> 1st Notice ▼ </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> <ul style="list-style-type: none"> Dues are Current <li style="background-color: #333; color: white;">1st Notice 2nd Notice Knight Alert Intent to Suspend Former Member </div>	<div style="display: flex; align-items: center;"> 10-11-2010 📅 </div> <p style="font-size: small; margin-top: 2px;">MM-DD-YYYY</p>							
	<p style="margin: 0;">Member Balances Member Transactions Adjustment</p>								

Illustration # 3

Billing Status | Member Balances | Member Transactions | Adjustment

Member Transactions

Date	Transaction Type	Tran #	Account: Sub Account	Amount	Void
10-11-2010	Adjustment	89	Receivable: Dues	6.25	<input type="checkbox"/>
10-11-2010	Adjustment	88	Receivable: Initiation Fee	10.00	<input type="checkbox"/>

Billing Status | Member Balances | Member Transactions | Adjustment

Adjustments

Credit Charge

Date	Adjustment Type	Adjustment Amount
<input type="text" value="11-01-2010"/> <small>MM-DD-YYYY</small>	<input type="text" value="Dues Assessment"/> <small>Dues Assessment</small> <small>Initiation Fee</small> <small>Special Assessment</small> <small>Misc Assessment</small>	<input type="text"/> <small>*****</small>
Description		Reason for Adjustment
<input type="text"/>		<input type="text"/>

128 character limit

[Enter Dues](#) | [Billing Information](#)

Illustration # 4

	Officers Online	Member Billing	Print Center-MB
--	-----------------	----------------	-----------------

Council Billing & Accounting - Enter Dues Assessment

[Help](#)

Council

FR MICHAEL J MCGIVNEY **Council 10705**

Council Location: NEW HAVEN **Jurisdiction:** CT

District: 001 **Date of Institution:** 08-14-1991

Billing Cycle

Billing Period: Jan 01, 2011 - Dec 31, 2011

Billing Status: 1st Notice

As of Date: 12-15-2010

MM-DD-YYYY

Amounts to be Assessed

Dues Amounts for Billing Period - Supreme

Class	Amount to Apply
Regular	25.00
Honorary	11.75
Honorary Life	0.00

Dues Amounts for Billing Period - Council

Sub Class	Amount to Apply

[Class List](#)

Illustration # 5


	Officers Online	Member Billing	Print Center-MB
▶ Treasurer Reports ▶ Billing ▶ Membership Cards ▶ Retention ▶ Journals & Ledger ▶ Email	Print Center - Billing Reports		
	Help		
	Billing Notices		
	<ol style="list-style-type: none">1. First Notice2. Second Notice3. <u>Knight Alert</u>4. Intent to Suspend		

Illustration # 6

Officers Online
Member Billing
Print Center-MB

- Council Ledger
 - Receipts
 - Vouchers
- Assessments
 - Enter Assessments
 - Assess Dues
 - Update Status
 - Assess Other
 - Pending Assessments
 - Assessment History
- Adjustments
- Billing Information
- Member Information
- Email

Council Billing & Accounting - Update Billing Status

[Help](#)

Council

FR MICHAEL J MCGIVNEY

Council Location: NEW HAVEN
District: 001

Council 10705

Jurisdiction: CT
Date of Institution: 08-14-1991

Billing Cycle Schedule

Billing Status	Suggested Process Date	As of Date
1st Notice	12-15-2009	12-15-2009
2nd Notice	01-14-2010	02-09-2010
Knight Alert	03-11-2010	07-14-2010
Intent to Suspend	07-29-2010	

[Billing Cycle Schedule History](#)

Update Billing Status

Billing Period:
01-01-2010 - 12-31-2010

Billing Status:
Intent to Suspend

As of Date:

MM-DD-YYYY

Illustration # 7

Officers Online Member Billing Print Center-MB

Council Billing & Accounting - Dues Collection Tool

[Help](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Outstanding Balances

Name	Member #	Billing Status	Outstanding Balance	Amount Received	Paid	Check #
<u>Xavier, George A</u>	4428035	1st Notice	16.25	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Illustration # 8

	Officers Online	Member Billing	Print Center-MB
--	-----------------	----------------	-----------------

Council Billing & Accounting - Enter Receipts Help

Council

FR MICHAEL J MCGIVNEY

Council Location: NEW HAVEN
District: 001

Council 10705

Jurisdiction: CT
Date of Institution: 08-14-1991

Search by Member/Payor

Member

Search Criteria:

Search Results:

Xavier, F Charles

Xavier, George A

Xavier, Kyle L

Enter Receipts

Date	Member/Payor	Check #	Receipt Amount
<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>MM-DD-YYYY</small>			<small>####.##</small>

Account: Sub Account	Amount	Event	Description	Split
<input type="text"/> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/> <input type="button" value="v"/>	<input type="text"/>	<input type="checkbox"/>

[Dues Collection Tool](#) |
 [Add Payee/Payor](#) |
 [Add Account](#) |
 [Add Event](#)

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 WEB: [http://www.knights.org](#)

Illustration # 9

FR MICHAEL J MCGIVNEY CO 10705
5 Hillhouse Avenue
New Haven, CT 06511



Page 1 of 1
November 08, 2010

Report of Receipts

Date Range: 11-08-2010 - 11-08-2010

Batch Range: 70 - 70

Rcpt #: 280 - 288

# of Trans	Account Sub Account	Event	Amount
1	Activities	Birthday Rose Sales	200.00
1	Activities	Movie Night	50.00
1	Activities: Fraternal	Coffee & Doughnuts	72.50

Grand Total of Report of Receipts: 322.50

Respectfully submitted,

Michael G. Smith
Financial Secretary

Received by:

Matthew J. Johnson
Treasurer

Illustration # 10

FR MICHAEL J MCGIVNEY CO 10705
5 Hillhouse Avenue
New Haven, CT 06511



Page 1 of 1
November 08, 2010

Report of Receipts - Transaction Details

Receipt # Check #	Receipt Date	Member/Payer Account: Sub Account	Event	Description	Amount
Batch: 70		Date Processed: 11-08-2010			
286 878	11-08-2010	Mr George A Xavier Activities	Movie Night	DVD & Snacks	50.00
287 879	11-08-2010	Mr George A Xavier Activities	Birthright Rose Sales	Roses & Cards	200.00
288 880	11-08-2010	Mr George A Xavier Activities: Fraternal	Coffee & Doughnuts	Supplies	72.50
Batch 70 Total:					322.50

Grand Total of Report of Receipts: 322.50

Respectfully submitted,

Michael G. Smith
Financial Secretary

Received by:

Matthew J. Johnson
Treasurer

Illustration # 11

	Officers Online	Member Billing	Print Center-MB
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Council Billing & Accounting - Enter Vouchers

[Help](#)

Council

FR MICHAEL J MCGIVNEY

Council Location: NEW HAVEN
District: 001

Council 10705

Jurisdiction: CT
Date of Institution: 08-14-1991

Search by Member/Payee

Member **Payee**

Search Criteria:

x*

Search Results:

Xavier, George A

Enter Vouchers

Date	Member/Payee	Voucher Amount
<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/>	<input type="text"/>
<small>MM-DD-YYYY</small>		<small>####.##</small>

Account: Sub Account	Amount	Event	Description	Split
<input type="text"/> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/> <input type="button" value="v"/>	<input type="text"/>	<input type="checkbox"/>

[Add Payee/Payer](#) |
 [Add Account](#) |
 [Add Event](#)

- Council Ledger
- Receipts
- Vouchers
 - Enter Vouchers
 - Pending Vouchers
 - Voucher History
- Assessments
- Adjustments
- Billing Information
- Member Information
- Email

Illustration # 12

FR MICHAEL J MCGIVNEY CO 10705
 5 Hillhouse Avenue
 New Haven, CT 06511



Page 1 of 1
 November 08, 2010

Report of Vouchers

Voucher # Check #	Voucher Date	Member/Payee / Address Account: Sub Account	Event	Description	Amount
Batch: 41		Date Processed: 11-08-2010			
116	11-08-2010	Mr George A Xavier 73 Holly Mar Hill Rd / Northford, CT 06472-1120 / United States	Activities	Tootsie Roll Drive Candy	75.00
117	11-08-2010	Mr George A Xavier 73 Holly Mar Hill Rd / Northford, CT 06472-1120 / United States	Squires Circle	Tours & Dinners Dinner	10.00
118	11-08-2010	Mr George A Xavier 73 Holly Mar Hill Rd / Northford, CT 06472-1120 / United States	Supplies: Miscellaneous	Fraternal Support Lapel Pins	5.00
Batch 41 Total:					90.00
Grand Total of Report of Vouchers:					90.00

Respectfully submitted,

 Michael G. Smith
 Financial Secretary

 Paul J. King
 Grand Knight

Received by:

 Matthew J. Johnson
 Treasurer

AUDIT

AUDIT REQUIREMENTS

Section 145 of the Laws of the Order requires that the grand knight and trustees audit the accounts of the financial secretary and treasurer at least every six months, and in January and July report to their council, district deputy, state deputy and the Supreme Secretary on forms approved by the Board of Directors and furnished by the Supreme Council. (Fourth Degree Laws require that the trustees audit the accounts of the faithful comptroller and faithful purser annually as of June 30.) **Under no circumstances should either the financial secretary or treasurer prepare the audits**, but each should be readily available to the trustees to answer questions regarding the records. The trustees are charged with this duty, and in accepting office they are accepting the responsibilities the office entails.

Trustees who sign an audit prepared by the financial secretary or treasurer are acting in an irresponsible manner. The report made to the council, district deputy, state deputy and the Supreme Secretary indicates that the trustees have examined the records of the financial secretary and treasurer. If they have not done so, the trustees cannot know that the figures thereon are correct.

If the trustees and grand knight cannot personally make the audit, they should arrange to have one made by a qualified member at the expense of the council. A responsible financial secretary will insist that his records and accounts be examined periodically according to the Laws for his protection and that of the entire council. The grand knight and trustees must arrange for the audit to be accomplished without depriving the financial secretary of his records for more than one week. The business records of any council can be properly examined within a week to assure accuracy and completeness.

The bonding company can refuse to honor the bond on either the financial secretary or treasurer (faithful comptroller/purser) for the following reasons:

- Failure of the trustees to conduct the audit, or signing an audit prepared by the financial secretary/faithful comptroller or treasurer/faithful purser
- Failure to have on file at the Supreme Council office two consecutive Audit Reports for the periods immediately past

RECORDS AND ITEMS NEEDED TO PREPARE THE AUDIT

FROM THE FINANCIAL SECRETARY . . .

- Cash receipts
- Vouchers
- Receipts, treasurer to financial secretary
- January 1 or July 1 roster, as appropriate
- Billing Statements for the audit period
- Cash and checks on hand, if any
- Bills or invoices requiring payment
- Copy of last audit

- Member ledgers (or Outstanding Balance Report in Member Billing)

FROM THE TREASURER . . .

- Treasurer's Cash Book
- Check book, bank statements, cancelled checks and vouchers for the audit period
- All bank books, regardless of purpose of account
- All documents reflecting cash or liquid assets such as stocks, bonds, notes, etc.

FROM THE RECORDER . . .

- Minute Book

COMPLETING THE AUDIT REPORT

All three sections of the Audit Report are to be completed, with the exception of those councils/assemblies using the online Member Management/Member Billing application. Those users need not complete Schedule A, since Member Management/Billing records reflect the figures maintained at the Supreme Council office. In such case, check the box under Schedule A—Alternative. The audit must be signed by the grand knight and at least two trustees. If an entry is not applicable, the word “none” should be inserted on the line. Please refer to page 46 for a sample Audit Report.

SCHEDULE A — MEMBERSHIP

A major objective of the council audit is to reconcile local council membership records with those maintained by the Supreme Council Department of Membership Records. The sources for information necessary to complete Schedule A of the Audit Report are: (1) records the financial secretary maintains on Member Billing Member Ledgers or equivalent; (2) the January 1 or July 1 Council Roster, as appropriate for the audit period and (3) monthly Council Statements provided by New Haven. The latter is especially necessary for associate to insurance, insurance to associate, transfers out of the council and, in some instances, death transactions recorded as a result of insurance claims processing. All discrepancies between local council and Supreme Council records are to be reconciled, with any necessary membership transactions being submitted to the Department of Membership Records, or...local council records being corrected as necessary to ensure agreement.

Only those members for which the applicable membership transactions have been reported are to be listed on the audit. If an addition or a deduction is being acted upon but as yet has not been submitted with sufficient time for processing, it is **not** to be indicated on the audit report. Each time a transaction is submitted to the Supreme Council office, it is the financial secretary's responsibility to verify that it has been received and processed. This is accomplished by reviewing the monthly Council Statements for the audit period — August through January statements for the January audit,

February through July statements for the July audit. Again, **only those members for which transactions have been verified as received and processed in New Haven are to be listed on the audit as additions or deductions.**

For the purpose of preparing the semi-annual audit **only**, inactive insurance members are excluded; they are **not** to be considered as insurance members of the council. If an insurance member is suspended or takes a withdrawal, he becomes inactive and is considered a deduction. Conversely, an inactive member reactivating his membership is an addition to be recorded on the Re-entries line. Also, the Transfers — Assoc. to Ins. and Transfers — Ins. to Assoc. lines in the Additions and Deductions sections must agree. For example, an insurance addition as a result of an associate to insurance transfer is also an associate deduction. **(This paragraph does not apply to the Annual Assembly Form Item #1315.)**

The figures for Total deductions in the Deductions section are to be placed on the line Minus total deductions in the Additions section and must be subtracted from the figures for Total for period to obtain the correct figures for Number members end of period.

SCHEDULE B—CASH TRANSACTIONS

FINANCIAL SECRETARY

Cash on hand beginning of period will be the figure from the previous Audit Report showing Cash on hand at end of period. Figures for Cash received — dues, initiations and Cash received from other sources will be the accounting period totals from the Reports of Receipts. Total cash received will be the total of the three previous items.

Amounts for Transferred to treasurer will be the total of the figures shown on receipts from treasurer to financial secretary for moneys received during the period by the treasurer from the financial secretary.

Cash on hand at end of period will be amounts shown Transferred to treasurer subtracted from amount shown as Total cash received. In most instances Cash on hand at end of period will show a zero balance as most financial secretaries transfer all moneys to the treasurer before the end of the audit period.

SCHEDULE B — CASH TRANSACTIONS

TREASURER

The Cash on hand beginning of period will be the figure shown on the previous audit from line Net balance on hand.

The item Received from financial secretary will be the accounting period total of the items in the Treasurer's Cash Book showing moneys received from the financial secretary. This should agree with the amount shown in the financial secretary's report on line Paid to treasurer.

Under Disbursements, the amounts for per capita payments and general expenses will be the accounting period total of payments by the council as shown in the disbursements section of the Treasurer's Cash Book.

AUDITING DUES PAYMENTS

The procedure detailed below is recommended for use by auditors in determining that dues payments were receipted, entered on the appropriate member ledgers, turned over to the treasurer, receipted by the treasurer, and deposited in the council's bank account. Conversely, it is effective in verifying that credits were not posted to member ledgers unless there is a record of payment having been received. In order to make these determinations, a representative number of accounts should be "spot checked." Proceed as follows:

- Verify several entries on each Report of Receipts to determine if credit was given on the appropriate member ledger for the amount shown.
- Verify several member ledgers to determine, in reverse order, if credit given there was received and recorded on a Report of Receipts.
- Verify the totals on each Report of Receipts to determine that moneys were turned over to the treasurer and his receipt was issued.
- Verify each treasurer's receipt to determine that the amounts shown were credited on bank statements as deposits.

To determine if the treasurer's check register is in balance with the balance shown on the end-of-period bank statement, the following procedure is suggested:

- Determine that an authorized voucher exists for each check issued and that the check was issued to the correct payee in the correct amount.
- Review the endorsements on the checks to determine that they are endorsed by the payee.
- Compare the cancelled checks to the Report of Vouchers and indicate and initial audit results on the check register.

SCHEDULE C — ASSETS AND LIABILITIES

This section will provide insight as to the financial condition of the council. From audit period to audit period it will indicate the council's financial progress—or lack of it—and where necessary will enable the trustees, state and district deputies, and the Supreme Council office to obtain a true picture of the council's financial status. However, in reviewing previous audits it is apparent that some councils include figures in this schedule that are not applicable to the audit period. This is particularly true relative to Due Supreme Council: Per capita in the Liabilities column and Due from members in the Assets column.

It appears that some councils are including as a liability the Supreme Council per capita levy for the period fol-

lowing the one for which the audit is being conducted. For example, if an audit is being made for the period ending December 31, then the Supreme Council levy for January of the following year should not be shown on the Per capita line as a liability since the audit is for the period just completed. However, should that January levy not be paid by June 30, it would be included on the next audit.

Regarding the Due from members line... This refers to dues owed and payable to the council. Such moneys are considered assets, but not yet collected. These moneys remain assets until such time as the member(s) are removed from the roles. If the financial secretary follows proper billing procedures, he will have sent the First Notices at least 15 days prior to the start of the period. Entries are **not** to be made for those members being billed for the following period. To avoid confusion, billing notices should be dated as of the first of the month of the start of the period (January 1 or July 1) not the date the bills are being prepared. However, should any portion of the bill remain unpaid into the next audit period, that portion is to be included on the ensuing Audit Report.

When a member is suspended or takes a withdrawal, the amount he owes appears on the Audit Report for the period in which he was suspended only. His ledger should be deleted from the council file on or before the end of the period in which he was removed. This procedure will help to ensure that a billing notice is not produced during the next billing period and eliminates the carryover from one period to another of uncollectible dues or other charges on members who have been removed from the roles.

ASSETS

Undeposited funds are moneys in the possession of either the financial secretary or treasurer, or both.

Assets labeled Bank — General acct. and Bank — Special acct. will be the reconciliation of the treasurer's checkbook(s) showing the net cash balance(s). Outstanding checks should be deducted from the bank statement.

Due from members data is obtained from the financial secretary's member ledger records. Refer to SCHEDULE C — ASSETS AND LIABILITIES above for guidelines regarding these figures prior to making the entries.

One indicator of the financial condition of a council is the number of members in arrears and the amounts owed. Be certain to include these figures on the report.

The treasurer will furnish the amounts for Savings/investment accts. from his Cash Book which should show transfers of cash to savings accounts or the purchase of investments. If the council owns stocks or bonds, the trustees should make a count of the investments and determine that all earnings on investments are properly credited to the council accounts.

Total current assets is the total of the five previous lines.

LIABILITIES

Figures for the Liabilities section relative to the council's obligations to Supreme, state, as well as miscellaneous will be supplied by the financial secretary from his records and from unpaid bills in his possession.

Advance payment of dues by members is to be included in Advance payments by members. For example, if a member pays dues in advance of the period billed, it is a liability because it represents dues payment not yet chargeable to the member.

The figure for Total current liabilities is also entered in the Assets column in the space designated Less: current liabilities and is subtracted from Total current assets to obtain Net current assets.

If liabilities exceed assets, the Total current assets should be subtracted from current liabilities and the resulting figure shown in (parenthesis).

INVESTMENTS

Trustees are to itemize investment assets on the appropriate lines provided for that purpose under Investments.

It is strongly recommended that an annual budget be prepared in November or December of each year following guidelines established by the council. After adoption of the budget, it is good practice to transfer funds from the council's general account to a savings account, as appropriate.

Section 145 of the Order's *Charter Constitution and Laws* outlines the duties of the board of trustees and its chairman, the grand knight. Each trustee is required to be familiar with this section and its impact on the council's finances and obligations . . . and his duties. Section 122 details the manner in which the council manages its funds. Other sections dealing with the disposition of council moneys and funds are 139-1, 139-3, 140-1, 140-2, 140-3 and 140-4.

Council by-laws may also contain laws and rules governing the expenditure of moneys. These by-laws are subject to approval by the Supreme Advocate in a manner consistent with the *Charter Constitution and Laws* and the Board of Directors.

HOME CORPORATIONS

Council officers and members should be well acquainted with all phases of operations where home corporations are concerned. Regular and complete reports should be made to the council by the corporation trustees. There should also be a periodic review as to the manner in which various activities are conducted under the auspices of the corporation board.



Due By: **AUGUST 15**

COUNCIL NO. _____ CITY _____ STATE _____

SCHEDULE A – MEMBERSHIP

ADDITIONS	INS.			ASSO.			TOT.		
Total members start of period									
Initiations									
Transfers from other councils									
Transfers—assoc. to insurance									
Transfers—ins. to associate									
Re-entries									
Total for period									
Minus total deductions									
Number members end of period									

DEDUCTIONS	INS.			ASSO.			TOT.		
Suspensions									
Deaths									
Withdrawals									
Transfers—assoc. to insurance									
Transfers—ins. to associate									
Transfers to other councils									
Total deductions									

Do not include inactive insurance members in this section. See *Financial Secretary Handbook*, Council Audit, Schedule A.

SCHEDULE A – ALTERNATIVE

Our council uses Member Management/Member Billing. The requirement for completing Schedule A is satisfied.

SCHEDULE B – CASH TRANSACTIONS

FINANCIAL SECRETARY		TREASURER	
Cash on hand beginning of period	\$ _____	Cash on hand beginning of period	\$ _____
Cash received—dues, initiations	\$ _____	Received from financial secretary	\$ _____
Cash received from other sources: (Explain kind and amount)	_____	Transfers from sav./invest. accts.	\$ _____
\$ _____		Interest earned on investments	\$ _____
\$ _____		Total receipts	\$ _____
\$ _____		Disbursements	
\$ _____		Per capita: Supreme Council	\$ _____
Total cash received	\$ _____	State council	\$ _____
Transferred to treasurer	\$ _____	General council expenses	\$ _____
Cash on hand at end of period	\$ _____	Transfers to sav./invest. accts.	\$ _____
		Miscellaneous	\$ _____
		Total disbursements	\$ _____
		Net balance on hand	\$ _____

SCHEDULE C – ASSETS AND LIABILITIES

ASSETS		LIABILITIES	
Cash:		Due Supreme Council:	
Undeposited funds	\$ _____	Per capita	\$ _____
Bank — General acct.	\$ _____	Supplies	\$ _____
— Special acct.	\$ _____	Catholic advertising	\$ _____
— Savings/investment accts.	\$ _____	Other	\$ _____
Due from _____ members	\$ _____	Due state council	\$ _____
Total current assets	\$ _____	Advance payments by _____ members	\$ _____
Less: current liabilities	\$ _____	Misc. liabilities	\$ _____
Net current assets	\$ _____		\$ _____
Investments:			\$ _____
*Furniture	\$ _____		\$ _____
*Stocks & bonds	\$ _____	Total current liabilities	\$ _____
Misc. investments	\$ _____		
Total investments	\$ _____	Signed this _____ day of _____ 20 _____	
Less: Investment liabilities	\$ _____	_____ Grand Knight	
Net investment assets	\$ _____	_____ Trustee	
Total assets	\$ _____	_____ Trustee	
		_____ Trustee	

*Use reverse side to describe. Please complete all items. Insert "None" where no figures are to be shown.



Due By: AUGUST 1

ASSEMBLY NO. _____ **CITY** _____ **STATE** _____

SCHEDULE A – MEMBERSHIP

ADDITIONS	TOTAL	DEDUCTIONS	TOTAL
Total members start of period		Suspensions	
Initiations		Withdrawals	
Restorations		Deaths	
Transfers from other assemblies		Transfers to other assemblies	
Additions from council transactions		Deductions from council transactions	
Total for period		Total deductions	
Minus total deductions			
Number members end of period			

SCHEDULE A – ALTERNATIVE

Our assembly uses Member Management/Member Billing. The requirement for completing Schedule A is satisfied.

SCHEDULE B – CASH TRANSACTIONS

FAITHFUL COMPTROLLER		FAITHFUL PURSER	
Cash on hand beginning of period	\$ _____	Cash on hand beginning of period	\$ _____
Cash received—dues, initiations	\$ _____	Received from faithful comptroller	\$ _____
Cash received from other sources: (Explain kind and amount)	\$ _____	Transfers from sav./invest. accts.	\$ _____
_____ \$ _____		Interest earned on investments	\$ _____
_____ \$ _____		Total receipts	\$ _____
_____ \$ _____		<u>Disbursements</u>	
Total cash received	\$ _____	Expenses of delegates	\$ _____
Transferred to faithful purser	\$ _____	General assembly expenses	\$ _____
Cash on hand at end of period	\$ _____	Transfers to sav./invest. accts.	\$ _____
		Miscellaneous	\$ _____
		Total disbursements	\$ _____
		Net balance on hand	\$ _____

SCHEDULE C – ASSETS AND LIABILITIES

ASSETS		LIABILITIES	
Cash:		Due Supreme Council:	
Undeposited funds	\$ _____	Supplies	\$ _____
Bank – General acct.	\$ _____	Other	\$ _____
– Special acct.	\$ _____	Due district master	\$ _____
– Savings/investment accts.	\$ _____	Advance payments by _____ members	\$ _____
Due from _____ members	\$ _____	Misc. liabilities	\$ _____
Total current assets	\$ _____		\$ _____
Less: current liabilities	\$ _____		\$ _____
Net current assets	\$ _____		\$ _____
Investments:		Total current liabilities	\$ _____
*Furniture	\$ _____		
*Stocks & bonds	\$ _____	Signed this _____ day of _____ 20 _____	
Misc. investments	\$ _____	_____ Faithful Navigator	
Total investments	\$ _____	_____ Trustee	
Less: Investment liabilities	\$ _____	_____ Trustee	
Net investment assets	\$ _____	_____ Trustee	
Total assets	\$ _____		

*Use reverse side to describe.
Please complete all items. Insert "None" where no figures are to be shown.

**MEMBERSHIP
RECORDS
AND
FORMS**

USE OF PROPER FORMS

On occasion, financial secretaries attempt to change the status of a member by means other than use of the required form — generally by submitting an email or letter. Failure to use and complete the proper form can cause unnecessary correspondence and delay a member's change to another status. Therefore, it is important that the financial secretary make use of the correct form to facilitate membership changes.

ADMISSION COMMITTEE AND MEMBERSHIP ADMISSION PROCEDURES

The following guidelines detail the duties of the grand knight in relation to appointment of an admission committee, the procedures to be utilized by the committee in its interviews with prospective members and the method to follow when presenting the member's application to the council for approval.

The Board of Directors, in interpreting the Laws (Sections 108-109, 112-113), has prescribed the following procedure for all councils of the Order:

- The grand knight of each council shall immediately after entering upon his term of office appoint an admission committee composed of seven members. This is mandatory. Within five days after the application for membership is presented to him, the grand knight shall refer the application to the admission committee, and the chairman of said committee shall immediately notify the applicant to appear before it for examination as to his qualifications for membership.
- The admission committee has the power of rejection only if five members file a written report with the grand knight certifying that the applicant is not a practical or practicing Catholic. There are no requirements relative to profession, education, national background, skin color, nationality, cultural level, or financial status. If it is determined that the applicant is not a practical Catholic, his application shall be deemed rejected and the facts shall be noted thereon by the grand knight, who shall advise the proposer. As to whether an applicant is a practical Catholic is for the Church to decide. Therefore, it is expected that before a written report is filed, the committee will have discussed the situation with the chaplain of the council or the applicant's pastor and will be bound by the decision of either.
- Having determined that the applicant is a practical Catholic, the admission committee shall submit to the grand knight its report and recommendations within ten days following the date when the application was delivered by the grand knight to the chairman of the admission committee. At the first meeting of the council following

receipt by the grand knight of the report and recommendations of the admission committee, or upon the expiration of ten days following delivery of the application to the chairman of the admission committee—if there is no report from the committee with respect to the application—the grand knight shall proceed with reading the application. Except when notice of application shall be published as provided in Section 110, the council shall proceed forthwith (at the same meeting) to ballot for the admission of such applicant after said reading. Prior to balloting after the first and only reading, the warden shall determine and report to the grand knight and the deputy grand knight the number of members present, and the recorder shall record in the minutes of the meeting the report of the warden.

- The grand knight cannot delay the processing of the application under any circumstances, for unless the application is rejected because the applicant is not a practical Catholic as shall be determined by at least five members of the committee, he shall read the application at the first meeting following the ten days allowed for the report of the admission committee. This reading is not restricted to a regular meeting or a business meeting.
- Balloting shall be by distribution to the members present a blank slip of paper and each member shall write thereupon either the word "yes" or "no" and nothing more.
- Balloting for candidates shall be in charge of the warden. After exhibiting the ballot box to the grand knight and deputy grand knight, the warden shall deposit the same on the salutation table and take his place six feet therefrom. He shall then request that all officers vote by depositing their ballots in the ballot box and after they have voted, he shall request the members to vote in the same manner. They shall advance in single file and deposit their ballots. After all who desire to do so have voted, the warden shall exhibit the ballot box to the grand knight and deputy grand knight, and they shall examine and count the ballots. If the number of negative ballots cast does not exceed one-half of the members present, the applicant shall be declared elected. The grand knight shall announce the result but the exact number of negative ballots shall not be stated. **The Laws require a negative vote of more than one-half present for rejection, not a negative vote of one-half of those voting.**
- If more than one candidate is to be balloted for at a meeting, the grand knight may announce that the first ballot shall be a general one upon all the candidates, and that if not more than one-half of those present shall cast negative ballots upon

such general ballot, no other ballots shall be taken. If the announcement is made by the grand knight and not more than one-half negative ballots of those present are cast upon said general ballot, all candidates so balloted for shall be declared elected. If more than one-half negative ballots of those present are cast upon said general ballot, an individual ballot shall then be taken on each candidate.

- Applications for membership from priests and religious need not be referred to the admission committee for determination of practical Catholicity. The opportunity to discuss Knights of Columbus programs with the committee should not, however, be denied to a priest or religious brother. But if he does appear before the admission committee, his practical Catholicity shall not be referenced nor judged as part of the interview process.
- Impose another duty on the admission committee in cases of reapplication by a former member who has been in an exit status for more than seven years. Such an applicant must appear before and be approved by the admission committee. In addition thereto, the reapplicant must establish to the satisfaction of the committee that he has received the degrees of the Order. If this cannot be established, the reapplicant shall be required to take any or all degrees.

THE INTERVIEW

The Inquiries Guide (#390)—see page 59—is helpful in conducting the interview as it provides a suggested outline to be followed by the admission committee. Using it will help assess the applicant's Catholicity and citizenship and will provide insight into his potential contributions to the council. During the interview, the committee should also review the answers provided by the applicant at the bottom of his Form 100 Membership Document under the heading: Interests/Preferences. During the interview process, every opportunity should be provided for the applicant to ask questions about the Order. In fact, he should be encouraged to do so. A Form 100 Membership Document completed for a new member application appears on page 60.

REPORT OF ADMISSION COMMITTEE

Following the interview, the committee must vote on acceptance or rejection of the candidate and complete the appropriate report — page 61. If the candidate is accepted, only the signature of the chairman is required. The report showing acceptance is presented to the grand knight within ten days following the date when the application was delivered by the grand knight

to the chairman of the admission committee. If the candidate is rejected, refer to page 48 for guidance.

REPORT OF OFFICER ELECTIONS

Section 128 of the Order's Laws states that elections of subordinate council officers shall be held between May 15 and June 15 of each year (college councils—March 1 to June 1). Those duly elected officers are to be reported to the Supreme Council office on the Report of Officers Form 185. Deadline for submission of the form is July 1.

The Form 185 is pictured on page 62. A copy of the actual form is contained in the Council Report Forms Booklet, Item #1436. The Report Forms Booklet is sent annually to financial secretaries of record for use during the fraternal year. The original copy of the Report of Officers is to be forwarded to the Department of Membership Records. Copies must also be sent to the state deputy and district deputy. Be certain to retain a copy for local council records.

The preferred method of reporting newly elected council officers is through the Member Management application located in the secure Officers Online area at www.kofc.org. Simply follow the instructions included on the website. There is no need to file a paper report with the Supreme Council office after reporting officers through the Member Management application.

You can also visit our website at www.kofc.org and complete the Report of Officers Form 185. Click on: For Officers, Forms, Council, 185. Please note, however, that this form must then be printed and mailed to the Supreme Council office. **It cannot be submitted electronically.** The information contained on the form must also be reported to the state deputy and district deputy.

MEMBERSHIP DOCUMENT — FORM 100

The Form 100 Membership Document is used to report most membership transactions to the Supreme Council office relating to new, present or former members. (Disability exemption and withdrawal are the exceptions. Refer to those respective sections for details.) As financial secretary, you must be familiar with all of the membership transactions and how to report them. The chart on page 63 explains which sections on the Form 100 are to be completed to effect the various transactions reported on that form.

On occasion correspondence is submitted along with the Form 100 to further qualify the transaction being reported. Such correspondence is always welcome. However, with the exception of data changes and withdrawals, no attempt should be made to report transactions solely by correspondence. The historical record of a source document is lost. It is also for this reason that faxed Form 100s are most often unacceptable since the

quality is unsuitable for archival purposes. Higher quality scanned documents are generally acceptable and are encouraged as they speed up submission times. Scanned Form 100s are to be emailed to *membership@kofc.org*. **If emailing a Form 100, do not submit the paper form to the Supreme Council office later.** Doing so is unnecessary and may result in a duplicate membership record. **Regardless of the medium used, only one copy of the Form 100 should be forwarded to New Haven.**

POINTERS FOR COMPLETING THE FORM 100

In Section 1 the financial secretary must include the council number and also the membership number, if applicable to the transaction being reported. Date elected and First Degree date should be indicated, if appropriate.

In Section 2 be sure to mark the transaction box. Including degree attained information for manual submissions of honorary/honorary life requests assures that degree information will appear on the card. Please note that death processing requires the full date of death to include month, day and year. If survivor information is known, include that information in the box located beneath Section 6. This will enable the Supreme Knight to write to the survivor, expressing condolences.

Section 3 of the form must be completed regardless of the type of transaction being reported. Be sure to include the full name and address, complete and legible. Avoid using nicknames. Titles should be limited to religious (Bro, Rev, Very Rev, Most Rev) or professional (Dr). Date of birth is to be reported: MM/DD/YYYY. Contact information is very important. Thus, in addition to the address, please include telephone numbers and a valid email address.

Section 4 allows for input of parish information, Knights of Columbus degree dates and former council data, where appropriate. An affirmative response is required as to the applicant's practical Catholicity. **Priests and religious need not answer this question.** The annuity questions in Section 5 need to be answered by all new member applicants. Required signatures are to be affixed in Section 6. The chart on page 63 indicates which signatures are required for the various transactions.

The questions included under the Applicant's Interests/Preferences section at the bottom of the form should be completed whenever the applicant is new to or re-entering the council. Those answers help the council determine the applicant's interests for committee assignments as well as give insight as to what the applicant expects to gain as a member of the Knights of Columbus. Where applicable, the Form 100 must be available to the admission committee during the interview process.

When filling out the Form 100, care should be taken to ensure legibility of all information provided, including officers' signatures. If in doubt as to whether to provide certain data, include it on the form. It is better to supply more information than necessary, as opposed to omitting data required for processing. Such omissions can result in additional correspondence and possible delays in processing.

Extra care should be exercised when the member has elected to take advantage of the annuity offer for his wife. The front of the Form 100 should be filled in correctly and completely, bearing in mind that the Duplicate copy must be as legible as the Original. Then the Duplicate copy should be detached before the annuity application is completed on the reverse side.

NEW MEMBER

The initiation of new members should be reported to the Supreme Council office within 24 hours of the degree ceremony using the Form 100 Membership Document (page 60). **Do not delay submission of a Form 100, awaiting reception of the higher degrees of the Order.** It is the First Degree that establishes membership, and the recording of that degree is required to continue new insurance applications in force. However, it is your responsibility to report **Second and/or Third Degree dates to the Supreme Council office as these degrees are received.** Refer to "Data Change" on page 55 for instructions on reporting dates of degrees received subsequent to the original Form 100 submission.

The applicant accepts or declines the annuity offer in Section 5 on the front of the Form 100. If he is married, he does the same for his wife. **If the annuity offer is declined for both parties,** the Original copy of the Form 100 is sent directly to the Supreme Council office and the Duplicate is sent to the general insurance agent. Always retain the Council copy for your records.

If the applicant accepts the annuity offer, he must complete the ten sections on the reverse side of the Original copy of the Form 100. If he is applying for annuity coverage on his wife, she must complete the reverse side of the duplicate copy. He must sign as the applicant and she must sign as the annuitant. For legibility, the Duplicate Copy of the Form 100 should be detached before the wife completes the reverse side. The financial secretary collects a premium of no less than \$100.00 for each proposed annuitant. He shall retain all copies of the Form 100 and the premium payment(s) until the candidate receives his First Degree. Any questions about the New Member Annuity Plan should be submitted to the general agent.

Immediately following the First Degree, the financial secretary will send to the general insurance agent both the Original and Duplicate copies of the Form 100, the premium payments, and the General Agent copies of

Transmittal Form 175FS — page 77. This is done if either the candidate, his wife, or both accept the annuity offer. (NOTE: The field agent may pick up these documents for delivery to the general agent.) The financial secretary retains the Council copy of the Form 100 and the Financial Secretary copy of the Transmittal Form 175FS for his records.

This transaction is credited as an **addition** toward Supreme Council Award quotas.

JUVENILE TO ADULT

Juvenile to adult constitutes a specific category of new member transaction, and the preceding section applies to this transaction as well. An applicant for membership who holds an in-force insurance policy issued while he was under 18 years of age is to be processed as a juvenile to adult transaction. If the prospect applies for membership prior to his nineteenth birthday, the maximum initiation fee that can be charged is \$5.00. A juvenile to adult application appears on page 64.

This transaction is credited as an **addition** toward Supreme Council Award quotas.

REINSTATEMENT

Reinstatement is appropriate if membership termination has been for a period of **three months or less**. To reinstate his membership, the applicant pays to the financial secretary of his former council all arrearages, whereupon the financial secretary shall notify the Supreme Council office on a Form 100 (page 65). Reinstatements can only take place in the council from which the member was suspended or took a withdrawal. **A reinstatement will not reflect a break in membership.** No council action is required.

REACTIVATION

The proper transaction for re-entry of an inactive insurance member is reactivation. Please refer to page 66 for a sample Form 100 completed for reactivation. The reactivation fee is set at \$5.00. No fee is required if he left the Order by withdrawal before October 1, 2003. **Years of service prior to suspension or withdrawal, unless it is the twenty-five years of consecutive membership required, do not count toward the requirements for honorary or honorary life membership.**

READMISSION

This transaction is appropriate if membership termination has been for a period of **more than three months and up to seven years**. The applicant may be readmitted into the council of his choice. Council action on his membership is required, but action by the admission committee is normally not needed.

If the applicant left his former council by withdrawal before October 1, 2003, attach his withdrawal card to the Form 100 and collect from him advance dues (quarter-annual minimum). If the applicant was suspended for nonpayment or he left by withdrawal on or after October 1, 2003, he must pay a \$7.50 re-entry fee in lieu of all council arrearages. The financial secretary forwards the Form 100 (page 67) to the Supreme Council office and processes the \$7.50 into a council account. If two councils are involved, the receiving council will be charged \$7.50 and the former council credited a like amount. These charges/credits appear on the councils' next monthly statements. No monetary adjustment is made when the member re-enters his former council.

Years of membership prior to suspension or withdrawal, unless it is the twenty-five years of consecutive membership required, do not count toward the requirements for honorary or honorary life membership.

REAPPLICATION

When an applicant has been out of the Order for **more than seven years**, reapplication is the proper transaction to be used — see page 68. He may reapply to the council of his choice, paying the \$7.50 re-entry fee, which is retained by the council. The reapplicant need not retake his degrees if he satisfies the admission committee that he's already done so. He pays no initiation fee. If the applicant left by withdrawal before October 1, 2003, he simply attaches the withdrawal card to his Form 100 and pays only future dues. **Years of service prior to suspension or withdrawal, unless it is the twenty-five years of consecutive membership required, do not count toward the requirements for honorary or honorary life membership.**

NOTE: **Reinstatement, readmission, reactivation, and reapplication** are sometimes confused, resulting in the wrong box being marked on the Form 100. At other times, the wrong box is marked because complete, accurate information is not available at the time the document is completed.

Upon receipt of a Form 100 in the Membership Records Department, the record of the member is researched thoroughly, and the correct transaction is effected based on home office records. For this reason, the financial secretary should not be overly concerned with matters such as, for example, how long the member has been suspended, information which would be necessary to determine whether or not an associate member should be processed as a readmission or a reapplication. The only exception to this procedure is the **reinstatement** transaction. If a member has paid all back dues and is desirous of returning to your council within 90 days

of his suspension or withdrawal, you **must mark reinstatement to ensure continuous service.**

Re-entry transactions involving more than one council can introduce the problem of maintaining accurate Second and Third Degree date information. In such cases the new council financial secretary should email the Supreme Council Department of Membership Records for assistance.

Reinstatement, readmission, reactivation and reapplication transactions are credited as **additions** toward Supreme Council Award quotas.

TRANSFER

A member in possession of a current membership card may transfer to any council of his choice by making application on a Form 100 (illustration on page 69). The receiving council accepts the application for transfer under the elective procedures. Please note that a **transfer is initiated only by the receiving council.** Members cannot be transferred out of a council. It is suggested that the financial secretary of the receiving council estimate any arrearages the applicant may owe his former council and collect this amount (if any) in addition to the required advance dues.

Upon receipt of the transfer application, the Supreme Council office will immediately transfer the applicant to the new council. If the transferring member is honorary or honorary life, a new plastic card will be generated reflecting his new council number. The card is then forwarded to the financial secretary for presentation.

The former council is advised of the effective date of transfer on a Transfer Account Adjustment Form 142. A completed sample of the Form 142 appears on page 77. The financial secretary of the former council will enter outstanding **degree information, annual dues, dues paid to. . . (mo/yr) and the credit or past due balance.** For your convenience in computing balances, a dues adjustment chart is illustrated on page 70. Balances are to be calculated as of the last day of the month of transfer. When completing a Transfer Account Adjustment for an honorary member, overwrite the "Honorary" designation preprinted in the Annual Dues box with the honorary dues calculation appropriate for your jurisdiction and figure any balance based on that amount.

NOTE: If using Member Billing, the Transferred Member Ledger for this member can be found by searching by his last name in the Transfers section under Member Information in Member Billing.

Following completion of a Form 142, the appropriate copy is to be retained for council files and the remaining two copies returned to the Department of Membership Records.

Upon receipt of the completed Form 142 (144 for an assembly), the Supreme Council office will charge or credit the former council/assembly and enter an offsetting charge or credit to the receiving unit. The New Council (Assembly) copy is then mailed to the financial secretary/faithful comptroller. He will adjust the account of the transferee and record any provided membership information on the member ledger.

NOTE: The Account Adjustment for Transfer Form is not a supply item and cannot be ordered. It is generated by the Supreme Council office only after a member transfer has been processed.

This transaction is **not counted** toward or against Supreme Council Award quotas.

HONORARY MEMBERSHIP

A member who has attained the age of 65 years and who has been a member of the Order 25 consecutive years shall be designated an honorary member. If the 25 years of continuous service is calculated from the last date of entry, the award is automatic. If 25 years of unbroken service was achieved prior to a suspension or withdrawal transaction, the distinction must be requested in writing – submission of a Form 100 by the financial secretary (see page 71).

The honorary membership distinction includes a plastic membership card that is sent to the financial secretary for presentation to the member at a suitable occasion. In the case of automatic processing, the card includes degree information, provided the member's record at the Supreme Council office indicates that he is a Third or Fourth Degree. In the case of a manual submission, the financial secretary can also indicate degree information on the Form 100. A picture of the plastic card can be found on page 73.

The honorary member is exempt from general fund charges, except payment of an amount equal to the **sum** of Supreme Council assessments—\$4.50/year—and the annual levies of your state council. Because of this annual payment requirement, a paper membership card must be issued by the financial secretary on a yearly basis. The honorary member must present that card to gain access to Knights of Columbus functions.

Fourth Degree honorary members pay \$10 per annum in lieu of all assembly assessments.

This transaction is not applicable toward Supreme Council Award quotas.

HONORARY LIFE MEMBERSHIP

Members who have attained the age of 70 years and who have been members of the Order for 25 consecutive years, and those who have been members of the Order for 50 consecutive years regardless of age, shall be designated as honorary life members. If the required years of continuous service is calculated from the last date of entry, the

award is automatic. If the required years were achieved prior to a suspension or withdrawal transaction, the distinction must be requested in writing — submission of a Form 100 by the financial secretary (see page 72).

Honorary life members are exempt from further payment of dues, per capita charges and assessments. No Supreme or state council assessments are levied against them. All priests and religious brothers who have taken their final or perpetual vows are automatically designated as honorary life members upon receiving the First Degree of the Order. However, this status is not awarded to permanent deacons or seminarians unless they meet the requirements based on age and years of service.

The honorary life membership distinction includes a plastic membership card that is sent to the financial secretary for presentation to the member at a suitable occasion. In the case of automatic processing, the card includes degree information, provided the member's record at the Supreme Council office indicates that he is a Third or Fourth Degree. In the case of a manual submission, the financial secretary can also indicate degree information on the Form 100. A picture of the plastic card can be found on page 73.

The honorary life member should retain the last regular membership card he was issued if his plastic honorary life card does not include degree information. If lost or otherwise unavailable, the financial secretary, upon request of the honorary life member, should issue a paper membership card showing degree attained, with "honorary life" indicated on the Dues paid to line. The honorary life member may also request from the Supreme Council office a duplicate honorary life card with degree information indicated. Priests and religious brothers are permitted access to all Knights of Columbus functions with only the honorary life card, even if it doesn't indicate degree attained.

An honorary life member cannot be suspended for nonpayment. He can, however, request a withdrawal or be suspended for cause. In such case, you must request that he relinquish his plastic honorary life card.

This transaction is not applicable toward Supreme Council Award quotas.

SUSPENSION—NONPAYMENT

Suspension for nonpayment represents a significant group of losses to our Order each year. Thus, it is of vital importance that proper billing procedures be followed before active membership is terminated by suspension. Please refer to page 4 for full details on proper billing procedures including use of the Notice of Intent to Suspend. Actual suspension of the member is accomplished by filing a subsequent Form 100, an example of which is shown on page 74.

A member must be in arrears at least four months before he can be suspended for nonpayment. Any member in that status, however, is to be advised that a current membership card is required for attendance and participation at all Knights of Columbus business meetings and ceremonial exemplifications. A "current" membership card is defined as one bearing a dues paid to date equal to or greater than the current date.

A suspended insurance member is recorded as an inactive member and remains on the council rolls in that status as long as his insurance is in force. The council continues to be responsible for Supreme and state-levied assessments. However, a \$9.00 credit is applied to the council's account the month following the anniversary date of the member's insurance policy to help offset such assessments.

This transaction is charged as a **loss** against Supreme Council Award quotas.

WITHDRAWAL

The **withdrawal transaction cannot be reported using the Form 100 Membership Document**. Rather, a **personal signed communication** from the member requesting withdrawal (resignation) is required to be sent to the council or assembly and forwarded on to the Supreme Council office.

The Membership Records Department must be satisfied that the resignation/withdrawal has been initiated by the member, not suggested by the council or

FORM 100 DISTRIBUTION AT A GLANCE.....

Proper distribution of the Form 100 helps ensure prompt, accurate transaction processing. Distribute as follows:

TRANSACTION

New Member and/or Juvenile to Adult (annuity selected on husband and/or wife)

New Member and/or Juvenile to Adult (no New Member Annuity selected) and **all** other transactions

DISTRIBUTION

Original—General Insurance Agent
Duplicate—General Insurance Agent
Council—Retain for council records

Original—Supreme Council office
Duplicate—General Insurance Agent
Council—Retain for council records

assembly by supplying a form letter for the member to sign. The most common acceptable request for withdrawal is an email or the return of a billing statement with a note requesting separation from the Order. An attempt to remove a member by withdrawal without submission of a request from the member clearly initiated by him will be denied. Any member who does not specifically request separation from the Knights of Columbus but is in arrears should be processed as a suspension for non-payment.

In good standing financially is not a consideration for withdrawal. A member can resign whether he is current in his dues or in arrears. The only stipulation is that he must be eligible for re-entry as of the date he files his letter of withdrawal with the council or assembly. Withdrawal is **not** an option for a member who is to be suspended/expelled for felony conviction, a violation of Section 162 of the Order's Laws or non-practical Catholicity. Those members who apply for and are granted a **withdrawal do not maintain continuous membership**. The membership record will reflect a break in service.

If the applicant for withdrawal is an insurance member, he remains on the council rolls in an inactive status. The council is responsible for Supreme and state-levied assessments and also receives the annual \$9.00 credit, as explained under suspension.

This transaction is charged as a **loss** against Supreme Council Award quotas.

SUSPENSION—LACK OF PRACTICAL CATHOLICITY

One of the requirements for membership in the Knights of Columbus is... "practical Catholic in union with the Holy See." In order to remain on the active rolls, a current member must maintain his practical Catholicity. On occasion, however, members leave the faith, marry outside of the Church or otherwise lose that status. In such cases, they forfeit their membership "ipso facto" — by virtue of the fact.

Before the suspension can be processed, however, tangible evidence to support a suspension under Section 168.1 of the Order's Laws is required. A statement must be on file in the Supreme Council office from the council chaplain or the member's parish priest to the effect that the man in question is no longer a practical or practicing Catholic. Also acceptable is a statement signed by the member, admitting to the infraction giving rise to the attempted suspension. One of these statements, along with a completed Form 100, must be submitted before suspension processing can be initiated.

This transaction is **not counted** against Supreme Council Award quotas.

SUSPENSION—FELONY CONVICTION

Section 168.6 of the Order's Laws stipulates forfeiture of membership for felony conviction. A felony is generally one where the potential penalty is greater

than one year incarceration. To substantiate conviction, you must submit: **a newspaper account of the conviction, written confirmation from the prosecutor or a certified copy of the court documentation**. Proof of conviction should include a description of the crime as a felony. Any **one** of the aforementioned proofs of conviction, certification that the individual convicted is known by you to be the member to have his membership forfeited and, of course, a completed Form 100 are sufficient for suspension under Section 168.6.

This transaction is **not counted** against Supreme Council Award quotas.

SUSPENSION—MISCONDUCT

Detailed instructions on filing complaints against a member, his rights to plead and trial are found in Chapter XIX of the Order's Laws. Charges against a member must be filed in writing with the grand knight—Section 171. The grand knight must give the accused a copy of the charges within five days—Section 172. The accused has ten days to notify the grand knight whether he pleads guilty or not guilty—Section 173.

If a not-guilty plea is presented to the grand knight, the district deputy must examine the charges to determine if they present a prima facie case—Section 174. If the district deputy finds a prima facie case, he appoints a trial committee—Section 175. The trial committee then proceeds to trial pursuant to the provisions of Sections 176, 177 and 178 of the Order's Laws.

A completed Form 100 Membership Document and all paperwork resulting from compliance with Section XIX of the Laws of the Order must be forwarded to the Department of Membership Records before suspension processing can be initiated.

This transaction is **not counted** against Supreme Council Award quotas.

DEATH

The death of a council member should be reported to the Supreme Council office as soon as possible. The Form 100 Membership Document can be used to report the death as well as survivor information (see page 75). Deaths can also be reported most efficiently by using the Member Management application, located in the secure Officers Online area of *kofc.org*. If Member Management is used to report this transaction, there is no need to submit additional documentation.

The death transaction cannot be processed without the **full date of death — month/day/year**. Under no circumstances should a financial secretary or any other member of a council declare or report someone as being deceased without sufficient proof that the

individual is deceased. There are legal consequences that can stem from making false declarations, in addition to the possibility that news of the false report may inflict emotional trauma on the individual's family or that law enforcement officials, the individual's employer or various other third party/agencies may take action in reliance on the report.

Death notices received at the home office within six months of the date of death will enable the Supreme Knight to write to the survivor, expressing condolences on the death of the member. Notices received in excess of six months following the actual date of death are not considered timely, and the Supreme Knight's condolence letter is not sent.

This transaction is **not counted** against Supreme Council Award quotas.

DATA CHANGE

Changes in personal, contact or membership information can be reported by filing a Form 100 with the Department of Membership Records. Be certain to mark the Data Change transaction box and include the member's name, membership number and the data to be changed. An address change is depicted on page 76.

The financial secretary is free to report information changes in a variety of formats as long as the changes are legible and accurate. For example, in certain cases returning a corrected copy of a council roster or other source document might expedite the reporting process.

However, electronic reporting is preferred. The Member Management application, located in the secure Officer's Online area of *kofc.org* is an efficient, paperless platform for reporting data changes. You may want to encourage council members to submit address changes directly by clicking on For Members on the home page and then Update Contact Information.

DISABILITY — RELIEF FROM PAYMENT

Those brother Knights who are unable to engage in any occupation for a period of at least six months may apply for waiver of dues under Section 118(e) of the Order's Laws. Evidence of total disability must be furnished to the Supreme Council, along with the Form 1831—Application for Relief from Payment of Council Dues and Supreme and State Council Per Capita Charges (picture on page 78). The Form 1831 must be signed by the disabled member, the grand knight and the financial secretary.

All disability waivers expire on December 31 of each year and must be renewed during the 90 days prior to expiration. A letter is sent from the Supreme Council office requesting confirmation of continued disability during October and must be signed by the grand knight and financial secretary. The letter is then to be

returned directly to the Department of Membership Records.

Council members who are exempt from dues payment under Section 118(e) are to be issued a membership card on a calendar year basis. In the case of a member qualified for exemption under both Sections 118(e) and 118(d) — honorary life — the honorary life designation takes precedent.

Specific guidelines pertaining to application for and renewal of relief under Section 118(e) appear on page 79.

MEMBERSHIP CARDS

Financial secretaries are required to issue membership cards to First, Second, and Third Degree members who have qualified by paying their dues and other charges to the council in advance for three months, but not more than one year.

The card shall be stamped with the council seal (Section 240—*Charter Constitution and Laws*) and should be given or sent to the member by the financial secretary within a few days of payment.

For councils using manual record-keeping systems, membership cards are padded in groups of 100. The first 75 cards in each book have "3rd" imprinted in red on the face. The last 25 cards have no imprint. The cards with "3rd" are for Third Degree members only so as to make it immediately apparent to anyone who has occasion to examine the card that the card holder is a Third Degree member.

The last 25 cards in each book are for First and Second Degree members. The proper degree must be entered on the card by the financial secretary — page 80. These cards will immediately show the examiner that the member has not yet achieved the Third Degree.

For councils using Member Billing, membership cards are available in packages of 200 (Item #4817). The application prints the highest degree attained, based on the information in Member Management.

The financial secretary should take special precautions to safeguard blank membership cards so that none would be readily available to an unscrupulous person who could issue them to unqualified members or to others not in the Order, thus permitting illegal entry of ineligible persons into council meetings or degrees. A properly completed membership card requires entries as follows: name, membership number, degree data, council number and location, dues paid to date and signatures of the grand knight and financial secretary.

CONSTITUTIONAL ROLL

The Constitutional Roll of Membership (Form #343) is a bound book that is used at Exemplification of the First Degree. A page from the book is reproduced on page 81.

At the top of the page are blank spaces for insertion of the council name, number and location. Following this are four statements regarding membership rules and regulations that govern when a candidate becomes a member.

The first of these (a) deals with the commencement of membership and the effective date of insurance, if the candidate has applied for insurance. These rules may be summarized as follows:

- Candidate must be elected and initiated in the First Degree
- Insurance application must be approved by the Supreme Physician
- First contribution payment must have been made

This particular section should be called to the attention of candidates who apply for insurance.

In the second paragraph (b) the candidate agrees to abide by the Charter, Constitution, By-Laws, Rules and Regulations of the Knights of Columbus and of the council of which he is to become a member. This includes any laws made or enacted at a later date.

The candidate agrees in the third paragraph (c) to abide by decisions of the Board of Directors or successors in all matters of difference or dispute between the Supreme Council and any council, officer or member.

Finally, in the fourth paragraph (d) the candidate attests to having read and become fully acquainted with the contents of his application for membership and that the statements are true. This also applies to his application for insurance. He also agrees that the statement and answers form part of the consideration for membership in the Order.

The member signs the roll in the space headed Name and inserts council number in the appropriate space. He also writes whether he is an associate or insurance candidate in the column labeled Insurance or Associate. The financial secretary enters the initiation dates of the First, Second and Third Degrees that are given the candidate.

This is an extremely valuable record for the council and should be retained permanently in council files.

The Constitutional Roll of a particular council should include only the names of those candidates being initiated into that council. Where candidates are being initiated for another council, the financial secretary of the other council must provide his council's

Constitutional Roll for insertion of his candidates' signatures.

The complete text of the stipulations to which the candidate agrees is as follows:

THE UNDERSIGNED, each for himself, in consideration of having been admitted to membership in the Knights of Columbus through..... Council No. located in does hereby covenant and agree with said Knights of Columbus and said Council as follows:

- a. That my membership in the Knights of Columbus shall not commence until I have been regularly initiated in the First Degree of the Order and that if I have made application for insurance, I shall have no rights as an insurance member, except as may be set forth in any temporary insurance agreement, nor be considered as such, nor shall any claim accrue in favor of my beneficiary unless and until I have been elected to membership and initiated in the First Degree, until my insurance application, if any, has been approved by the Supreme Physician and until the first payment of contributions on the certificate has been paid, and then only in the event at the date when all said requirements shall have been met my health and insurability remain the same as at the date of the completion of Part 1 of my insurance application, if any, or at the date of Part 2 thereof, whichever date is later.
- b. That the Charter, Constitution, By-Laws, Rules and Regulations of the Knights of Columbus, and of any council thereof of which I may at any time be a member, which are now in force or which may at any time hereafter be duly made or enacted, including any change in the manner, method or amount of the insurance contributions, shall be binding upon me and my beneficiary.
- c. That I will abide by the decision of the Board of Directors of the Knights of Columbus, or their successors in office, in all matters of difference or dispute between the said Knights of Columbus or any council or any officer or member thereof and myself relative to membership or the obligations of membership in the said Knights of Columbus.
- d. That I have read my application for membership in its entirety and am fully acquainted with its contents and that I hereby warrant each and every material statement by me made therein and in my application for insurance, if any, is true, and that all other statements therein are, in the absence of fraud, deemed representations and not warranties and that they are the only statements and answers upon which a benefit certificate may be issued to me by the Knights of Columbus and I agree on behalf of myself and of

any person who may have any claim or interest on account of the benefit certificate which may be issued to me that said statements and answers form part of the consideration for my acceptance as a member of the Knights of Columbus.

PAYMENT OF DEATH BENEFITS

ASSISTANCE TO BENEFICIARIES

As financial secretary, you are expected to provide assistance to beneficiaries of deceased brother Knights in obtaining prompt payment of death benefits that may be due on insurance policies issued by the Order. **Normally, your responsibilities in that regard are limited to notifying your council's insurance representative of the passing of a member in your council.** However, in the event that a servicing agent cannot make himself available in a timely manner, it may become necessary for you to play a more direct role in providing assistance to beneficiaries.

An alert financial secretary regularly reads the death notices in local papers and, without delay, advises the deputy grand knight or the memorial committee chairman of the demise of a member of the Order. At the same time, a Form 100 Membership Document indicating the death of the member is filed with the Supreme Council office. The Duplicate copy of the Form 100 is sent to the council's insurance representative. Information which must be entered on the Membership Document includes the member's name, membership number and complete date of death — month, day and year. Survivor information — to include the full name of the survivor, the relationship to the deceased member, and the complete address — enables the Supreme Knight to write to the survivor and express condolences on the passing of the brother Knight.

While reviewing death notices printed in local newspapers, you should also be on the alert for deceased family members of brother Knights. In most cases, you as the financial secretary will have no knowledge as to whether a family member may have been insured by the Knights of Columbus. Therefore, upon the death of a family member of a brother Knight, you should contact the council's insurance representative immediately to furnish him with this information. He will determine whether the deceased was insured by the Order and, if so, will take appropriate action.

In the event you must provide direct assistance to beneficiaries, you should become familiar with the Proof of Death Forms #261-1, #261-1B, and #261-2. Samples of the forms appear on pages 82, 83, and 84. Pay particular attention to the instructions printed on the forms.

Section 71 of the Laws of the Order, which is reprinted on this page, governs the disposition of death benefits in cases where the beneficiary of record has

died before the insured or is otherwise disqualified to receive benefits. An understanding of the terms of that section will enhance your ability to help claimants in filling out Proof of Death forms. It will also help you realize why additional information is needed when the claimant is someone other than a qualified beneficiary of record. Section 71 of the Laws should be studied carefully well in advance of having to provide direct assistance to beneficiaries.

By conscientious, efficient handling of death benefit matters, a financial secretary provides an important service to the surviving dependents and generates goodwill for the local council and the Order.

DELIVERY OF CHECK

Ordinarily, all death benefit checks will be mailed directly from the Supreme Council office to the payees, with a copy of the forwarding letter going to the general agent.

However, in individual cases, where a timely written authorization is received at the Supreme Council Claims Department from the beneficiary, the benefit check will be forwarded to the named person as instructed.

EXCERPT FROM THE LAWS OF THE KNIGHTS OF COLUMBUS

BENEFICIARIES

Sec. 71.1. Each application for a benefit certificate shall include a beneficiary designation. The certificate holder may, from time to time, change such designation in such form and manner as the Board of Directors shall prescribe provided that the Order may refuse to accept any designation or change of designation which appears to the Order to be in violation of any state or provincial law to which the certificate is subject, or where it appears to the Order that there would be lack of substantial insurable interest.

2. Where, upon the death of the insured, it appears that the certificate holder has failed to make any designation, or that all of the named beneficiaries are dead, or if the designation shall fail for illegality or otherwise, then the death benefit shall be paid in the order of precedence as herein set forth:

First: The insured's spouse.

Second: The insured's children. Under this section, the term "children" shall be defined as: (1) all biological children of the insured; (2) all legally adopted children of the insured; (3) any step-children of the insured from the insured's marriage to his/her spouse at the time of death; (4) any children of a predeceased child of the insured — such children shall take their share of the deceased parent.

Third: The insured's natural parents, or in the event the person insured had been legally adopted, his or her adoptive parents.

Fourth: Any surviving brothers or sisters of the insured.

Fifth: The insured's estate.

LOST CERTIFICATES (POLICIES)

Form No. 113D for replacement of lost benefit certificate is available. It is known as: Affidavit and Agreement Concerning Loss or Destruction of Benefit Certificate.

When loss of a certificate is reported and a duplicate requested, the financial secretary is asked to obtain from the member the following information:

- Whether it is definitely known that the original certificate is irrecoverably lost or destroyed.
- Whether it is needed for processing a cash surrender request.

Occasionally, a financial secretary learns that the certificate is neither lost nor destroyed but is being held by the beneficiary or some other person against the insured's wishes. Please suggest to the insured that he may wish to consult his attorney to attempt to recover the certificate. If the certificates are being dealt with in connection with a divorce, or other judicial proceedings, suggest to the member that this fact be made known at once to the Supreme Council office.

NOTE: It is not necessary to require the benefit certificate to be sent to the Supreme Council office with any request for change of beneficiary (Form #113A).

INSURANCE REINSTATEMENT

Members who have allowed their insurance to lapse have the privilege of reinstating by completing an Application for Insurance Reinstatement (Form #1164, page 85 and Form #898, page 86) where applicable. The forms and necessary payment can be mailed to the Supreme Council office — Payment Receipts Department.

The statement on the health of the applicant is subject to review by the Supreme Physician with the possibility that further evidence of insurability may be required. It is stipulated that the certificate shall not be considered a reinstatement until it is approved at the Supreme Council office.

If the financial secretary assists the applicant, he should make certain that the application and the payment are forwarded together. The form needed and the information as to the amount of payment required should be obtained by writing to the Payment Receipts Department, Reinstatement Division, giving the following information:

- Name of applicant (If a juvenile, then both the applicant's name and the juvenile's name)
- Address
- Number (certificate or policy)

The application and the information on the required payment will then be sent to the financial secretary. **Whenever possible, the financial secretary should refer insurance matters to the agency representative in the area.**



KNIGHTS OF COLUMBUS

INQUIRIES GUIDE FOR ADMISSION COMMITTEE

Questions listed below are offered as a guideline for the members of the admission committee. The Supreme Council insurance representative should be invited to attend this meeting. The candidate's responses to these suggested questions should be helpful in determining his attitudes, talents, and general interest as a prospective member of the council, and as a participant in the council's Service Program. The candidate should be made to feel welcome at the meeting which should be conducted informally. During the interview, review the responses the applicant gave on his Form 100 Membership Document.

ON THE CATHOLICITY OF THE CANDIDATE

- A practical or practicing Catholic man in union with the Holy See is a man who accepts the teaching authority of the Catholic Church on matters of faith and morals, aspires to live in accord with the precepts of the Catholic Church, and is in good standing in the Catholic Church. *Are you a practical or practicing Catholic?*
- *Do you know your pastor or any of his assistants personally?*
- *Are you a member of any parish organizations? Do you hold, or have you held, office in any of these organizations?*
- *Have you worked as a volunteer in any parish project?*
- *Do you subscribe to Catholic periodicals, newspapers, etc.?*
- *Do you serve as a deacon, eucharistic minister, lector, usher or in some other ministry?*

ON THE CITIZENSHIP OF THE CANDIDATE

- *Are you a member of any civic, trade, professional or other fraternal organizations?*
- *Do you hold, or have you held, office in any of these organizations?*
- *Have you served, or are you serving on any committees for organizations such as the Red Cross, Cancer/Heart associations, Special Olympics, etc.?*
- *Do you hold, or have you held an elective or appointed office in the municipal, state or provincial government?*
- *Are you a registered voter? Do you regularly vote in local, state or provincial and national elections?*

ON OUR ORDER

- *Why are you interested in joining the Knights of Columbus?*
- *Were you invited to join or did you ask to join?*
- *Has anyone explained the member benefits to you or the financial obligations such as initiation fees or annual dues?*
- *What is your personal project or interest in the neighborhood, parish or community?*
- *What is your favorite hobby, sport or recreational activity?*
- Every K of C council has an organizational format of elected and appointed officials. *Would you be interested in serving or assisting in some administrative capacity now or in the future?*
- *What do you expect your K of C membership to provide you and your family?*
- *What do you hope to contribute to the Order?*

The members of the admission committee and the Supreme Council insurance representative should be prepared to answer any questions raised by the candidate. They should be encouraged to give the applicant a brief explanation of the insurance features of our Order and the various aspects of the Service Program.

PLEASE TYPE OR PRINT IN INK



KNIGHTS OF COLUMBUS

1 COLUMBUS PLAZA, NEW HAVEN CT 06510

Membership Document

A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

1	COUNCIL NUMBER 18000	COUNCIL LOCATION (CITY, ST/PROV) NEW HAVEN CT	MEMBERSHIP NUMBER	DATE READ 12/19/08	DATE ELECTED 12/18/08	1ST DEG. DATE 1/18/09
2	TRANSACTION <input checked="" type="checkbox"/> NEW MEMBER		<input type="checkbox"/> REACTIVATION (inactive insurance)	<input type="checkbox"/> TRANSFER IN	<input type="checkbox"/> DATA CHANGE	
	<input type="checkbox"/> JUVENILE TO ADULT		<input type="checkbox"/> READMISSION (up to 7 years)	<input type="checkbox"/> HONORARY MEMBERSHIP	<input type="checkbox"/> SUSPENSION	
	<input type="checkbox"/> REINSTATEMENT (up to 3 months)		<input type="checkbox"/> REAPPLICATION (over 7 years)	<input type="checkbox"/> HONORARY LIFE MEMBERSHIP	<input checked="" type="checkbox"/> DEATH	

3	LAST NAME RANSOME	FIRST NAME THOMAS	MIDDLE INITIAL L	TITLE
	STREET 1430 S. WINDSLOW RD.	CITY NORTHFORD	ST/PROV CT	POSTAL CODE 06799-1122
	COUNTRY (OUTSIDE US)			

MO	DATE OF BIRTH DAY	YR	MARITAL STATUS	HOME PHONE	BUSINESS PHONE	CELL PHONE
4	10	62	MARRIED	(203) 991-8841	(203) 231-0751	(203) 824-6730
E-MAIL ADDRESS tom.ransome@aol.com			OCCUPATION (M/F), (YR)	LAST FOUR DIGITS OF TAX ID (e.g., SSN)		
			ARCHITECT / JOHN BRISCOE CORP.	XXXXX-4898		

4	ARE YOU A PRACTICAL OR PRACTICING CATHOLIC IN UNION WITH THE HOLY SEE? (SEE DEFINITION ON REVERSE SIDE OF COUNCIL COPY)		YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>	PARISH NAME, LOCATION (CITY, ST) ST. JOHN'S NORTHFORD, CT		FORMER COLUMBIAN SQUIRE? <input checked="" type="checkbox"/>
	1. FIRST	2. SECOND	3. THIRD	4. FOURTH			
	DATE OF TERMINATION	REASON	NUMBER OF LAST COUNCIL	COUNCIL LOCATION (CITY, ST/PROV)			

5 NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE).

I am applying for myself Yes No I am applying for my wife Yes No

6	HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP. PRINTED NAME OF PROPOSER ARTHUR T. HENRY	HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS. I AGREE THAT THE KNIGHTS OF COLUMBUS MAY USE AN OUTSIDE AGENCY TO OBTAIN INFORMATION CONCERNING MY CURRENT ADDRESS. <i>Thomas L. Ransome</i> SIGNATURE OF APPLICANT
	PROPOSER'S MEMBER NUMBER (required) 6587958	<i>James P. Harlow</i> FINANCIAL SECRETARY
	DATE 12/18/08	<i>James C. [Signature]</i> GRAND KNIGHT

FAMILY INFORMATION

WIFE'S NAME **CHRISTINA T. RANSOME**

NAMES AND AGES OF CHILDREN **KELLY, 21**
ELIZABETH, 19
PETER, 15

COMPLETE WHEN REPORTING MEMBER DEATH ONLY.

NEXT OF KIN _____

RELATIONSHIP _____

STREET _____

CITY _____

ST/PROV _____ POSTAL CODE _____

APPLICANT'S INTERESTS/PREFERENCES

Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process.

CHURCH COMMUNITY COUNCIL
 FAMILY YOUTH MEMBERSHIP RECRUITMENT/RETENTION

Please specify interests: Working with youth, coaching sports, volunteerism

What do you expect from your membership in the Knights of Columbus?
An increased sense of community and a deeper connection to the Catholic church.

In your opinion, what can you do or contribute to assist in the successful operation of this council?
Volunteer my time when needed and participate enthusiastically in council events.

Date of Interview: _____ Signed: _____
ADMISSION COMMITTEE CHAIRMAN

TRANSACTIONS WITH ANNUITY APP(S) TO GENERAL AGENT ALL OTHER TRANSACTIONS TO SUPREME COUNCIL OFFICE.

* THESE QUESTIONS DO NOT APPLY TO FIFTEEN AND THIRTEEN.

ORIGINAL COPY

Knights of Columbus

SUPREME COUNCIL

P O BOX 1670, NEW HAVEN CT 06507-0901

REPORT OF ADMISSION COMMITTEE

To: Grand Knight of Council No. 18000

Date: 1/26/97

The Admission Committee interviewed

Thomas F. Johnson on 1/19/97
name date

Our interview and investigation discloses that said applicant is a practical Catholic and it is now in order for the application to be presented to the Council Yes
yes or no

Further, we recommend the following Council action:

X favorable

 unfavorable

(In the event the Admission Committee determines the applicant is not a practical Catholic five members of the Committee must sign below — otherwise the signature of the chairman is sufficient.)

Submitted by: Robert Angala
Chairman



Council # 13000

DATE OF ELECTION 6/03/08

PLEASE PRINT – INDICATE MEMBERSHIP NUMBERS

Due By:
JUNE 30, 2009

COUNCIL ADDRESS (Meeting Location)

STREET <u>1519 HARTFORD STREET</u>		ADDITIONAL ADDRESS	
CITY <u>NEW HAVEN</u>		ST <u>CT</u>	POSTAL <u>06510-3325</u>

MEMBERSHIP NO. <u>4265701</u>	LAST NAME <u>SCOTT</u>	FIRST NAME <u>JAMES</u>	INITIAL <u>C</u>
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ADDRESS CHANGE
STREET 14 GRASSY LN. CITY MILFORD STATE/PROVINCE CT ZIP/POSTAL CODE 06619-1136

NEWLY ELECTED RE-ELECTED
TELEPHONE AREA CODE (203) 561-7774 EMAIL james.scott@aol.com

MEMBERSHIP NO. <u>4976532</u>	LAST NAME <u>WILLARD</u>	FIRST NAME <u>JAMES</u>	INITIAL <u>M</u>	EMAIL <u>jwillard@yahoo.com</u>
----------------------------------	-----------------------------	----------------------------	---------------------	------------------------------------

ADDRESS CHANGE
STREET 17 HARBOR ST. CITY FAIRFIELD STATE/PROVINCE CT ZIP/POSTAL CODE 06518-7134

MEMBERSHIP NO. <u>6975654</u>	LAST NAME <u>YUNKUS</u>	FIRST NAME <u>WILLIAM</u>	INITIAL <u>E</u>	EMAIL <u>william.yunkus@gmail.com</u>
----------------------------------	----------------------------	------------------------------	---------------------	--

ADDRESS CHANGE
STREET 4697 BRIDGEPORT AVE CITY MONROE STATE/PROVINCE CT ZIP/POSTAL CODE 06653-6224

MEMBERSHIP NO. <u>9767765</u>	LAST NAME <u>HARRIS</u>	FIRST NAME <u>GEORGE</u>	INITIAL <u>W</u>	EMAIL <u>gharris@yahoo.com</u>
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ADDRESS CHANGE
STREET 46 HARRISON AVE. CITY MILFORD STATE/PROVINCE CT ZIP/POSTAL CODE 06793-1480

MEMBERSHIP NO. <u>8775654</u>	LAST NAME <u>DIXON</u>	FIRST NAME <u>DAVID</u>	INITIAL <u>E</u>	EMAIL <u>dixon@gmail.com</u>
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ADDRESS CHANGE
STREET 971 HANCOCK CT. CITY BRIDGEPORT STATE/PROVINCE CT ZIP/POSTAL CODE 06787-4571

MEMBERSHIP NO. <u>0654327</u>	LAST NAME <u>BROWN</u>	FIRST NAME <u>THOMAS</u>	INITIAL <u>W</u>	EMAIL <u>tom.brown@aol.com</u>
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ADDRESS CHANGE
STREET 461 HANCOCK CT CITY BRIDGEPORT STATE/PROVINCE CT ZIP/POSTAL CODE 06787-4571

MEMBERSHIP NO. <u>7574653</u>	LAST NAME <u>DILLON</u>	FIRST NAME <u>JAMES</u>	INITIAL <u>L</u>	EMAIL <u>jmdillon@hotmail.com</u>
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ADDRESS CHANGE
STREET 976 HARRISON AVE. CITY MILFORD STATE/PROVINCE CT ZIP/POSTAL CODE 06793-1480

MEMBERSHIP NO. <u>4361094</u>	LAST NAME <u>JOHNSON</u>	FIRST NAME <u>THOMAS</u>	INITIAL <u>W</u>	EMAIL <u>thomas.johnson@gmail.com</u>
----------------------------------	-----------------------------	-----------------------------	---------------------	--

MEMBERSHIP NO. <u>7879765</u>	LAST NAME <u>JOHNSON</u>	FIRST NAME <u>CORNELIUS</u>	INITIAL <u>F</u>	EMAIL <u>cjohnson@yahoo.com</u>
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MEMBERSHIP NO. <u>8765432</u>	LAST NAME <u>NUCERA</u>	FIRST NAME <u>THOMAS</u>	INITIAL <u>E</u>	EMAIL <u>tom.nucera@aol.com</u>
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MEMBERSHIP NO. <u>9765557</u>	LAST NAME <u>HENRY</u>	FIRST NAME <u>THOMAS</u>	INITIAL <u>J</u>	EMAIL <u>thomashenry@gmail.com</u>
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MEMBERSHIP NO. <u>9876549</u>	LAST NAME <u>MATHEWS</u>	FIRST NAME <u>JAMES</u>	INITIAL <u>W</u>	EMAIL <u>jimmathews@yahoo.com</u>
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COUNCIL MEETS FIRST AND THIRD TUESDAYS James P Harlow
SIGNED F.S.

- THIS INFORMATION IS ESSENTIAL FOR TRANSACTION OF OFFICIAL BUSINESS AND DIRECT MAIL COMMUNICATIONS WITH OFFICERS.
- APPOINTMENT OF FINANCIAL SECRETARY. (SECTION 128, LAWS AND RULES).
THE FINANCIAL SECRETARY SHALL BE APPOINTED BY THE SUPREME KNIGHT, HE SHALL HOLD OFFICE AT THE WILL OF THE SUPREME KNIGHT.

MAIL ORIGINAL TO: Supreme Secretary MAIL COPIES TO: State Deputy, District Deputy, Council File

FORM 100 MEMBERSHIP DOCUMENT

All transactions require: 1) council number(s) indicated
2) transaction block checked

TYPE OF TRANSACTION	Section 1	Section 2	Section 3	Section 4	Section 5	Appl. Sig. – Section 6	G.K. Sig. – Section 6	F.S. Sig. – Section 6	Show Memb. No.	Show Former Co.	Admission Committee	Council Action
<i>New Member Application</i> 1) Applicant must accept or decline New Member Annuity offer for himself and his wife (if married)	X	X	X	X	X	X	X	X			X	X
<i>Juvenile to Adult</i> 1) Applicant must accept or decline New Member Annuity offer for himself and his wife (if married)	X	X	X	X	X	X	X	X			X	X
<i>Reinstatement</i> 1) Break in service is three months or less 2) Member pays all arrearages 3) Assures continuous service	X	X	X	X				X	X			
<i>Readmission</i> 1) Break in service is over three months, up to seven years	X	X	X	X		X	X	X	X	X		X
<i>Reactivation – Inactive Insurance Member</i> 1) \$5.00 reactivation fee	X	X	X	X		X	X	X	X	X		X
<i>Reapplication</i> 1) Break in service is over seven years 2) If no previous membership number on file, Supreme Council office assigns number	X	X	X	X		X	X	X	X	X	X	X
<i>Transfer</i> 1) Check membership card and estimate any arrearage	X	X	X	X		X	X	X	X	X		X
<i>Honorary Membership</i> 1) 25 consecutive years of service 2) 65 years of age	X	X	X					X	X			
<i>Honorary Life Membership</i> 1) 25 consecutive years of service 2) 70 years of age	X	X	X					X	X			
<i>Suspension – Non-payment</i> 1) Notice of Intent to Suspend Form 1845 filed 2) Personal contact made	X	X	X				X	X	X			
<i>Death</i> 1) Provide date – month, day and year 2) Supply next of kin information	X	X	X					X	X			
<i>Data Change</i> 1) Enter data to be changed	X	X	X					X	X			

PLEASE TYPE OR PRINT IN INK



KNIGHTS OF COLUMBUS

1 COLUMBUS PLAZA, NEW HAVEN CT 06510

Membership Document

A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

1	COUNCIL NUMBER 18000	COUNCIL LOCATION (CITY, ST/PROV) NEW HAVEN, CT	MEMBERSHIP NUMBER	DATE READ 9/23/08	DATE ELECTED 9/23/08	1ST DEG. DATE 12/5/08
2	TRANSACTION <input type="checkbox"/> NEW MEMBER <input checked="" type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REACTIVATION (inactive insurance) <input type="checkbox"/> READMISSION (up to 7 years) <input type="checkbox"/> REAPPLICATION (over 7 years) <input type="checkbox"/> TRANSFER IN <input type="checkbox"/> HONORARY MEMBERSHIP <input type="checkbox"/> HONORARY LIFE MEMBERSHIP <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> SUSPENSION <input type="checkbox"/> DEATH					
3	LAST NAME: WILSON FIRST NAME: JOHN MIDDLE INITIAL: J. TITLE: _____ STREET: 97 WILBER CT. CITY: MERIDEN ST/PROV: CT POSTAL CODE: 07593-7613 COUNTRY (OUTSIDE US): _____ DATE OF BIRTH: MO: 2 DAY: 3 YR: 91 MARITAL STATUS: SINGLE HOME PHONE: (203) 986-5432 BUSINESS PHONE: _____ CELL PHONE: (203) 214-7877 E-MAIL ADDRESS: John.wilson@gmail.com OCCUPATION/EMPLOYER: STUDENT / CENTRAL CONN. STATE LAST FOUR DIGITS OF TAX ID (e.g., SSN): XXXX-7856					
4	ARE YOU A PRACTICAL OR PRACTICING CATHOLIC IN UNION WITH THE HOLY SEE? (SEE DEFINITION ON REVERSE SIDE OF COUNCIL COPY) YES <input checked="" type="checkbox"/> NO <input type="checkbox"/> PARISH NAME: ST. AMBROSE LOCATION (CITY, ST): MERIDEN, CT FORMER COLUMBIAN SQUIRE? YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> DID YOU APPLY FOR MEMBERSHIP PREVIOUSLY? YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> INITIATION DATES: 1. FIRST _____ 2. SECOND _____ 3. THIRD _____ 4. FOURTH _____ DATE OF TERMINATION: _____ REASON: _____ NUMBER OF LAST COUNCIL: _____ COUNCIL LOCATION (CITY, ST/PROV): _____					
5	NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE) I am applying for myself <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No I am applying for my wife <input type="checkbox"/> Yes <input type="checkbox"/> No					
6	I HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP: PRINTED NAME OF PROPOSER: JAMES T. WILSON PROPOSER'S MEMBER NUMBER (required): 8597852			I HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS. I AGREE THAT THE KNIGHTS OF COLUMBUS MAY USE AN OUTSIDE AGENCY TO OBTAIN INFORMATION CONCERNING MY CURRENT ADDRESS. SIGNATURE OF APPLICANT: <i>John Wilson</i> DATE: 12/5/08 FINANCIAL SECRETARY: <i>James P Harlow</i> SIGNATURES: <i>James C. [Signature]</i> (GRAND KNIGHT)		
FAMILY INFORMATION WIFE'S NAME: _____ NAMES AND AGES OF CHILDREN: _____			COMPLETE WHEN REPORTING MEMBER DEATH ONLY. NEXT OF KIN: _____ RELATIONSHIP: _____ STREET: _____ CITY: _____ ST/PROV: _____ POSTAL CODE: _____			
APPLICANT'S INTERESTS/PREFERENCES Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process. <input checked="" type="checkbox"/> CHURCH <input type="checkbox"/> COMMUNITY <input type="checkbox"/> COUNCIL <input type="checkbox"/> FAMILY <input checked="" type="checkbox"/> YOUTH <input checked="" type="checkbox"/> MEMBERSHIP RECRUITMENT/RETENTION Please specify interests: <u>coaching, catholic education, parish events</u>						
What do you expect from your membership in the Knights of Columbus? <u>A stronger sense of brotherhood within my immediate church community.</u> In your opinion, what can you do or contribute to assist in the successful operation of this council? <u>Being open and available to donate my time and resources.</u>						
Date of Interview: _____			Signed: _____			
TRANSACTIONS WITH ANNUITY APP(S) TO GENERAL AGENT			ALL OTHER TRANSACTIONS TO SUPREME COUNCIL OFFICE.			

THESE QUESTIONS DO NOT APPLY TO PRIESTS AND RELIGIOUS

ORIGINAL COPY

PLEASE TYPE OR PRINT IN INK



KNIGHTS OF COLUMBUS

1 COLUMBUS PLAZA, NEW HAVEN CT 06510

Membership Document

A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

1	COUNCIL NUMBER 17499	COUNCIL LOCATION (CITY, ST/PROV) WATERBURY, CT	MEMBERSHIP NUMBER 6543219	DATE READ	DATE ELECTED	1ST DEG. DATE
2	TRANSACTION <input type="checkbox"/> NEW MEMBER <input type="checkbox"/> REACTIVATION (inactive insurance) <input type="checkbox"/> TRANSFER IN <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> READMISSION (up to 7 years) <input type="checkbox"/> HONORARY MEMBERSHIP <input type="checkbox"/> SUSPENSION <input checked="" type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REAPPLICATION (over 7 years) <input type="checkbox"/> HONORARY LIFE MEMBERSHIP <input type="checkbox"/> DEATH PROVIDE SURVIVOR INFORMATION BELOW					
3	LAST NAME: SCOTT FIRST NAME: HARVEY MIDDLE INITIAL: F. TITLE: _____ STREET: 179 HAMILTON AVE. CITY: WATERBURY ST/PROV: CT POSTAL CODE: 07565 COUNTRY (OUTSIDE US): _____ DATE OF BIRTH: 1/11/57 MARITAL STATUS: _____ HOME PHONE: (203) 687-3459 BUSINESS PHONE: (203) 281-1705 CELL PHONE: _____ E-MAIL ADDRESS: harvey.scott@gmail.com OCCUPATION/EMPLOYER: _____ LAST FOUR DIGITS OF TAX ID (e.g., SSN): XXXX-4455					
4	ARE YOU A PRACTICAL OR PRACTICING CATHOLIC IN UNION WITH THE HOLY SEE? (SEE DEFINITION ON REVERSE SIDE OF COUNCIL COPY) YES <input type="checkbox"/> NO <input type="checkbox"/> PARISH NAME, LOCATION (CITY, ST): _____ FORMER COLUMBIAN SOURCE? YES <input type="checkbox"/> NO <input type="checkbox"/> DID YOU APPLY FOR MEMBERSHIP PREVIOUSLY? YES <input type="checkbox"/> NO <input type="checkbox"/> INITIATION DATES: 1. FIRST: _____ 2. SECOND: _____ 3. THIRD: _____ 4. FOURTH: _____ DATE OF TERMINATION: 3/31/08 REASON: NON PAYMENT NUMBER OF LAST COUNCIL: 17499 COUNCIL LOCATION (CITY, ST/PROV): WATERBURY, CT					
5	NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE) I am applying for myself <input type="checkbox"/> Yes <input type="checkbox"/> No I am applying for my wife <input type="checkbox"/> Yes <input type="checkbox"/> No					
6	I HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP PRINTED NAME OF PROPOSER: _____ PROPOSER'S MEMBER NUMBER (required): 5/21/08			I HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS IN RESPECT THAT THE KNIGHTS OF COLUMBUS MAY USE AN OUTSIDE AGENCY TO OBTAIN INFORMATION CONCERNING MY CORRECT ADDRESS. SIGNATURE OF APPLICANT: <i>Francis L. Floyd</i> FINANCIAL SECRETARY: _____ SIGNATURES: _____ GRAND KNIGHT: _____		
FAMILY INFORMATION WIFE'S NAME: _____ NAMES AND AGES OF CHILDREN: _____			COMPLETE WHEN REPORTING MEMBER DEATH ONLY. NEXT OF KIN: _____ RELATIONSHIP: _____ STREET: _____ CITY: _____ ST/PROV: _____ POSTAL CODE: _____			
APPLICANT'S INTERESTS/PREFERENCES Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process. <input type="checkbox"/> CHURCH <input type="checkbox"/> COMMUNITY <input type="checkbox"/> COUNCIL <input type="checkbox"/> FAMILY <input type="checkbox"/> YOUTH <input type="checkbox"/> MEMBERSHIP RECRUITMENT/RETENTION Please specify interests: _____						
What do you expect from your membership in the Knights of Columbus? _____ In your opinion, what can you do or contribute to assist in the successful operation of this council? _____						
Date of Interview: _____			Signed: _____			
TRANSACTIONS WITH ANNUITY APP(S) TO GENERAL AGENT. ALL OTHER TRANSACTIONS TO SUPREME COUNCIL OFFICE.						

*THESE QUESTIONS DO NOT APPLY TO PRIESTS AND RELIGIOUS

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KNIGHTS OF COLUMBUS

1 COLUMBUS PLAZA, NEW HAVEN CT 06510

Membership Document

A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

1	COUNCIL NUMBER 18000	COUNCIL LOCATION (CITY, ST/PROV) NEW HAVEN, CT	MEMBERSHIP NUMBER 8197654	DATE READ 1/19/09	DATE ELECTED 1/19/09	1ST DEB. DATE
2	TRANSACTION <input type="checkbox"/> NEW MEMBER <input checked="" type="checkbox"/> REACTIVATION (inactive insurance) <input type="checkbox"/> TRANSFER IN <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> READMISSION (up to 7 years) <input type="checkbox"/> HONORARY MEMBERSHIP <input type="checkbox"/> SUSPENSION <input type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REAPPLICATION (over 7 years) <input type="checkbox"/> HONORARY LIFE MEMBERSHIP <input type="checkbox"/> DEATH (degree attained) (degree attained) (reason) (MO DAY YR) PROVIDE SURVIVOR INFORMATION BELOW					
3	LAST NAME: ROBERTS FIRST NAME: JOSEPH MIDDLE INITIAL: J. TITLE: STREET: 611 PARKER CT. CITY: BERLIN ST/PROV: CT POSTAL CODE: 06546-4310 COUNTRY (OUTSIDE US): DATE OF BIRTH: 5/19/59 MARRIED: <input checked="" type="checkbox"/> HOME PHONE: (203) 212-7986 BUSINESS PHONE: CELL PHONE: (860) 784-3292 E-MAIL ADDRESS: j.roberts@gmail.com OCCUPATION/EMPLOYER: CARPENTER / ARUTINO CORP. LAST FOUR DIGITS OF TAX ID (e.g., SSN): XXXX-6655					
4	*ARE YOU A PRACTICAL OR PRACTICING CATHOLIC IN UNION WITH THE HOLY SEE? (SEE DEFINITION ON REVERSE SIDE OF COUNCIL COPY) YES <input checked="" type="checkbox"/> NO <input type="checkbox"/> PARISH NAME LOCATION (CITY, ST): ST. ANN'S BERLIN, CT *FORMER COLUMBIAN SQUIRE? YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> DID YOU APPLY FOR MEMBERSHIP PREVIOUSLY? YES <input checked="" type="checkbox"/> NO <input type="checkbox"/> INITIATION DATES: 1. FIRST: 12/1/79 2. SECOND: 1/9/80 3. THIRD: 4/1/81 4. FOURTH: DATE OF TERMINATION: 10/31/01 REASON: NONPAYMENT OF DUES NUMBER OF LAST COUNCIL: 18000 COUNCIL LOCATION (CITY, ST/PROV): NEW HAVEN, CT					
5	NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE) I am applying for myself <input type="checkbox"/> Yes <input type="checkbox"/> No *I am applying for my wife <input type="checkbox"/> Yes <input type="checkbox"/> No					
6	I HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP. PRINTED NAME OF PROPOSER: JAMES DILLON PROPOSER'S MEMBER NUMBER (required): 7504653 DATE: 1/19/09 FINANCIAL SECRETARY: James P Harlow			I HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS. I AGREE THAT THE KNIGHTS OF COLUMBUS MAY USE AN OUTSIDE AGENCY TO OBTAIN INFORMATION CONCERNING MY CURRENT ADDRESS. SIGNATURE OF APPLICANT: Joseph J. Roberts SIGNATURE: James P Harlow GRAND KNIGHT		
FAMILY INFORMATION WIFE'S NAME: MICHELLE T. ROBERTS NAMES AND AGES OF CHILDREN: RYAN, 22 ALEX, 18 AMANDA, 16			COMPLETE WHEN REPORTING MEMBER DEATH ONLY. NEXT OF KIN: RELATIONSHIP: STREET: CITY: ST/PROV: POSTAL CODE:			
APPLICANT'S INTERESTS/PREFERENCES Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process. <input type="checkbox"/> CHURCH <input type="checkbox"/> COMMUNITY <input type="checkbox"/> COUNCIL <input type="checkbox"/> FAMILY <input type="checkbox"/> YOUTH <input type="checkbox"/> MEMBERSHIP RECRUITMENT/RETENTION Please specify interests: _____ What do you expect from your membership in the Knights of Columbus? In your opinion, what can you do or contribute to assist in the successful operation of this council? Date of Interview: _____ Signed: _____ ADMISS. ON COMMITTEE CHAIRMAN TRANSACTIONS WITH ANNUITY APP(S) TO GENERAL AGENT ALL OTHER TRANSACTIONS TO SUPREME COUNCIL OFFICE.						

* THESE QUESTIONS DO NOT APPLY TO PRIESTS AND RELIGIOUS

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KNIGHTS OF COLUMBUS

1 COLUMBUS PLAZA, NEW HAVEN CT 06510

Membership Document

A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

1	COUNCIL NUMBER 17690	COUNCIL LOCATION (CITY, ST/PROV) LANCASTER PA	MEMBERSHIP NUMBER 9765432	DATE READ 1/21/09	DATE ELECTED 1/21/09	1ST DEG. DATE
2	TRANSACTION <input type="checkbox"/> NEW MEMBER <input type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REACTIVATION (inactive insurance) <input checked="" type="checkbox"/> READMISSION (up to 7 years) <input type="checkbox"/> REAPPLICATION (over 7 years) <input type="checkbox"/> TRANSFER IN <input type="checkbox"/> HONORARY MEMBERSHIP <input type="checkbox"/> HONORARY LIFE MEMBERSHIP <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> SUSPENSION <input type="checkbox"/> DEATH PROVIDE SURVIVOR INFORMATION BELOW.					
3	LAST NAME: THOMAS FIRST NAME: GEORGE MIDDLE INITIAL: H. TITLE: _____ STREET: 1451 HAM AVE CITY: LANCASTER ST/PROV: PA POSTAL CODE: 08819-2180 COUNTRY (OUTSIDE US): _____ DATE OF BIRTH: 12/15/42 MARITAL STATUS: SINGLE HOME PHONE: (209) 624-9716 BUSINESS PHONE: (209) 477-6179 CELL PHONE: (209) 848-1763 E-MAIL ADDRESS: gthomas@yahoo.com OCCUPATION/EMPLOYER: STOCK BROKER / MERRILL LYNCH LAST FOUR DIGITS OF TAX ID (e.g., SSN): XXXX-5463					
4	ARE YOU A PRACTICAL OR PRACTICING CATHOLIC IN UNION WITH THE HOLY SEE? (SEE DEFINITION ON REVERSE SIDE OF COUNCIL COPY) YES <input checked="" type="checkbox"/> NO <input type="checkbox"/> PARISH NAME, LOCATION (CITY, ST): ST. JOSEPH'S LANCASTER, PA FORMER COLUMBIAN SQUIRE? YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> DID YOU APPLY FOR MEMBERSHIP PREVIOUSLY? YES <input type="checkbox"/> NO <input type="checkbox"/> INITIATION DATES: 1. FIRST: 4/12/81 2. SECOND: 5/4/81 3. THIRD: _____ 4. FOURTH: _____ DATE OF TERMINATION: 12/31/02 REASON: NONPAYMENT OF DUES NUMBER OF LAST COUNCIL: 18000 COUNCIL LOCATION (CITY, ST/PROV): NEW HAVEN, CT					
5	NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE) I am applying for myself <input type="checkbox"/> Yes <input type="checkbox"/> No I am applying for my wife <input type="checkbox"/> Yes <input type="checkbox"/> No					
6	I HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP. PRINTED NAME OF PROPOSER: JOHN J. RICHARDS PROPOSER'S MEMBER NUMBER (required): 9455681			I HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS. I AGREE THAT THE KNIGHTS OF COLUMBUS MAY USE AN OUTSIDE AGENCY TO OBTAIN INFORMATION CONCERNING MY CURRENT ADDRESS. SIGNATURE OF PROPOSER: <i>John J. Richards</i> DATE: 1/21/09 FINANCIAL SECRETARY: <i>Thomas U. Jones</i> SIGNATURES: <i>George Thomas</i> GRAND KNIGHT: <i>Salph P. Simpson</i>		
FAMILY INFORMATION WIFE'S NAME: _____ NAMES AND AGES OF CHILDREN: _____ _____ _____			COMPLETE WHEN REPORTING MEMBER DEATH ONLY. NEXT OF KIN: _____ RELATIONSHIP: _____ STREET: _____ CITY: _____ ST/PROV: _____ POSTAL CODE: _____			
APPLICANT'S INTERESTS/PREFERENCES Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process. <input type="checkbox"/> CHURCH <input type="checkbox"/> COMMUNITY <input type="checkbox"/> COUNCIL <input type="checkbox"/> FAMILY <input type="checkbox"/> YOUTH <input type="checkbox"/> MEMBERSHIP RECRUITMENT/RETENTION Please specify interests: _____						
What do you expect from your membership in the Knights of Columbus? _____ In your opinion, what can you do or contribute to assist in the successful operation of this council? _____						
Date of Interview: _____			Signed: _____			
TRANSACTIONS WITH ANNUITY APP(S) TO GENERAL AGENT			ADMISSION COMMITTEE CHAIRMAN			
ALL OTHER TRANSACTIONS TO SUPREME COUNCIL OFFICE.						

THESE QUESTIONS DO NOT APPLY TO PRIESTS AND RELIGIOUS

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KNIGHTS OF COLUMBUS

1 COLUMBUS PLAZA, NEW HAVEN CT 06510

Membership Document

A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

1	COUNCIL NUMBER 18000	COUNCIL LOCATION (CITY, ST/PROV) NEW HAVEN, CT	MEMBERSHIP NUMBER 4361094	DATE READ 1/12/09	DATE ELECTED 1/12/09	TS/DEB. DATE
2	TRANSACTION <input type="checkbox"/> NEW MEMBER <input type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REACTIVATION (inactive insurance) <input type="checkbox"/> READMISSION (up to 7 years) <input checked="" type="checkbox"/> REAPPLICATION (over 7 years)					
3	TRANSFER IN <input type="checkbox"/> HONORARY MEMBERSHIP <input type="checkbox"/> HONORARY LIFE MEMBERSHIP <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> SUSPENSION <input type="checkbox"/> DEATH *PROVIDE SURVIVOR INFORMATION BELOW					
LAST NAME: JOHNSON FIRST NAME: THOMAS MIDDLE INITIAL: W. TITLE:						
STREET: 171 WHALLEY AVE. CITY: NEW HAVEN ST/PROV: CT POSTAL CODE: 06515-3325 COUNTY (OUTSIDE US):						
DATE OF BIRTH: 5/23/50 MARITAL STATUS: MARRIED HOME PHONE: (203) 998-9123 BUSINESS PHONE: CELL PHONE: (203) 489-2187						
E-MAIL ADDRESS: thomas.johnson@gmail.com OCCUPATION/EMPLOYER: COMPTROLLER/PACKAGES INC. LAST FOUR DIGITS OF TAX ID (e.g., SSN): XXXX-5724						
ARE YOU A PRACTICAL OR PRACTICING CATHOLIC IN UNION WITH THE HOLY SEE? (SEE DEFINITION ON REVERSE SIDE OF COUNCIL COPY) YES <input checked="" type="checkbox"/> NO <input type="checkbox"/> PARISH NAME, LOCATION (CITY, ST): ST. ANN'S WATERBURY, CT FORMER COLUMBIAN SQUIRE? YES <input type="checkbox"/> NO <input checked="" type="checkbox"/>						
DID YOU APPLY FOR MEMBERSHIP PREVIOUSLY? YES <input checked="" type="checkbox"/> NO <input type="checkbox"/> INITIATION DATES: 1. FIRST: 2/1/78 2. SECOND: 3/1/78 3. THIRD: 3/1/78 4. FOURTH:						
DATE OF TERMINATION: 12/31/92 REASON: NONPAYMENT OF DUES NUMBER OF LAST COUNCIL: 15999 COUNCIL LOCATION (CITY, ST/PROV): WATERBURY, CT						
NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE)						
I am applying for myself <input type="checkbox"/> Yes <input type="checkbox"/> No I am applying for my wife <input type="checkbox"/> Yes <input type="checkbox"/> No						
I HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP! PRINTED NAME OF PROPOSER: DONALD M. EVERETT PROPOSER'S MEMBER NUMBER (required): 5579658						
I HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS. I AGREE THAT THE KNIGHTS OF COLUMBUS MAY USE AN OUTSIDE AGENCY TO OBTAIN INFORMATION CONCERNING MY CURRENT ADDRESS. SIGNATURE OF APPLICANT: <i>Thomas Johnson</i> DATE: 1/12/09 FINANCIAL SECRETARY: <i>James P Harlow</i> SIGNATURES: <i>James C Smith</i> GRAND KNIGHT						
FAMILY INFORMATION WIFE'S NAME: ALLISON K. JOHNSON NAMES AND AGES OF CHILDREN: Kyle, 24 THOMAS JR., 20 RACHEL, 18				COMPLETE WHEN REPORTING MEMBER DEATH ONLY. NEXT OF KIN: RELATIONSHIP: STREET: CITY: ST/PROV: POSTAL CODE:		
APPLICANT'S INTERESTS/PREFERENCES Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process.						
<input type="checkbox"/> CHURCH <input checked="" type="checkbox"/> COMMUNITY <input type="checkbox"/> COUNCIL <input checked="" type="checkbox"/> FAMILY <input checked="" type="checkbox"/> YOUTH <input type="checkbox"/> MEMBERSHIP RECRUITMENT/RETENTION						
Please specify interests: Family programs, insurance promotion, youth education						
What do you expect from your membership in the Knights of Columbus? An opportunity to deepen my faith and an improved connection with fellow Catholic men. In your opinion, what can you do or contribute to assist in the successful operation of this council? Act as an appropriate role model/representative for my council and the Order.						
Date of Interview: _____ Signed: _____ ADMISSION COMMITTEE CHAIRMAN						
TRANSACTIONS WITH ANNUITY APP(S) TO GENERAL AGENT. ALL OTHER TRANSACTIONS TO SUPREME COUNCIL OFFICE.						

THREE QUESTIONS DO NOT APPLY TO PRESIDENTS AND RELIGIOUS

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Dues Adjustment Chart
TABLE OF MONTHLY DUES ADJUSTMENT

YEARLY DUES	MONTHLY DUES	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
		1	2	3	4	5	6	7	8	9	10	11	12
\$20.00	\$1.67	1.67	3.33	5.00	6.67	8.33	10.00	11.67	13.33	15.00	16.67	18.33	20.00
21.00	1.75	1.75	3.50	5.25	7.00	8.75	10.50	12.25	14.00	15.75	17.50	19.25	21.00
22.00	1.83	1.83	3.67	5.50	7.33	9.17	11.00	12.83	14.67	16.50	18.33	20.17	22.00
23.00	1.92	1.92	3.83	5.75	7.67	9.58	11.50	13.42	15.33	17.25	19.17	21.08	23.00
24.00	2.00	2.00	4.00	6.00	8.00	10.00	12.00	14.00	16.00	18.00	20.00	22.00	24.00
25.00	2.08	2.08	4.18	6.25	8.32	10.43	12.50	14.57	16.68	18.75	20.82	22.93	25.00
26.00	2.16	2.16	4.35	6.50	8.65	10.85	13.00	15.15	17.35	19.50	21.65	23.85	26.00
27.00	2.25	2.25	4.50	6.75	9.00	11.25	13.50	15.75	18.00	20.25	22.50	24.75	27.00
28.00	2.33	2.33	4.69	7.00	9.31	11.69	14.00	16.31	18.69	21.00	23.31	25.69	28.00
29.00	2.41	2.41	4.86	7.25	9.64	12.11	14.50	16.89	19.36	21.75	24.14	26.61	29.00
30.00	2.50	2.50	5.00	7.50	10.00	12.50	15.00	17.50	20.00	22.50	25.00	27.50	30.00
31.00	2.58	2.58	5.20	7.75	10.30	12.95	15.50	18.05	20.70	23.25	25.80	28.45	31.00
32.00	2.66	2.66	5.37	8.00	10.63	13.37	16.00	18.63	21.37	24.00	26.63	29.37	32.00
33.00	2.75	2.75	5.50	8.25	11.00	13.75	16.50	19.25	22.00	24.75	27.50	30.25	33.00
34.00	2.82	2.82	5.71	8.50	11.29	14.21	17.00	19.79	22.71	25.50	28.29	31.21	34.00
35.00	2.91	2.91	5.88	8.75	11.62	14.63	17.50	20.37	23.38	26.25	29.12	32.13	35.00

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KNIGHTS OF COLUMBUS
1 COLUMBUS PLAZA, NEW HAVEN CT 06510

Membership Document
A CATHOLIC, FAMILY,
FRATERNAL, SERVICE ORGANIZATION

1	COUNCIL NUMBER 18000	COUNCIL LOCATION (CITY, ST/PROV) NEW HAVEN CT	MEMBERSHIP NUMBER 4598478	DATE READ	DATE ELECTED	ST. DEG. DATE
2	TRANSACTION <input type="checkbox"/> NEW MEMBER <input type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REACTIVATION (inactive insurance) <input type="checkbox"/> READMISSION (up to 7 years) <input type="checkbox"/> REAPPLICATION (over 7 years) <input type="checkbox"/> TRANSFER IN <input checked="" type="checkbox"/> HONORARY MEMBERSHIP 3 RD Degree attained <input type="checkbox"/> HONORARY LIFE MEMBERSHIP Degree attained <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> SUSPENSION <input type="checkbox"/> DEATH PROVIDE SURVIVOR INFORMATION BELOW					
3	LAST NAME: WILSON FIRST NAME: SCOTT MIDDLE INITIAL: T. TITLE: STREET: 14 BRIDGE ST. CITY: BRIDGEPORT STATE: CT POSTAL CODE: 06754 COUNTRY (OUTSIDE US): DATE OF BIRTH: MO: 2, DAY: 14, YR: 43 MARITAL STATUS: HOME PHONE: (203) 998-7651 BUSINESS PHONE: CELL PHONE: E-MAIL ADDRESS: Scott.wilson@gmail.com OCCUPATION/EMPLOYER: RETIRED LAST FOUR DIGITS OF TAX ID (e.g., SSN): XXXXX-9756					
4	ARE YOU A PRACTICAL OR PRACTICING CATHOLIC IN UNION WITH THE HOLY SEE? (SEE DEFINITION ON REVERSE SIDE OF COUNCIL COPY) YES NO PARISH NAME, LOCATION (CITY, ST): FORMER COLUMBIAN SQUIRE? YES NO DID YOU APPLY FOR MEMBERSHIP PREVIOUSLY? YES NO INITIATION DATES: 1. FIRST: 3/4/81, 2. SECOND: 3/4/81, 3. THIRD: 5/18/82, 4. FOURTH: DATE OF TERMINATION: REASON: NUMBER OF LAST COUNCIL: COUNCIL LOCATION (CITY, ST/PROV):					
5	NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE) I am applying for myself <input type="checkbox"/> Yes <input type="checkbox"/> No I am applying for my wife <input type="checkbox"/> Yes <input type="checkbox"/> No					
6	I HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP PRINTED NAME OF PROPOSER: PROPOSER'S MEMBER NUMBER (required): 5/15/08			I HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS. I AGREE THAT THE KNIGHTS OF COLUMBUS MAY USE AN OUTSIDE AGENCY TO OBTAIN INFORMATION CONCERNING MY CURRENT ADDRESS. SIGNATURE OF APPLICANT: James P Harlow FINANCIAL SECRETARY: SIGNATURES: GRAND KNIGHT:		
FAMILY INFORMATION WIFE'S NAME: NAMES AND AGES OF CHILDREN:			COMPLETE WHEN REPORTING MEMBER DEATH ONLY. NEXT OF KIN: RELATIONSHIP: STREET: CITY: ST/PROV: POSTAL CODE:			
APPLICANT'S INTERESTS/PREFERENCES Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process. <input type="checkbox"/> CHURCH <input type="checkbox"/> COMMUNITY <input type="checkbox"/> COUNCIL <input type="checkbox"/> FAMILY <input type="checkbox"/> YOUTH <input type="checkbox"/> MEMBERSHIP RECRUITMENT/RETENTION Please specify interests: _____ What do you expect from your membership in the Knights of Columbus? In your opinion, what can you do or contribute to assist in the successful operation of this council? Date of Interview: _____ Signed: _____ ADMISSION COMMITTEE CHAIRMAN						

THESE QUESTIONS DO NOT APPLY TO PRIESTS AND RELIGIOUS

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KNIGHTS OF COLUMBUS

1 COLUMBUS PLAZA, NEW HAVEN CT 06510

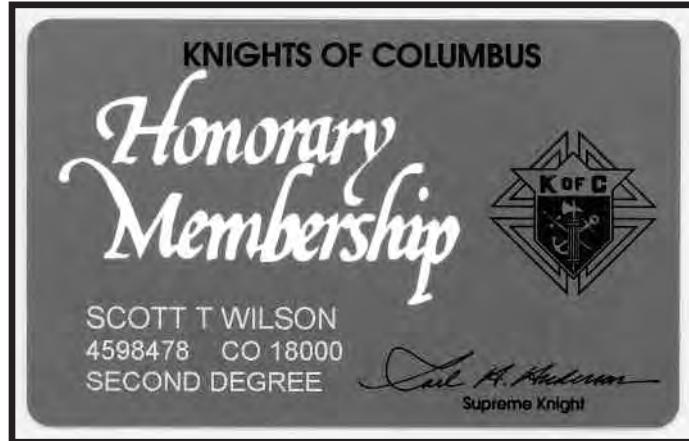
Membership Document

A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

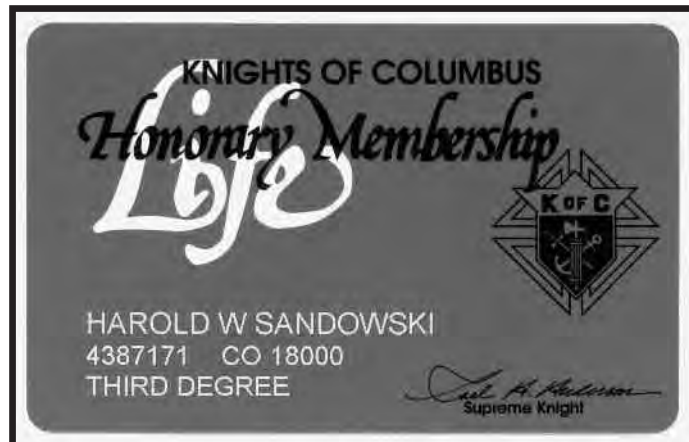
1	COUNCIL NUMBER 18000	COUNCIL LOCATION (CITY, ST/PROV) NEW HAVEN CT	MEMBERSHIP NUMBER 4387171	DATE READ	DATE ELECTED	1ST DEG. DATE
2	TRANSACTION <input type="checkbox"/> NEW MEMBER <input type="checkbox"/> REACTIVATION (inactive insurance) <input type="checkbox"/> TRANSFER IN <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> READMISSION (up to 7 years) <input type="checkbox"/> HONORARY MEMBERSHIP <input type="checkbox"/> SUSPENSION <input type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REAPPLICATION (over 7 years) <input checked="" type="checkbox"/> HONORARY LIFE MEMBERSHIP ^{3RD} <input type="checkbox"/> DEATH <small>PROVIDE SURVIVOR INFORMATION BELOW</small>					
3	LAST NAME: SYLVIA FIRST NAME: TIMOTHY MIDDLE INITIAL: R. TITLE: _____ STREET: 96 LAKE ST. CITY: MILFORD ST/PROV: CT POSTAL CODE: 06541 COUNTRY (OUTSIDE US): _____ DATE OF BIRTH: 3/19/38 MARITAL STA.: _____ HOME PHONE: (203) 698-7875 BUSINESS PHONE: _____ CELL PHONE: _____ E-MAIL ADDRESS: tim.sylvia@hotmail.com OCCUPATION/EMPLOYER: RETIRED LAST FOUR DIGITS OF TAX ID (e.g. SSN): XXXX-9766					
4	*ARE YOU A PRACTICAL OR PRACTICING CATHOLIC IN UNION WITH THE HOLY SEE? (SEE DEFINITION ON REVERSE SIDE OF COUNCIL COPY) YES <input type="checkbox"/> NO <input type="checkbox"/> PARISH NAME, LOCATION (CITY, ST): _____ FORMER COLUMBIAN SQUIRE? YES <input type="checkbox"/> NO <input type="checkbox"/> DID YOU APPLY FOR MEMBERSHIP PREVIOUSLY? YES <input type="checkbox"/> NO <input type="checkbox"/> INITIATION DATES: 1. FIRST: 2/1/80 2. SECOND: 2/10/83 3. THIRD: 2/10/83 4. FOURTH: _____ DATE OF TERMINATION: _____ REASON: _____ NUMBER OF LAST COUNCIL: _____ COUNCIL LOCATION (CITY, ST/PROV): _____					
5	NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE) I am applying for myself <input type="checkbox"/> Yes <input type="checkbox"/> No I am applying for my wife <input type="checkbox"/> Yes <input type="checkbox"/> No					
6	I HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP. PRINTED NAME OF PROPOSER: _____ PROPOSER'S MEMBER NUMBER (req. reqd): 4/18/08			I HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS. I AGREE THAT THE KNIGHTS OF COLUMBUS MAY USE AN OUTSIDE AGENCY TO OBTAIN INFORMATION CONCERNING MY CORRECT ADDRESS. SIGNATURE OF APPLICANT: James P Harlow FINANCIAL SECRETARY: _____ GRAND KNIGHT: _____		
FAMILY INFORMATION			COMPLETE WHEN REPORTING MEMBER DEATH ONLY.			
WIFE'S NAME			NEXT OF KIN			
NAMES AND AGES OF CHILDREN			RELATIONSHIP			
			STREET			
			CITY			
			ST/PROV			
			POSTAL CODE			
APPLICANT'S INTERESTS/PREFERENCES						
Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process.						
<input type="checkbox"/> CHURCH		<input type="checkbox"/> COMMUNITY		<input type="checkbox"/> COUNCIL		
<input type="checkbox"/> FAMILY		<input type="checkbox"/> YOUTH		<input type="checkbox"/> MEMBERSHIP RECRUITMENT/RETENTION		
Please specify interests: _____						
What do you expect from your membership in the Knights of Columbus? _____						
In your opinion, what can you do or contribute to assist in the successful operation of this council? _____						
Date of Interview: _____			Signed: _____			
			<small>ADMISSION COMMITTEE CHAIRMAN</small>			
TRANSACTIONS WITH ANNUITY APP(S) TO GENERAL AGENT. ALL OTHER TRANSACTIONS TO SUPREME COUNCIL OFFICE.						

* THESE QUESTIONS DO NOT APPLY TO PRIESTS AND RELIGIOUS

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HONORARY CARD



HONORARY LIFE CARD

**APPLICATION FOR RELIEF FROM PAYMENT
OF COUNCIL DUES AND SUPREME AND
STATE COUNCIL PER CAPITA TAXES**

I hereby certify that I, Robert Gilson, 25 Hartland St
Name Address

East Haven CT, am a member in good standing of Council No. 18000
and that I am totally disabled and hereby request that I be relieved of payment of all
council dues and Supreme and state council per capita taxes under Section 118(e) of
the Laws of the Order. In support of this request, I submit one of the following as
evidence of my total disability:

- () Certification from Health and Human Services, or
- () Certification from Internal Revenue Service, or
- () Certification from Veterans' Administration, or
- () Certification from attending physician.

Dated 1/17/03

Robert Gilson
Member Signature

CERTIFICATION OF COUNCIL

Council No. 18000

Location New Haven CT

This is to certify that Robert Gilson, 8786566,
Name Membership Number

is a member in good standing in this council and that he has presented evidence of total
disability that warrants consideration for relief from payment of all council dues and
Supreme and state council per capita taxes, under Section 118(e).

Attest: James P Harlow
Financial Secretary

James C. Smith
Grand Knight

Dated 1/17/03

(affix council seal here)

INSTRUCTIONS TO FINANCIAL SECRETARY: Forward completed form with applicant
and officer signatures and accompanying proof of disability to: *Knights of Columbus,
Department of Membership Records, 1 Columbus Plaza, New Haven CT 06510-3326.*

NOTICE: Approval of this application for dues consideration does not have any effect on the waiver of insurance
contributions on an insurance certificate held by the member.

Knights of Columbus

ONE COLUMBUS PLAZA
NEW HAVEN, CONN. 06510-3326

MEMORANDUM

FROM: SUPREME SECRETARY

RE: DISABILITY EXEMPTION GUIDELINES

At the Supreme Council meeting held in Chicago, Illinois, August 5-6-7, 1986, Section 118(e) of the Order's Laws was amended to read as follows:

(e) Any member who is disabled by bodily injuries or disease and is thereby prevented from engaging in any occupation or employment for remuneration or profit and shall have been so prevented for a period of no less than six consecutive months may, on due request in writing to the Supreme Council and upon certification by evidence satisfactory to the Supreme Council of such disability, be relieved from the payment of all council dues and Supreme and state per capita taxes as of the date of approval of said request and any suspension of such member for non-payment of such dues and tax shall cease as of the date of such approval.

Application for relief under Section 118(e) shall be made as follows:

1. The Application, Form 1831, shall be completed by the member and attested to by the grand knight and financial secretary.
2. The application shall be submitted to the Supreme Secretary with one of the following as evidence of total disability:
 - a. Certification from Health and Human Services, or
 - b. Certification from Internal Revenue Service, or
 - c. Certification from Veterans' Administration, or
 - d. Certification from attending physician.
3. The application and supporting evidence shall be considered by a committee comprised of the Supreme Secretary, Supreme Advocate and Supreme Physician. Their decision may be appealed to the Board of Directors by the applicant only.
4. If the application is approved, dues and per capita shall be waived until the following December 31.
5. Application for renewal of relief under Section 118(e) shall be as follows:
 - a. The Supreme Secretary shall provide each council with a list of its members shown on Supreme Council records as exempt from payment of dues and per capita taxes as of October 1 of each year;
 - b. The grand knight and financial secretary shall certify to each member's continuing disability by signing the form;
 - c. The financial secretary shall forward the renewal to the Supreme Secretary;
 - d. Upon receipt of the properly completed form by the Supreme Secretary, he shall continue the dues and per capita waiver under Section 118(e);
 - e. If the grand knight and financial secretary fail to certify the continuing disability of any member within the 90-day period, the waiver of dues and per capita charges shall terminate.
6. Where an application for relief under Section 118(e) is filed on a member duly qualified for recognition as an honorary life member, the Supreme Secretary shall record said application under Section 118(d).
7. Membership that is continued under the provisions of Section 118(e) shall be construed as active membership in computing the membership requirement for recognition as honorary or honorary life membership.
8. Approval of an application for relief under Section 118(e) does not have any affect on waiver of insurance contributions on an insurance certificate held by the member.


KNIGHTS OF COLUMBUS
THIS IS TO CERTIFY THAT

BROTHER Edward Ingals

MEMBER NO. 8875467 IS A **3rd** DEGREE MEMBER OF

COUNCIL NO. 18000 New Haven CT
CITY STATE

DUES PAID TO December 31, 1998



James C. Scott G.K.
James P. Harlow F.S.
Edward Ingals MEMBER SIGNATURE


KNIGHTS OF COLUMBUS
THIS IS TO CERTIFY THAT

BROTHER William Bossman

MEMBER NO. 4321231 IS A **2nd** DEGREE MEMBER OF

COUNCIL NO. 18000 New Haven CT
CITY STATE

DUES PAID TO December 31, 1998



James C. Scott G.K.
James P. Harlow F.S.
William Bossman MEMBER SIGNATURE


KNIGHTS OF COLUMBUS
THIS IS TO CERTIFY THAT

BROTHER John J. Wilson

MEMBER NO. 9854387 IS A **1st** DEGREE MEMBER OF

COUNCIL NO. 18000 New Haven CT
CITY STATE

DUES PAID TO December 31, 1998



James C. Scott G.K.
James P. Harlow F.S.
John J. Wilson MEMBER SIGNATURE

SUPREME COUNCIL
A FRATERNAL BENEFIT SOCIETY
P.O. DRAWER 1670, NEW HAVEN, CONNECTICUT 06507

Part 1A

INSTRUCTIONS — READ CAREFULLY

1. All questions must be answered — Please type or print. Use reverse side where additional space is needed.
2. Claim must consist of the following papers:
 - A. Benefit Certificate (Policy).
 - B. Proof of Death — Claimant's Statement — Part 1A in every case, plus Part 1B in some cases.
 - C. Certified copy of death record or Physician's Statement (Form 261-2). Specific cause of death must be stated in medical terms.
 - D. If Accidental Death Benefit is claimed, a detailed account of the accident (police report, newspaper account, or notarized statement) must accompany the above.
3. Review all answers carefully and see that all necessary papers are attached and transmitted to the Knights of Columbus.
4. TO EXPEDITE CLAIM, ADD ZIP CODE TO ALL ADDRESSES.

The following information is submitted in order to establish a claim under Benefit Certificate(s) issued by the Knights of Columbus and described below. This information is correct to the best of my knowledge. I understand that the furnishing of forms by the Knights of Columbus does not constitute an admission of liability.

Benefit Certificate Number(s) B678973
Council Number 18000 Council Name Holy Family Council

Facts about the Insured:

Name John Andrew Johnson Social Security No. 011-12-4354
 Address 77 Winston Ave Cause of Death Hepatic Coma
 City New Haven State CT Zip 06510 Duration of Illness 6 Hours
 Date of Birth September 15, 1940 Source of Birth Date Birth Certificate
 Date of Death January 11, 1997 Place of Death Residence - 77 Winston Ave

When did insured first consult a physician for last illness? January 10, 1997

Names and addresses of all physicians who attended insured during last three years of life:
Dr. Jonas Jones 143 Bridgeport St New Haven CT 06515
Dr. Harold Swartz 796 Brockton Ave New Haven CT 06511

Was insured ever married? Yes If so, give the following information, as to all marriages:

Name(s) of Spouse(s)	Date(s) of Marriage(s)	Date(s) of Divorce (if applicable)	Date(s) of Spouse(s) Death (if applicable)
<u>Louise P. Johnson</u>	<u>November 15, 1972</u>		

Facts about Claimant

Name Louise P. Johnson Telephone Number (203) 778-6123
 Address 77 Winston Ave Relationship Wife Date of Birth 9 / 22 / 49 /
 City New Haven State CT Zip 06510 Social Security Number 013-19-9987
Area Code Mo. Day Year

If claimant is not beneficiary named by insured, give the following information:

Name of Designated Beneficiary(ies)	Address	Date of Birth	Living or Deceased

Is there more than one beneficiary? Yes List their names, addresses, ages and relationships to insured.

Name	Address	Date of Birth	Relationship
<u>Andrew A. Johnson</u>	<u>77 Winston Ave New Haven CT</u>	<u>3/3/75</u>	<u>Son</u>
<u>Sandra L. Johnson</u>	<u>77 Winston Ave New Haven CT</u>	<u>4/13/77</u>	<u>Daughter</u>

Check one

- Information about alternative settlement options is requested Lump sum settlement requested
 Other (explain) _____

Lump sum settlement will be paid in the absence of any instructions relative to alternate settlement options.

Signature Louise P. Johnson Date 1/25/97

Witness Thomas R. Anderson

If signer is the Guardian, Administrator, Fiduciary or Personal Representative, attach a current certificate of appointment or certified copy.
261-1 2/89

THE FOLLOWING QUESTIONS MUST BE ANSWERED FOR THOSE BENEFIT CERTIFICATES (POLICIES) IN FORCE LESS THAN TWO (2) YEARS AT THE TIME OF THE INSURED'S DEATH

Insured's Name John Andrew Johnson Certificate Number B678973

When was health of insured first affected? December 10, 1995

List names and addresses of all physicians treating insured during the last five (5) years.

Name	Address	Dates of Treatment
<u>Dr. Jonas Jones</u>	<u>143 Bridgeport St New Haven CT 06515</u>	<u>12/10/95</u>
<u>Dr. Harold Swartz</u>	<u>796 Brockton Ave New Haven CT 06511</u>	<u>2/92 to 1/97</u>

To assist the Knights of Columbus to determine eligibility for claim benefits, I authorize any person or organization having knowledge of the insured, including any medical professional, hospital or other medical-care institution, insurance support organization, pharmacy, governmental agency, insurance company, or employer to provide the Knights of Columbus or an agent, attorney, consumer reporting agency or independent administrator, acting on its behalf, information concerning advice, care or treatment provided the above named insured, including information relating to mental illness, use of drugs or use of alcohol.

I understand that such information will be used by the Knights of Columbus for the purpose of evaluating a claim for insurance benefits and that I or any authorized representative will receive a copy of this authorization upon request.

This authorization will remain in force for the duration of the claim.

A photocopy of this authorization shall have the same effect as the original.

Signature Louise P. Johnson Relationship Wife Date 1/25/97

Witness Thomas R. Anderson

(Not to be completed if Claimant is a Beneficiary of Record, Spouse, or Assignee of the entire Death Benefit.)

Knights of Columbus

SUPREME OFFICE

P. O. DRAWER 1670, NEW HAVEN, CONN. 06507

Part 1B
CLAIMANT'S STATEMENT

PROOF OF DEATH

TO EXPEDITE CLAIM, ADD
ZIP CODE TO ALL ADDRESSES.

(Use Reverse Side Where Additional Space Is Needed)

To establish a claim under Death Benefit Certificate(s) No.(s) B678973, issued by the Knights of Columbus, I submit the following additional information, which I warrant to be full and true.

1a. Did insured have any children? Yes. b. If yes, list full name, address and birth date of each surviving child, including legally adopted and step-children.

Full Name	Address	Birth Date
Andrew A. Johnson	77 Winston Ave New Haven CT 06510	March 3, 1975
Sandra L. Johnson	77 Winston Ave New Haven CT 06510	April 13, 1977

c. Did any child of insured die before insured's death leaving surviving children? No. If yes, name each such deceased child and list names, addresses and ages of each such child's children.

If the insured left no surviving spouse, children or grandchildren, answer the following question.

2a. Name of Father of Insured	Address	Living or Deceased
Not applicable		
b. Name of Mother of Insured	Address	Living or Deceased

If the insured is not survived by a spouse, children, grandchildren or parents, answer the following question.

3a. Give name, address and age of each surviving brother or sister (indicate whole or half blood). If none, so state.

Full Name	Address	Age	Whole or Half Blood
Not applicable			

b. Did any brother or sister predecease insured, and leave children surviving? c. If yes, list under the name of each such brother or sister the names, addresses and ages of their surviving children. If none, so state.

Not applicable

If none of the above mentioned relatives survive the insured and if there is no surviving or effectively designated beneficiary of record, the Laws of the Order require distribution of the death benefit to one of the following successive categories: Dependents; Grandparents; Step-father and Step-mother; Daughter-in-law and son-in-law; Father-in-law and mother-in-law; Nieces and nephews; Uncles and aunts; a charitable corporation upon which the insured was dependent; or insured's estate.

4. If claim is made for one of the categories listed in the preceding paragraph, specify here the facts you rely upon to establish such claim.

(If signer is Guardian, Administrator or Fiduciary, state official character)

Dated January 25 19 97

Louis J. Johnson 47
Signature of Claimant Age

Witness Thomas R. Anderson 77 Winston Ave New Haven CT 06510
Address of Claimant

NOTE: Attach certified copies of court appointments of Guardians, Executors, etc., with every claim made in behalf of a minor, decedent's estate, incompetent's estate, etc.

261-1B 5-71

NOTE—Certificates of death will not be accepted in lieu of this form, unless the stated cause of death conforms to the International List of the Causes of Death.

Knights of Columbus

SUPREME OFFICE

P. O. DRAWER 1670, NEW HAVEN, CONN. 06507

Part 2 PHYSICIAN'S STATEMENT

TO EXPEDITE CLAIM, ADD ZIP CODE TO ALL ADDRESSES.

PROOF OF DEATH

NOTE: The Medical certification follows the recommendations of the World Health Assembly made in Geneva on July 24, 1948.
It has been accepted by all States in this country and in Canada.
In the interest of accurate vital statistics, please conform to the International List of the Causes of Death.

Full name of deceased	John Andrew Johnson	Date of death	January 11, 1997
Residence at death	77 Winston Ave New Haven CT 06510	Place of death	77 Winston Ave New Haven (If Hospital or Institution, give name)
Age at death, or date of birth	September 15, 1940		

Cause of death (Enter only one cause for each of a, b and c.) Disease or condition directly leading to death: (This does not mean the mode of dying, such as heart failure, cardiac arrest, etc. It means the disease, injury or complication which caused death.) (a) Hepatic Coma Antecedent causes. (Conditions, if any, giving rise to the above cause, stating the underlying cause last.) Example: a) stroke b) hypertension c) morbid obesity Due to (b) Cirrhosis of the liver Due to (c) Other significant conditions: (Contributing to the death but not related to the disease or condition causing death.)	Interval between onset and death. (a) 6 hours (b) 5 years (c)
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Date of First Attendance in Last Illness	December 10, 1995	Date of Last Attendance in Last Illness	January 10, 1997
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If death was due to accident, suicide or homicide, specify which. Describe briefly.	Was an autopsy performed? If so, by whom and with what findings?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
---	---	---

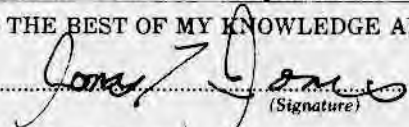
Have you treated or advised the deceased during the last 5 years, prior to last illness? Yes No

Did the deceased, to your knowledge, receive treatment during the last 5 years from any other physician, or in any Hospital or Institution? Yes No

If Yes to either question, please furnish the following:

Name	Address	Nature of Illness or Injury	Dates
Dr. Harold Swartz	796 Brockton Ave New Haven CT 06511	Physical	July 5, 1996

THESE STATEMENTS ARE TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE AND BELIEF.


 M.D.
 (Signature)

January 25 19 97
 143 Bridgeport St New Haven CT 06515
 (Address)

KNIGHTS OF COLUMBUS
A FRATERNAL BENEFIT SOCIETY
APPLICATION FOR REINSTATEMENT

Contract No. 6543218

Amount Due \$125.00

I hereby apply for reinstatement of the above Contract. For that purpose, I tender the Amount Due and state as follows:

- (a) Within the last five years, no person insured under this Contract has consulted a physician except for routine physical examinations and no person insured under this Contract has been a patient in any hospital.
- (b) There has been no change in any insured's occupation.
- (c) No insured is engaged in aviation except as a passenger on commercial airlines.

If there are any exceptions to (a), (b), or (c), list them below:

I agree that the statements contained in this Application are complete and true to the best of my knowledge and belief and that all exceptions have been fully set forth.

I agree that, if the Knights of Columbus reinstates this Contract, its Incontestability provision shall operate anew from the date of reinstatement as to statements made in this Application.

APPLICATION MUST BE DATED AND SIGNED

February 10, 1997

Date

SUPREME PHYSICIAN'S CERTIFICATE

This Application is hereby

Mary T. Mosco

Signature of Insured (if at least 18)

Richard C. Mosco

Signature of Owner (if other than Insured or if Insured is under 18)

.....
INSTRUCTIONS: Complete and sign both sides of this form. Mail with Amount Due to Knights of Columbus, P.O. Box 1492, New Haven, CT 06506.

KNIGHTS OF COLUMBUS

**1 Columbus Plaza
New Haven, CT 06510-3326**

AUTHORIZATION TO OBTAIN AND DISCLOSE INFORMATION

A) To assist the Knights of Columbus in underwriting an application for insurance, I hereby authorize those persons or organizations listed in section B who possess medical or non-medical information concerning me or my children to permit the Knights of Columbus or its representatives, including consumer reporting agencies, to view, copy, be furnished copy or given details of all such information. In addition to other medical or nonmedical information, this Authorization applies to any information about psychiatric, drug or alcohol abuse treatment. **Please note that the term "non-medical information" consists of information obtained from a consumer investigative report which would pertain to such things as confirmation of age, residence, marital status, employment, information as to character, general reputation, personal characteristics, avocation and mode of living.**

B) Those persons or organizations authorized to disclose information concerning me or my children are: licensed physicians, medical practitioners, hospitals, clinics or other medical or medically related facilities, insurance or reinsurance companies or the Medical Information Bureau.

C) Notwithstanding the provisions of sections A and B of this Authorization, the Medical Information Bureau may release information only to the Knights of Columbus.

D) I also authorize the Knights of Columbus to release any information regarding me, my children or our health to the Medical Information Bureau, to any company to which my application is submitted for reinsurance purposes and to other life insurance companies with whom I have policies or to whom I may apply for insurance, or to whom a claim for benefits may be submitted.

E) I authorize the Knights of Columbus to obtain an investigative consumer report on me. I understand that I may request to be interviewed in connection with the preparation of such a report.

F) This Authorization expires two years from the date shown below unless sooner revoked. A photocopy of this signed Authorization shall have the same validity as the original. I understand that I am entitled to receive a copy of this Authorization.

Signature _____
(Parent if proposed insured is under 18)

(Spouse if Family Rider is applied for)

In presence of:

_____ Date _____

If person signing requests to be interviewed should an investigative consumer report be prepared in connection with the application, please initial here _____.

HOME OFFICE COPY

FREQUENTLY ASKED QUESTIONS

GENERAL

Do I have to submit a Form 100 for an address change, or can I report it online?

The preferred method is to enter this information online through the Member Management program. Please include apartment or building numbers, where applicable.

I am a new financial secretary and am not able to access the Officers Online program on the K of C website. How do I get access to this program?

Contact Customer Service at (800) 524-3611. They will set you up with a user ID and temporary password.

A member contacted me saying that he has not been receiving *Columbia* magazine. What should I do?

Previous issues of *Columbia* may have been “undeliverable,” resulting in a restriction on future mailings. If not, it may be a local postal issue. If restricted, verify the address and notify the Membership Records Department of any changes so that the restriction can be removed. Then request back issues of *Columbia* by contacting either Membership Records or *Columbia* magazine.

On my roster, there is an asterisk preceding the member’s address, and he has not been receiving his mail. What is the problem and what does this asterisk mean?

The asterisk means that the member’s mail has been restricted due to previous mailings being returned as “undeliverable.” If the address is verified by either the member or his council, this restriction will be removed.

A member contacted me to say that his address has been changed to his son’s address. Why?

We receive a listing monthly from the Postal Service of those members who have reported an address change. Under certain conditions, family members with the same prior address are changed as well. If you notice that an address has been changed in error, please report it to us as soon as possible.

What must a council do to get a new financial secretary appointed?

If the financial secretary of record is resigning, he should submit a letter of resignation addressed to the Supreme Knight. If the grand knight and trustees do not wish the financial secretary to be reappointed, they should so indicate on the Evaluation Form #1938.

Upon receipt of the resignation letter or the evaluation form not recommending reappointment, the Supreme Council office will provide the grand knight

with a Nomination Form #103 (to be completed by the grand knight and trustees) and Application Forms #101 (to be completed by the prospective candidates).

Why does an Evaluation Form need to be completed?

The Evaluation Form #1938 advises the Supreme Knight of how effectively the financial secretary is performing his duties. Completed near the end of the financial secretary’s three-year term, this form allows for the grand knight and trustees to recommend/not recommend reappointment.

Will a financial secretary be automatically reappointed if he wishes to remain in the position?

Not necessarily. The Evaluation Form #1938 gives the grand knight and trustees the opportunity to either recommend or not recommend reappointment. If reappointment is recommended, a letter of reappointment will be forwarded to the financial secretary. If the form is not received within 120 days following completion of the financial secretary’s term of office, he will be reappointed automatically.

Why does a financial secretary have to send a letter of resignation if he is at the end of his term?

To confirm that he is leaving office of his own accord. If, after 120 days from the conclusion of his term, a (1) letter of resignation or (2) an evaluation form not recommending reappointment has not been received, the financial secretary will be reappointed automatically.

Is there a special form for resignation?

No. A letter of resignation from the financial secretary addressed to the Supreme Knight should be forwarded to the Financial Secretary Appointments Division.

What is the bonding for financial secretaries and treasurers? How does a council secure it?

Bonding in the amount of \$5,000 is provided for financial secretaries upon appointment. Treasurers are covered upon receipt of an Officer Report. Bonding is on the position, not the person.

Can a council purchase additional bonding? If so, how much does it cost?

Yes. The charge for additional bonding is \$7.00 per thousand of additional insurance. A written request for additional coverage must be made to the Supreme Secretary’s office. The charge for the additional insurance will appear on the next council billing statement

and will be pro-rated as necessary. Bonding begins on March 1 and runs through the end of February.

Is there a limit to the additional bonding a council can purchase?

Yes. Bonding on the financial secretary and treasurer is limited to \$125,000 of total coverage per council, including the provided \$5,000 of coverage on each officer.

How does a council make a claim for bonding coverage?

Claims for bonding coverage are made to the Legal Department who investigates the request and subsequently pays the claim, if deemed appropriate. In order for the bond to be in effect, the past two audits must be on file at the Supreme Council office.

Can the financial secretary serve in another officer position?

Within the council the financial secretary cannot serve in another elected office. There are no limits, however, to his serving in another elected office outside of the council.

Should the financial secretary serve on the council retention committee?

No. The retention committee should include the grand knight, chairman ex officio; membership director; retention chairman; trustees; and proposer, if available.

Why does a financial secretary need to complete a W-9 Request for Taxpayer Identification Number form?

The Request for Taxpayer Identification Number must be on file in the Supreme Council office in order to receive the financial secretary compensation paid by the Supreme Council. In the United States, the Supreme Council will issue a Form 1099-MISC to each financial secretary whose grant exceeds \$599.99. For Canadian councils, a T4A slip will be issued if the grant exceeds \$499.99. The financial secretary must report the grant as income on his tax returns even if it falls below the threshold for issuance of a Form 1099 or a T4A tax slip. He must also report any annual compensation received from the local council on his income tax returns.

What constitutes financial secretary compensation?

From the Supreme Council, paid annually at the end of each calendar year... forty cents for each life insurance certificate registered through the council.

From the local council... an amount equal to not less than eight percent and not more than ten percent (as stated in the council by-laws) of moneys collected

for dues only. The financial secretary is free to waive this compensation at his discretion.

Why can't a student serve as financial secretary of a college council?

At the October 1991 meeting of the Board of Directors, it was voted that new college councils may not be instituted unless a member of the faculty or staff of the school or a permanent member of the local community has agreed to serve in the position of financial secretary. It was further voted that this regulation should also apply to financial secretary reappointments in all college councils. The reason for this regulation is to provide both a consistent point of contact for the state council and the Supreme Council, and to provide the college council with a consistent campus presence. That helps ensure that the council won't have to "start from scratch" at the beginning of a school year if most or all of the student officers have graduated.

Can a grand knight remove a financial secretary from office?

No. Only a state, district or territorial deputy may declare any office in a subordinate council vacant, and only in cases where the officer fails or refuses to perform the duties of his office.

Can a financial secretary order supplies online?

Currently, supplies cannot be ordered online. The Requisition Form #1 should be completed and forwarded by mail or fax to the Supply Department.

How long should I retain council records?

- Current member Form 100s (new members, re-entry transactions for members who did not join through your council originally): **7 years**
- Current member Form 100s (all except above and data changes): **3 years**
- Current member Form 100s (data changes): **verify processing at the Supreme Council office, then destroy**
- Former member Form 100s (all transactions): **verify processing at the Supreme Council office, then destroy**
- Financial and business records (e.g., bank statements, contracts, purchase orders, invoices): **10 years**
- Tax forms: **7 years minimum, 10 years recommended**
- Correspondence and accounting records: **3 years**

In all cases, tax ID numbers—including the last four digits—must be obliterated.

Who initiates a transfer?

When a member is transferring from one council to another, the Form 100 must be filed by the council into which the member is transferring. A member cannot be transferred out of a council.

Which signatures are required on the Form 100?

Signature requirements vary by transaction. Please refer to the chart on page 63 of this handbook.

What does a council do when a member states he has transferred to another council and has a dues arrearage?

A transfer cannot be processed until a Form 100 is submitted by the new council. Prior to that time, the member remains in his former council and dues assessments continue to accrue.

Does a member have to repeat the degrees when re-entering the Order?

Not if he can satisfy the admission committee to that effect. A former member should never be challenged openly regarding what degree he has attained. If there is any doubt on the part of the admission committee, it should be suggested that the member attend the degree(s) to become familiar with the changes that have been made since he received his degrees. In so doing, he is receiving the degrees by observation.

Our grand knight had to resign during the fraternal year. What is the proper way to report the new grand knight's information?

The procedure is the same for any council officer, with the exception of the financial secretary, who is appointed by the Supreme Knight. You can complete a new Officer Report Form 185, including only the information for the position(s) being changed. On the form, be sure to indicate the effective date of the change. The recommended and most convenient method is to report any changes via the online Member Management application.

What are the qualifications for the honorary/honorary life awards?

Both distinctions require 25 consecutive years of service any time during the member's tenure. Thus, the 25 consecutive years can be amassed before a break in service or after. Please remember that automatic awards will only be issued based on consecutive years since the last break in service.

The age requirement for the honorary distinction is 65 years; the honorary life requirement is 70 years.

Honorary life is also awarded to those members who have amassed 50 years of consecutive service, regardless of age. The honorary life distinction is awarded to all priests and religious brothers upon receiving the First Degree of the Order.

I received a letter regarding a person who has applied for insurance coverage but is not yet a member. What should I do?

This situation arises when an applicant purchases insurance under the 90-day membership exclusion and your council number is listed on the insurance application. Under this exclusion the applicant has 90 days in which to join the Knights of Columbus or risk cancellation of any insurance coverage. Thus, when you receive a copy of one of these letters – whether the original was sent to the writing insurance agent or to the applicant – we are asking your cooperation in seeing that a Form 100 Membership Document is forwarded to our office reporting his initiation as soon as possible and within the 90-day period. If the applicant has not received his degree, we would ask that you contact him and the writing agent as soon as possible to arrange for him to receive the First Degree.

How can I receive a copy of my council roster?

Rosters on the Order's website at www.kofc.org are updated weekly and can be accessed by financial secretaries or grand knights. In addition to the current rosters, rosters dated January 1 and July 1 are also available for audit purposes.

Why does the roster show so many members as only having received the First Degree when we know that many are Third Degree members?

In the past the fraternal system did not support storing Second and Third Degree dates. This information was normally retained by the local council. While we now have the capability to store all degree dates, many have never been provided to us. If degree information is known, it should be reported to the Supreme Council office. The easiest way to do so, is to update those fields using the online Member Management application. If an exact date is unavailable, simply report "yes."

Which transactions are considered gains and which are counted as losses for the Service Program Award contest?

New members and re-entries are counted as gains; suspensions and withdrawals are counted as losses. Deaths are not quota losses, and transfers in or out do not count for or against the quotas.

Member billing attempts have been returned to us as undeliverable. How do we proceed with the retention/suspension process?

You must make a good-faith attempt to contact the member, including filing the Notice of Intent to Suspend, as filing that form initiates state council retention efforts. If attempts to contact fail, you can submit a Form 100 for suspension with a notation “unable to contact” listed as the reason.

I submitted withdrawal letters but they were returned with a notation that they appeared to be “form letters.” If a member will not write a letter, why can’t the council write it and have the member sign?

While some decisions regarding withdrawal requests are subjective, the Supreme Council office must be convinced that the member – not the council – initiated the request.

How do I obtain membership numbers and degree dates for members entering my council by transfer or re-entry?

If membership numbers and/or degree dates are not available at the time of application, you can submit the Form 100 without them. Simply include on the form what information you have available. In the case of transfer, this information will usually be provided by us or the former council on the Transfer Account Adjustment Form 142. If not – and in the case of re-entries – check the council roster on the Order’s website. Web-based rosters are updated weekly.

I see a credit on my council statement for \$7.50 (\$5.00) with a name and number for a member that has not applied for re-entry into our council or left our council by suspension or withdrawal some time ago. Why are we receiving this credit?

The member has re-entered the Knights of Columbus through another council. That council was responsible for collecting the re-entry fee, which is passed along to your council by the credit appearing on your monthly statement.

What are inactive members, and why do they appear on my council’s roster?

Inactive members are insurance members in an exit status, either by suspension or withdrawal, and thus are no longer in good standing in the Order. However, because they have in-force Knights of Columbus insurance, they are retained on your rolls to satisfy the requirements mandated by the insurance commissioners in the various jurisdictions we serve. Inactive members are subject to Supreme and state-levied assessments. To help offset these assessments, we credit your account \$9.00 annually for each. The inactive

member will remain in that status until such time as he reactivates his membership in yours or another council or he is no longer insured under a Knights of Columbus policy.

What are the differences between the various forms of re-entry: reinstatement, reactivation, readmission and reapplication?

Full definitions for these four re-entry transactions are found on page 51 of this handbook. However, when reporting a re-entry transaction to the Supreme Council office, the financial secretary shouldn’t be overly concerned with which transaction is appropriate, as the member’s master record at the Supreme Council office shows how he left and how long he has been out of the Order. The system then determines the proper transaction. Just be certain to mark “reinstatement” if the member has paid all arrearages and is entitled to continuous service.

I have received an Account Adjustment for Transfer Form 142. How do I complete it?

Following processing of a transfer application submitted by the new or receiving council, a dues adjustment Form 142 is sent to the former council’s financial secretary, who must enter the amount of his council’s annual dues, the date to which dues were paid and the credit or past due balance amount. The balance is to be calculated as of the last day of the month of transfer as indicated on the Form 142 in the upper right-hand corner. If degree information is missing, the financial secretary should add those dates or the word “yes” in each applicable field. He retains the former council copy and returns the remaining copies to New Haven.

I have been informed of the death of a member but I don’t have the complete date (mm/dd/yyyy) of death. How do I proceed?

The full date of death is necessary for us to process a death transaction. In the United States you can visit the *RootsWeb.com* site on the Internet and click on social security death index. It is free and the social security number is not required to search. Similar websites are available in other countries. Use your favorite search engine to locate one.

Priests are awarded the honorary life distinction upon receiving the First Degree of the Order. Why are permanent deacons not awarded this same distinction?

While deacons are certainly recognized by the Order as belonging to religious communities, the original intent of awarding honorary life to priests was to compensate for the meager salaries common to the priesthood. Normally, permanent deacons are employed full time in other than a religious vocation and with higher

compensation. Thus, permanent deacons are only eligible for the honorary and honorary life distinctions upon satisfying the normal age/years of service requirements.

Why can't the Supreme Council office send the proper number of membership cards to each financial secretary annually, instead of us having to order them?

Councils use different accounting systems. These can require different card formats. Since errors, multiple issues and replacement cards can occur under any system, it is difficult to project the number of blank cards per council. Councils are also expected to recruit new members, adding to the potential count. Thus, the financial secretary is in a better position to estimate the proper number of cards needed.

MEMBER MANAGEMENT/ MEMBER BILLING

Member Management/Member Billing is discussed in the Accounting section of this handbook. Training is also available online at the Order's website – *www.kofc.org*. Click on Reports Online, then Officers Online. After signing on, click on the Member Management tab which will take you to the Welcome page. It is here that you will find information about online training.

Who has access to Member Management/Member Billing?

Member Management: Grand knights and financial secretaries have access to council information; faithful navigators and faithful comptrollers have access to assembly information.

Member Billing: Only financial secretaries have access to council information and faithful comptrollers to assembly information.

Which transactions must still be reported by submission of the proper paper form?

Currently, all transactions except data changes, deaths and officers chosen for the term require submission of a paper form.

When will my new members appear on the database?

Any membership document processed by the Membership Records Department during a given work week will be added to the Member Management/Billing data base on the following Tuesday.

I entered data changes yesterday on Member Management and they are not yet listed on my roster. Why?

Changes reported through Member Management are not entered directly into the client/member record. They must be re-keyed by clerks in Membership Records. Member Management rosters are updated on Tuesdays.

How can I view my council members on one screen?

Due to data base constraints, search results in Member Management and Member Billing will not return a list of all of your members on one screen. You can view all of the members' last names that start with a particular letter by placing that letter followed by an asterisk in the search box.

How do I assess new members or transfers when they appear on my system for the first time?

To assess a new member in your council, you must make adjustment(s) on the Member Ledger. The first adjustment will be the type Dues Assessment. For new members, an additional adjustment is required for Initiation Fee.

Can I print addresses to an envelope rather than to a label?

You will need to use the Data Extract Tool in the Member Management or Member Billing Print Center to create a spread sheet and then create a merge document to generate the envelopes.

What do I do if information doesn't print in the correct location on labels and membership cards?

Our recommendation is to set the Page Scaling option in the Adobe Print dialogue box to the None setting. For membership cards, some users report setting the page scaling to None and selecting the Auto-rotate and Center option. We know of no way to overcome every print issue.

When a member transfers out of my council, his ledger is deleted. How do I know if he had an outstanding balance?

In Member Billing under Member Information there is a Transfers section, which allows you to search using the Transferred Member Ledger. This screen provides the information needed to complete the Transfer Account Adjustment form and allows for clearing any outstanding balances.

Will the new council/assembly be able to see the payment records and notes I've made in the past?

When a member transfers in, only Member Management information on the member will be

available to the new council/assembly. No member billing information is viewable.

I would like to be able to look at the pending assessments/dues bills before printing them to confirm that they are correct. How do I proceed?

The application will not give you the opportunity to view each individual member bill prior to processing the Pending Assessments.

To assure that the assessments will process correctly, after you have generated the assessment (Clicking on the Assess Dues button in the council/assembly dues process or the Assess Other button in the special/miscellaneous process) you should review the amounts on the Pending Assessments screen (Council Ledger/Assessments/Pending Assessments or Assembly Ledger/Assessments/Pending Assessments). If the total properly reflects the amount to be billed (and adjusted), click on the Process Assessments button. If for some reason a member's bill is wrong, an adjustment can be made on the Member Ledger.

I inadvertently assessed dues for the current year, not the new year. How do I back it out?

An assessment can be deleted, if there are no receipt transactions associated with it. Under the Assessment section of the Council/Assembly ledger, click on Assessment History. After searching for the assessment, click on the Assessment Type reference, which is a link to the Assessment Details screen. On the lower right-hand side of this screen, click the Delete checkbox and Delete button.

I posted a special assessment as mandatory. Is there a way of changing it to voluntary?

Yes. You will need to delete the assessment and then re-enter it on the Assess Other screen as a voluntary assessment.

How do I print membership cards for one or a few members?

There are two options in printing cards for a single member. First, in the Member Billing Print Center, under Membership Cards there is the Membership Card Template option, which will allow you to enter the member's information. The second option is to set the Billing Status (on the top of the Member Ledger page) to Dues are Current and set the as of date to an arbitrary value (such as 12-02-2008). When you print membership cards, select the tab that says All Members Whose Dues are Current (instead of the default By Member Type). Set the from and to dates as 12-02-2008 (your arbitrary date) and click on the Print

Cards button. Be sure to re-set the Billing Status and as of values when completed.

LEGAL STATUS OF COUNCILS IN THE UNITED STATES

What is the Knights of Columbus?

The Knights of Columbus is a specially-chartered Connecticut corporation that has no parent companies, no stock, and no subsidiaries. The Knights of Columbus is the world's largest Catholic fraternal service organization. Currently, there are more than 1.8 million members in the United States, Canada, Mexico, the Philippines, Puerto Rico, Cuba, the Dominican Republic, Guam, Poland, Panama, the Virgin Islands, the Bahamas, Guatemala, and Saipan. Founded in 1882, the Knights of Columbus operates through and maintains an active system of local and state councils through which extensive charitable and volunteer programs are conducted.

Is the Knights of Columbus a charity recognized by the Internal Revenue Service ("IRS") under Section 501(c)(3) of the Internal Revenue Code ("IRC")?

No. The Knights of Columbus is a fraternal benefit society recognized under IRC Section 501(c)(8).

Are all Knights of Columbus councils and assemblies in the United States eligible to be recognized under Section 501(c)(8)?

Yes. As a unified corporate entity, the Knights of Columbus encompasses not only the Supreme Council, but all subordinate units (i.e., state councils, local councils, chapters, and assemblies). Accordingly, all subordinate units in the United States may be recognized by the IRS as "fraternal lodges" under Section 501(c)(8). In order to be recognized under Section 501(c)(8), each council, chapter, or assembly must provide its Employer Identification Number (EIN) to the Home Office Legal Department, which in turn will report the EIN to the IRS for inclusion in the Order's group exemption listing.

Are all Knights of Columbus councils and assemblies in the United States exempt from federal taxation?

The Knights of Columbus Supreme Council and its subordinate units in the United States are generally exempt from paying federal income tax on ordinary receipts (e.g., funds received for charitable or fraternal purposes). However, unrelated business income would be subject to federal income taxation. See IRS instructions for Form 990 or Form 990-EZ.

Are Knights of Columbus councils and assemblies exempt from state sales tax?

Generally, state legislatures grant state sales tax exemptions or state or local property tax exemptions only to charitable organizations recognized by the IRS under Section 501(c)(3). Since the Knights of Columbus is not recognized as a charitable organization under Section 501(c)(3), councils and assemblies are not generally eligible for a state sales tax exemption, although the exemption may be available in certain states.

Are donations to Knights of Columbus councils and assemblies deductible on the donor's income tax return?

No. Donations to Knights of Columbus councils and assemblies for fraternal or social purposes are never deductible and most donations for charitable purposes are not deductible. In certain limited circumstances, donations for charitable purposes may qualify for a deduction under IRC Section 170(c)(4), the so-called pass-through charitable donation exemption, provided that the recipient of the donation is recognized as a charitable entity under Section 501(c)(3). Knights of Columbus officers should understand that compliance with Section 170(c)(4) requires the council or assembly to file accurate accounting records with their tax returns in order to permit donors to claim a lawful deduction on their tax returns. See IRS instructions for

Form 990, Form 990-EZ and Schedule A (Form 990, 990-EZ, 990-PF). Donations under IRC Section 170(c)(4) must be reported by filing Form 990 Schedule B. Donations of \$250 or more must be acknowledged as required by IRS publication 1771. Only charitable contributions by individual taxpayers may be claimed as deductions under Section 170(c)(4); non-person taxpayers, such as corporations and partnerships, are not legally permitted to claim a deduction for charitable donations under this provision.

Do councils, assemblies, and home corporations need insurance?

Yes. All councils and assemblies should have adequate liability insurance coverage. The Supreme Council does not provide insurance coverage to councils and assemblies or to home corporations. The Supreme Council has arranged for liability insurance to be purchased by the councils through R.C. Knox & Company of Hartford, Connecticut. Councils should contact their state deputy for information on how to apply. Home corporations that are associated with any Knights of Columbus unit are independent corporate entities and are not covered by council insurance policies. Accordingly, all home corporations (including all building associations) should make arrangements for adequate liability insurance coverage.

**KNIGHTS OF COLUMBUS
INSURANCE**

OUR INSURANCE PROGRAM

The Knights of Columbus, a fraternal benefit society, is incorporated under the laws of the state of Connecticut. The Order is owned, governed and controlled by its members.

The Order is authorized to sell insurance in all states of the United States, Puerto Rico, Virgin Islands, Guam and all provinces of Canada.

Legal reserves are maintained on all forms of benefit certificates.

The Order is required to file with the insurance departments of all states and provinces a detailed annual statement of its operations.

At the end of each three-year period, a thorough examination of the affairs of the Order is made at the Supreme Council office in New Haven, Connecticut, by a staff of examiners appointed by the insurance commissioners of the states. The Canadian Department of Insurance at Ottawa also conducts periodic examinations of the Order's business in Canada.

BEGINNINGS

Different concepts of insurance have been around for a long time. Hundreds of years ago Greek fishermen employed a concept which can be construed as life insurance protection. The agreement was that the total catch of all of the fishing boats would be divided equally among those who participated in the fishing activities, thus assuring that those who were unsuccessful would share in the entire return. In the event an entire ship and crew would be lost, their families would still be protected.

Many years later another concept developed. Upon the death of a member of a particular group, it was not uncommon to "pass the hat" in order to generate some money which could then be given to the widow and family of the deceased. This collection bore no relationship to the needs of the family, and if a succession of deaths occurred in a short span of time, the method resulted in unequal amounts of money being collected and passed on. This concept, while noble in thought, failed.

Later, regular deposits (quarterly, for example) were made to a common fund. Upon the death of a member, withdrawals in specific amounts (\$1,000, for example) were made and turned over to the widow. This plan, again, bore no relationship to the needs of the widow and further placed additional burdens on younger members who, by virtue of their age, would ultimately deposit more to the fund than would older members. For this reason, among others, this concept failed as well.

The need for voluntary, legal reserve, actuarially sound plans became obvious as all other means of supplying protection failed. This resulted in the modern methods and practices of the life insurance industry, of which the Knights of Columbus is a part. Every person should assess his or her needs for protection and apply for coverage based on those needs. Every person then contributes small premiums to a common fund enabling the insurance company to provide substantial protection for the individual with the pooling effect created by hundreds of thousands or even millions of policy holders. Surely the principals of unity and fraternity are put to use in providing this coverage to our members.

CURRENT STATUS

On December 31, 2011 the insurance in force for the Knights of Columbus was recorded at a record \$83.5 billion. During the calendar year 2011, over \$7.9 billion of new insurance was written. This is a tribute to our professionally trained field force of some 136 general agents and approximately 1,350 field agents from throughout the Order whose dedication to service resulted in these fine achievements.

To place these figures in perspective, it is necessary to do two things:

First, we should compare the in-force figure to the same figure of ten years ago. At the end of 2002, the Order had \$45.6 billion of insurance in force. That amount has nearly doubled in one decade. Our total of new insurance written in 2002 was \$4.4 billion. Last year it was \$7.9 billion.

Second, we need to remember that we have accomplished these feats with only one of every three members of the Knights purchasing insurance from the Order.

These statistics, by themselves, show both progress and challenge. Our field force is to be commended for cooperating with our fraternal leaders in promoting the continued growth of the Order's insurance program. It is regrettable, however, that more members do not avail themselves of our greatest fraternal benefit.

At the end of each calendar year a report is published on the status of the Order's insurance program. A copy can be obtained by writing to: **Knights of Columbus, Field Management, 1 Columbus Plaza, New Haven, CT 06510-3326.**

It is strongly suggested that all financial secretaries obtain a copy of the report each year and make the information available to the council membership.

STRUCTURE

The structure of the agency force is simple, yet effective. The general agent is charged with the responsibility of recruiting, training and supervising a given number of field agents in the general agency. A general agency is comprised of approximately 10,000 members, although we do have some smaller and some larger agencies, depending on the territory and the general agent.

With more than 1,800,000 members, our field force is expected to grow to approximately 2,000 agents — one field agent for each 800 members. This will help assure that the benefits of our program are made known to every one of our members. In addition, concentrated coverage of our membership and visibility of our field agents can go a long way toward advancing the insurance program.

PRODUCT

All products that we purchase can fall under one of two categories — demand or non-demand type products. Some examples of demand type products might be automobiles, fuel, household appliances, and any other products that the need for which is obvious. Insurance falls in the other category — non-demand. The needs for life insurance are not as obvious to the average person as, for example, fuel for his automobile. It is a product whose purchase is made with discretionary dollars (those dollars left over after the so-called necessities of life — food, clothing and shelter — are met). There is no question that non-demand type products are much more difficult to sell. Yet, this is the task with which our field agents are confronted. Much service work is associated with the administration of the product over long durations. Remember, life insurance as a contract is probably one of the longest in duration. A home mortgage might run as long as 30 years, but a life insurance contract can run as long as 100 years. To be successful, our agents need the cooperation and support of the home office, the state, district and local officers and our entire membership. Realize, too, that the finances afforded by our insured members support many of our charitable and fraternal activities.

The Knights of Columbus portfolio offers a wide variety of plans designed especially to fill the needs of our brother Knights and their families. The more popu-

lar plans—whole life, term and annuities — are made available in amounts large and small so that members in every age or income category can avail themselves of protection.

SALES AND SERVICE

The most important job our field agents have is to sell adequate life insurance to our members. This is “job one.” But the sale does not end the client/agent relationship. Our field agents are obliged to service the insurance, which many times requires changes as time passes. Changes of beneficiaries, changes of address, loan and surrender requests, changes in plans, etc. are all routinely handled by the field agent. He provides one of the greatest fraternal benefits in which our members can participate. In addition, many of the agents aid and assist local council officers in their membership and other activities.

It has been said many times that our field force is comprised of professional salesmen. With this foremost in mind, should you be aware of any member of the Order who would be interested in a career in insurance sales, we would encourage you to direct him to his general agent. It is without question a career of hard work, but it is also one filled with many rewards . . . both financial and otherwise.

HOW CAN YOU HELP?

You as financial secretary can help promote this important aspect of the Order simply by giving the Knights of Columbus insurance representative in your council as much exposure as possible.

Aggressive promotion of the New Member Annuity Plan would be another plus. This low-cost plan is an ideal way for the new member to become exposed to the insurance aspects of the Order, while at the same time helping your council to attain its insurance quota.

We feel very strongly that positive attitudes by our local, district and state officials contribute substantially to the success of the insurance program. We can all share in the blame when a member passes away leaving his family impoverished. We can all share in the pride of knowing that the widow and children of a brother Knight can continue to live with dignity upon his death. This is precisely what Father McGivney had in mind when he founded his organization.

RECOGNITION

Knights of Columbus

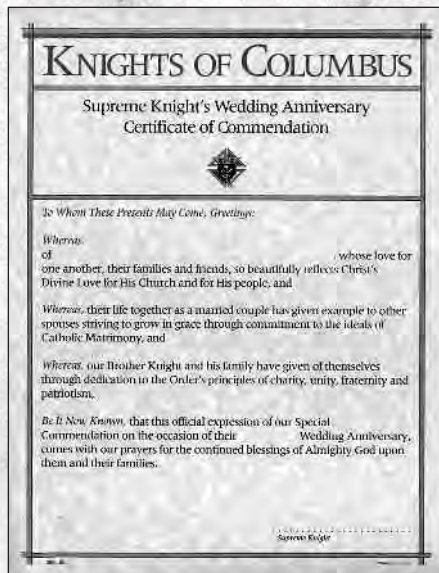
CERTIFICATES



In the Knights of Columbus, fraternal recognition is important to any local or state council's livelihood. Brother Knights deserve to be recognized for their contributions to the Order's growth and their participation in the programs and activities of the Order. Knights of Columbus certificates are a unique way to honor the outstanding accomplishments of deserving members and their families.

The following pages contain information on all of the Third Degree certificates currently available from the Supreme Council office. A sample copy of any certificate is available from the Supreme Council Department of Fraternal Services. Orders for these certificates should be placed with the Supreme Council Supply Department, Department of Fraternal Services or Ceremonials Department as indicated at the following address: 1 Columbus Plaza, New Haven, CT 06510-3326.

SUPREME COUNCIL CERTIFICATES

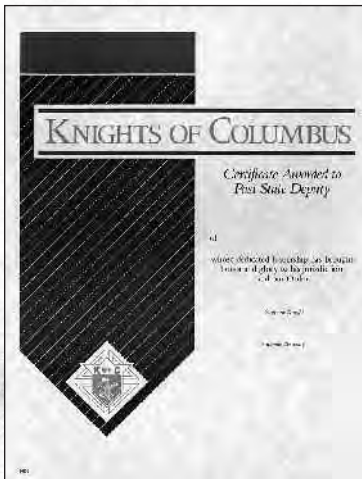


SUPREME KNIGHT'S WEDDING ANNIVERSARY CERTIFICATE OF COMMENDATION—Presented to couples celebrating a wedding anniversary. Proclaims in appropriate resolutions the couple's love and devotion to their family, the Church and the Order. When ordering this certificate, please provide the couple's name, city and state of residence, years of marriage and anniversary date. Each certificate will be personalized at the Supreme Council office and personally signed by the supreme knight. **Requests for this certificate should be made through the Department of Fraternal Services and at least one month prior to the couple's anniversary date.** Available in English, Item #1352; French, #1352F; and Spanish, #1352S. Price: \$1.00. Size: 8½" x 11" vertical.

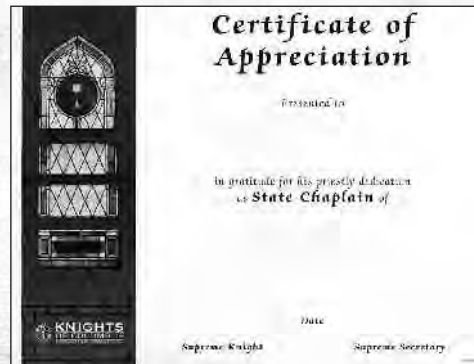


CERTIFICATE OF APPRECIATION—Presented to state council officers, Service Program personnel or other state officials, in "gratitude for his dedication, loyalty and inspirational leadership." Space provided for personalization of the certificate to the honoree. Certificate includes supreme knight's signature. Available in English, Item #1462; French, #1462F; and Spanish, #1462S. Price: 25¢. Size: 8½" x 11" horizontal.

STATE COUNCIL CERTIFICATES



PAST STATE DEPUTY CERTIFICATE—Awarded to past state deputies “whose dedicated leadership has brought honor and glory to his jurisdiction and our Order.” Bears the signatures of the supreme knight and supreme secretary. Available in English, Item #1461; French, #1461F; and Spanish, #1461S. Price: 25¢. Size: 8½” x 11” vertical.



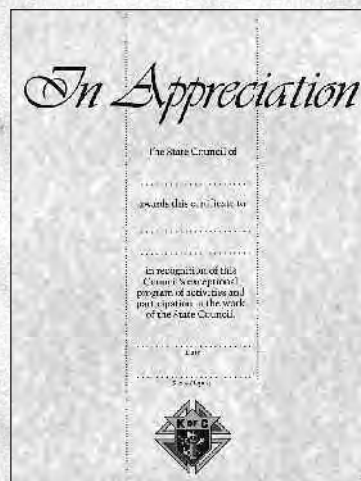
CERTIFICATE OF APPRECIATION—Presented to state chaplain in “gratitude for his priestly dedication.” Includes signatures of supreme knight and supreme secretary. Available in English, Item #1493. Price: 25¢. Size: 8½” x 11” horizontal.



DISTRICT DEPUTY COMMISSION—Presented to district deputies at the beginning of their term in office. Prepared automatically by the Supreme Council Department of Fraternal Services and mailed to the state deputy for presentation. Includes signature of supreme knight and has space for state deputy’s signature. Available in English, Item #1541-nc; French, #1541F-nc; and Spanish, #1541S-nc. Size: 8½” x 11” horizontal.



STATE COUNCIL “IN APPRECIATION” CERTIFICATE (generic version)—Awarded by the state council to any participant “in appreciation for continued support and participation in the program of our state council.” Space provided for signature of state deputy. Available in English, Item #1580; French, #1580F; and Spanish, #1580S. Price: 25¢. Size: 8½” x 11” vertical.

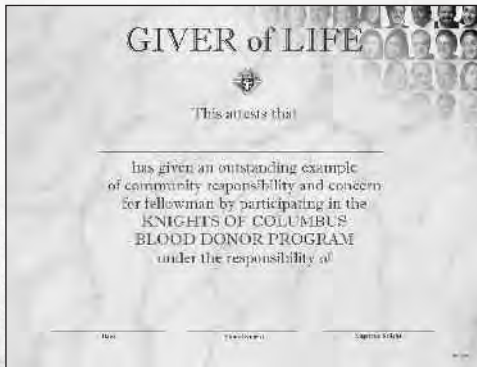


STATE COUNCIL “IN APPRECIATION” CERTIFICATE (Local council version)—Awarded by the state council to a local council “in recognition of its exceptional program of activities and participation in the work of the state council.” Available in English, Item #1581; French, #1581F; and Spanish, #1581S. Price: 25¢. Size: 8½” x 11” vertical.



FORMER DISTRICT DEPUTY CERTIFICATE—Presented to a former district deputy “in appreciation for his faithful, diligent and exemplary service to the Order while serving as District Deputy.” Orders for former district deputy certificates should be placed with the Supreme Council Department of Fraternal Services. Available in English, Item #1858; French, #1858F; and Spanish, #1858S. Price: 25¢. Size: 8½” x 11” vertical.

SPECIAL RECOGNITION CERTIFICATES



GIVER OF LIFE—Presented to blood donors in any council-sponsored blood donor program. Includes signature of supreme knight and provides space for the signature of grand knight. Can be used in conjunction with the “Blood Donor Ident-Card” (Item #1444A-NC, English only.) Available in English, Item #1444; French, #1444F; and Spanish, #1444S. Price: 25¢. Size: 8 1/2” x 11” horizontal



CERTIFICATE OF APPRECIATION—Presented in “Grateful appreciation for outstanding participation in the _____ program sponsored by the Knights of Columbus.” Space provided for signature of presenter. Available in English, Item #1579; French, #1579F; and Spanish, #1579S. Size: 8 1/2” x 11” horizontal.



FAMILY OF THE MONTH—“Awarded to the family of _____ who has served as an inspiration to our parish, community and council by supporting and strengthening Christian Family Life.” Signed by the supreme knight. Space is provided for name of family and grand knight’s signature. Available in English, Item #1843; French, #1843F; and Spanish, #1843S. Price: 25¢. Size: 8 1/2” x 11” vertical.



ALTAR SERVER AWARD—“Presented to _____ in appreciation for _____ years of faithful and devoted service to _____ Parish.” Space provided for signatures of pastor and grand knight. Available in English, Item #1859 (horizontal); French, #1859F; and Spanish (vertical), #1859S. Price: 25¢. Size: 8 1/2” x 11”.



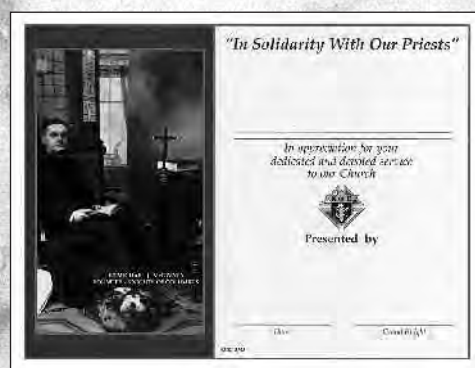
EAGLE SCOUT CERTIFICATE—Presented to scout upon achievement of Eagle Scout rank. Requests for this certificate should be made through the Department of Fraternal Services. Certificate includes signatures of supreme knight and supreme secretary. Available in English, Item #4028. Size: 8 1/2” x 11” horizontal. This is a no charge item.



FAMILY OF THE YEAR—“Awarded to the family of _____ who has served as an inspiration to our parish, community and council by supporting and strengthening Christian Family Life.” Signed by the supreme knight. Space provided for signature of grand knight. Available in English, Item #1843-A; French, #1843-AF; and Spanish, #1843-AS. Price: 25¢. Size: 8 1/2” x 11” vertical.



MARRIAGE RENEWAL CERTIFICATE—Presented to couples celebrating the renewal of their marriage vows. Space provided for the signature of the chaplain/pastor and grand knight. Available in English, Item #2745; French, #2745F; and Spanish, #2745S. Price: 25¢. Size: 8 1/2” x 11” vertical.



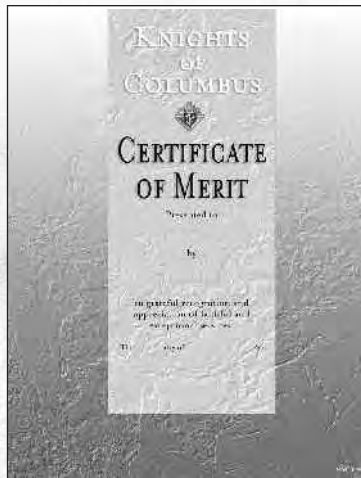
CLERGY APPRECIATION CERTIFICATE—Presented to members of the clergy “in appreciation for his dedicated and devoted service to our Church.” Space provided for signature of the grand knight. Available in English, Item #4362. Price: 25¢. Size: 8 1/2” x 11” horizontal.



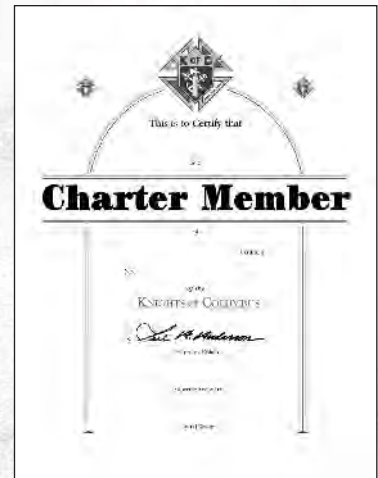
MULTIPURPOSE AWARD—Blank stock award certificate to personalize for any special council program or activity. Available with English emblem only. Item #2898. Price: 25¢. Size: 8 1/2” x 11” horizontal.



PAST GRAND KNIGHT CERTIFICATE—Awarded “In grateful recognition of his leadership” during the fraternal year. Bears signature of supreme knight and supreme secretary. Available in English, Item #1453; French, #1453F; and Spanish, #1453S. Price: 25¢. Size: 8½” x 11” vertical. Wallet size reproduction available in English at no charge — Item #1453A-nc.



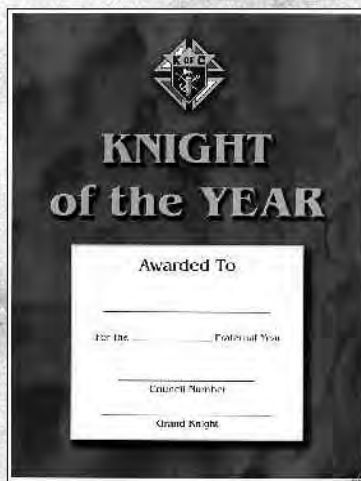
CERTIFICATE OF MERIT—Presented “In grateful recognition and appreciation of faithful and exceptional services.” May be presented to any friend of the Order or participant in council-sponsored program. Space provided for signature of grand knight, program chairman or other council official. Available in English, Item #1454; French, #1454F; and Spanish, #1454S. Price: 25¢. Size: 8½” x 11” vertical.



CHARTER MEMBERSHIP CERTIFICATE—For presentation to charter members of the council. Bears signature of supreme knight and supreme secretary. Space provided for signature of grand knight. Available in English, Item #1456; French, #1456F; and Spanish, #1456S. Price: 25¢. Size: 8½” x 11” vertical. Wallet size reproduction available in English at no charge — Item #1456A-nc.



KNIGHT OF THE MONTH—Space provided for recipient’s name and council number, date of presentation and grand knight’s signature. Available in English, Item #1476; French, #1476F; and Spanish, #1476S. Price: 25¢. Size: 8½” x 11” horizontal.



KNIGHT OF THE YEAR—Space provided for recipient’s name and council number, date of presentation and grand knight’s signature. Available in English, Item #1545; French, #1545F; and Spanish, #1545S. Price: 25¢. Size: 8½” x 11” vertical.



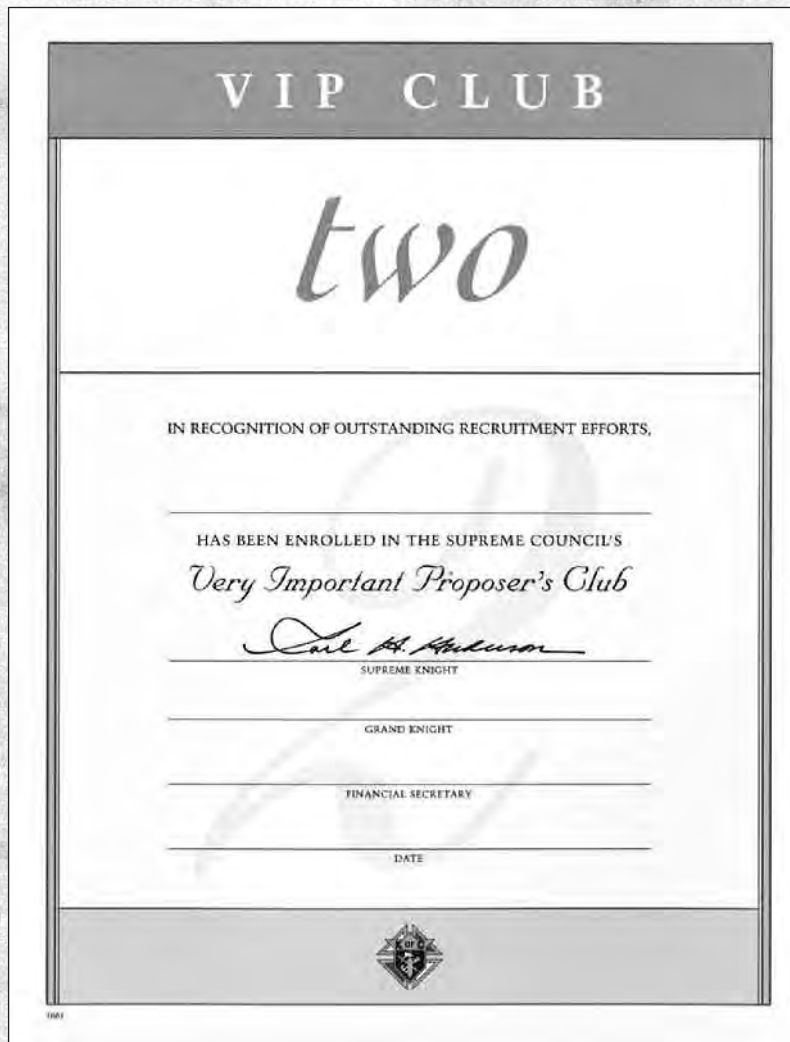
CHAPLAIN’S CERTIFICATE OF APPRECIATION—Presented “in gratitude for his priestly dedication.” Includes signatures of supreme knight and supreme secretary. Available in English, Item #1478; French, #1478F; and Spanish, #1478S. Price: 25¢. Size: 8½” x 11” vertical.

VIP CLUB CERTIFICATES

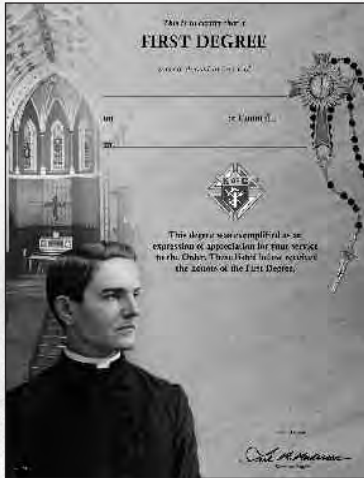
Since February 1, 1974, more than 81,000 Knights of Columbus members have been enrolled in the Supreme Council's "Very Important Proposers" Club. The "VIP" Club is an individual incentive plan aimed at recognizing your ambitious council membership salesmen.

Thirteen different certificates are available for presentation to the "VIP" Club members in your council. Each certificate is inscribed with the individual's name and bears the signature of the supreme knight. The certificate also denotes the level of membership (2, 5, 10, 15, 20, 25, 50, 75, 100, 200, 300, 400, 500) attained by the club member. Space is provided on the certificate for the signature of the council's grand knight and financial secretary.

The certificates cannot be ordered in quantity from the Supreme Council office. Council members are automatically enrolled in the club and advanced to the various levels from information contained in the "proposer" section of the Membership Document, Item #100. The appropriate certificate will be personalized with the club member's name and council number.



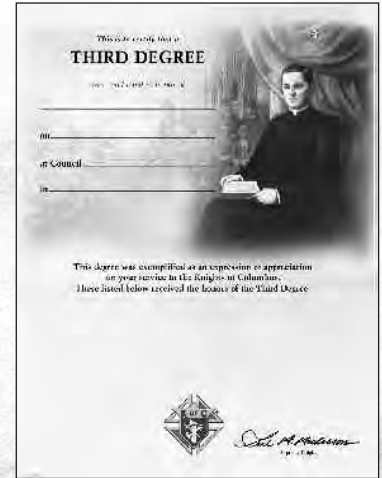
DEGREE EXEMPLIFICATION CERTIFICATES



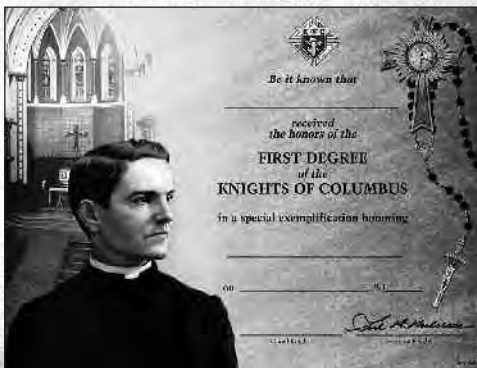
FIRST DEGREE HONOREE SCROLL—Presented in recognition of a First Degree conducted in honor of recipient. Space provided for personalization of the certificate to the honoree, for each member participating in the class and for the signature of the presenter. Available in English, Item #271-nc; French, #271F-nc; and Spanish, #271S-nc. Size: 11" x 14" vertical. This is a no charge item when ordered in reasonable quantities.



SECOND DEGREE HONOREE SCROLL—Presented in recognition of a Second Degree conducted in honor of recipient. Space provided for personalization of the certificate to the honoree, for each member participating in the class and for the signature of the presenter. Available in English, Item #272-nc; French, #272F-nc; and Spanish, #272S-nc. Size: 11" x 14" vertical. This is a no charge item when ordered in reasonable quantities.



THIRD DEGREE HONOREE SCROLL—Presented in recognition of a Third Degree conducted in honor of recipient. Space provided for personalization of the certificate to the honoree, for each member participating in the class and for the signature of the presenter. Available in English, Item #273-nc; French, #273F-nc; and Spanish, #273S-nc. Size: 11" x 14" vertical. This is a no charge item when ordered in reasonable quantities.



FIRST DEGREE—Presented to candidates who have received the honors of the First Degree of the Order. Provides space for name of honoree. Available in English, Item #268; French, #268F; and Spanish, #268S. Price: 25€. Size: 8 1/2" x 11" horizontal.



SECOND DEGREE—Presented to candidates who have received the honors of the Second Degree of the Order. Provides space for name of honoree. Available in English, Item #269; French, #269F; and Spanish, #269S. Price: 25€. Size: 8 1/2" x 11" horizontal.



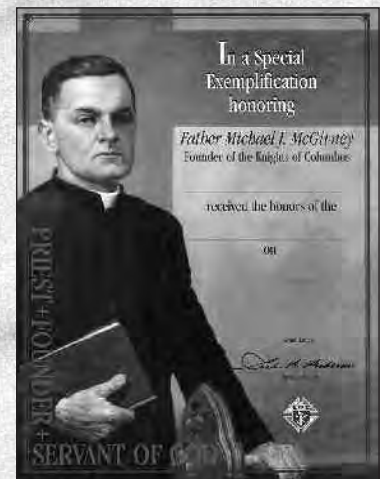
THIRD DEGREE—Presented to candidates who have received the honors of the Third Degree of the Order. Provides space for name of honoree. Available in English, Item #270; French, #270F; and Spanish, #270S. Price: 25€. Size: 8 1/2" x 11" horizontal.



SUPREME KNIGHT'S CEREMONIAL RECOGNITION AWARD—Presented "In acknowledgement of Twenty-Five Years of Service in the Exemplification of the Order's Degrees." **Must be ordered through the Supreme Council Ceremonial Department.** Available in English, Item #CRA-25. Size: 8 1/2" x 11" vertical. This is a no charge item.



SUPREME KNIGHT'S CEREMONIAL RECOGNITION AWARD—Presented "In acknowledgement of Fifty Years of Service in the Exemplification of the Order's Degrees." **Must be ordered through the Supreme Council Ceremonial Department.** Available in English, Item #CRA-50. Size: 8 1/2" x 11" vertical. This is a no charge item.



DEGREE CERTIFICATE IN HONOR OF FATHER MICHAEL J. MCGIVNEY—Presented to members taking any degree of the Order. Signature of the supreme knight provided. Space provided for signature of the grand knight. Available in English, Item #9167; French, #9167F; and Spanish, #9167S. Price: 25€. Size: 8 1/2" x 11" vertical. This is a no charge item.

COUNCIL ANNIVERSARY CERTIFICATES



COUNCIL SILVER ANNIVERSARY CERTIFICATE—Awarded to the council “In grateful recognition of 25 years of service to our Order’s principles.” Prepared automatically by the Supreme Council Department of Fraternal Services approximately one month in advance of anniversary date and forwarded to state deputy for presentation. Available in English, Item #2213; French, #2213F; and Spanish, #2213S. Size: 8½” x 11” vertical. This is a no charge item.



COUNCIL GOLDEN ANNIVERSARY CERTIFICATE—Awarded to the council “In grateful recognition of 50 years of service to our Order’s principles.” Prepared automatically by the Supreme Council Department of Fraternal Services approximately one month in advance of anniversary date and forwarded to state deputy for presentation. Available in English, Item #2214; French, #2214F; and Spanish, #2214S. Size: 8½” x 11” vertical. This is a no charge item.



COUNCIL DIAMOND ANNIVERSARY CERTIFICATE—Awarded to the council “In grateful recognition of 75 years of service to our Order’s principles.” Prepared automatically by the Supreme Council Department of Fraternal Services approximately one month in advance of anniversary date and forwarded to state deputy for presentation. Available in English, Item #2215; French, #2215F; and Spanish, #2215S. Size: 8½” x 11” vertical. This is a no charge item.



COUNCIL HUNDRETH ANNIVERSARY CERTIFICATE—Awarded to the council “In grateful recognition of 100 years of service to our Order’s principles.” Prepared automatically by the Supreme Council Department of Fraternal Services approximately one month in advance of anniversary date and forwarded to state deputy for presentation. Available in English, Item #2211; French, #2211F; and Spanish, #2211S. Size: 8½” x 11” vertical. This is a no charge item.



COUNCIL ANNIVERSARY CERTIFICATE (Generic)—Awarded to the council “In grateful recognition of ___ years of service to our Order’s principles.” Must be ordered through the Supreme Council Department of Fraternal Services. Requests for this certificate should be made at least one month prior to the anniversary date. Available in English, Item #2212; French, #2212F; and Spanish, #2212S. Size: 8½” x 11” vertical. This is a no charge item.

Knights of Columbus

Fourth Degree Certificates



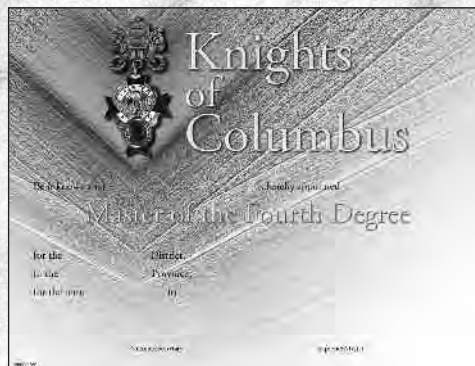
Fourth Degree members give many years of service to their assemblies. Others, though perhaps not as active as some, retain their membership for long periods of time. Whatever the degree of involvement, members who work diligently or who remained with the Order and particularly the Fourth Degree, for many years are deserving of recognition.

There are numerous opportunities for assemblies to promote activities, meetings and special programs or anniversaries to honor members for their achievements. These opportunities for recognition have been expanded with these attractive certificates available for presentation to members in various categories.

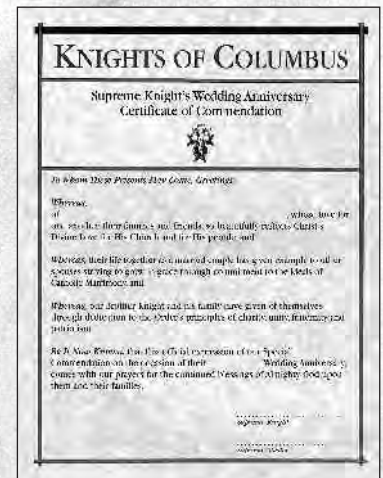
SUPREME ASSEMBLY CERTIFICATES



ASSEMBLY ANNIVERSARY CERTIFICATE (Generic) — Awarded to the assembly "In grateful recognition of _____ years of service to our Order's principles." Certificates for the 25th, 50th, 75th and 100th anniversaries are prepared approximately one month in advance and forwarded to the master for presentation. Other requests must be made through the Department of Fraternal Services at least one month prior to the anniversary date. Available in English, Item #1980; French, #1980F; and Spanish, #1980S. Price: \$1.00. Size: 8 1/2" x 11" vertical.

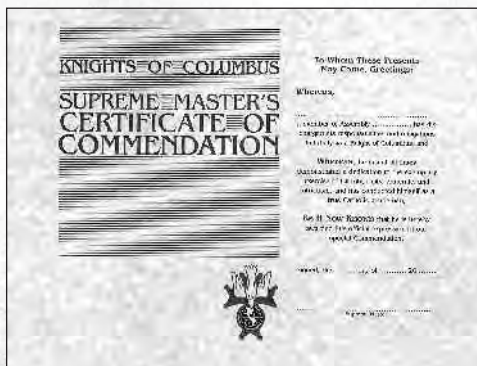


MASTER APPOINTMENT CERTIFICATE — Presented to masters at the beginning of their term in office. Prepared automatically by the Supreme Council Department of Fraternal Services. Item #1999. There is no charge for this item. Size: 8 1/2" x 11" horizontal.



SUPREME KNIGHT'S WEDDING ANNIVERSARY CERTIFICATE OF COMMENDATION — Presented to couples celebrating a wedding anniversary. Proclaims in appropriate resolutions the couple's love and devotion to their family, the Church and the Order. When ordering this certificate, please provide the couple's name, city and state of residence, years of marriage and anniversary date. Each certificate will be personalized at the Supreme Council office and personally signed by the supreme knight and the supreme master. Requests for this certificate should be made through the Department of Fraternal Services and at least one month prior to the couple's anniversary date. Available in English, Item #4334E. Price: \$1.00. Size: 8 1/2" x 11" vertical.

SUPREME ASSEMBLY CERTIFICATES



SUPREME MASTER CERTIFICATE OF COMMENDATION — Presented to any Sir Knight in appreciation for his services. Certificate signed by the supreme master. Available in English, Item #4333. Price: 25¢. Size: 8 1/2" x 11" horizontal.



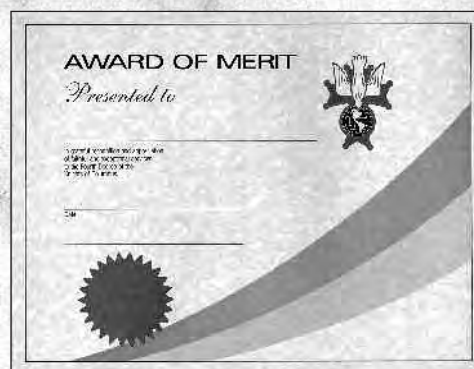
SIR KNIGHT OF THE MONTH CERTIFICATE — Presented to a Sir Knight in appreciation for exceptional service during the month. Available in English. Item #4589. Price: 25¢. Size: 8 1/2" x 11" vertical.



SIR KNIGHT OF THE YEAR — Presented to a Sir Knight in appreciation for exceptional service during the year. Available in English, Item #4590. Price: 25¢. Size: 8 1/2" x 11" vertical.

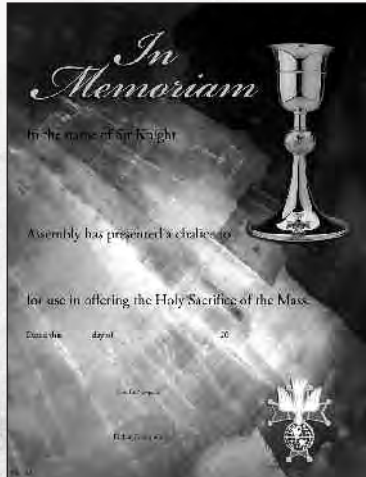


PAST FAITHFUL NAVIGATOR CERTIFICATE — Awarded "In grateful recognition of his leadership during the fraternal year." Includes signature of supreme knight, supreme secretary and supreme master. Available in English, item #1470E; French, #1470F; and Spanish, #1470S. Price: 25¢. Size: 8 1/2" x 11" horizontal.

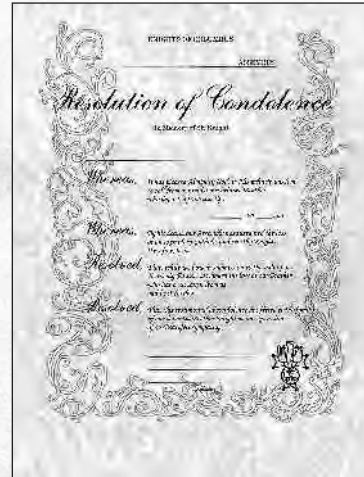


AWARD OF MERIT — Presented "In grateful recognition and appreciation of faithful and exceptional services." May be presented to members of the assembly or to friends of the Order meriting recognition. Space provided for signature of faithful navigator or other assembly official. Available in English, Item #1900; French, #1900F; and Spanish, #1900S. Price: 25¢. Size: 8 1/2" x 11" horizontal.

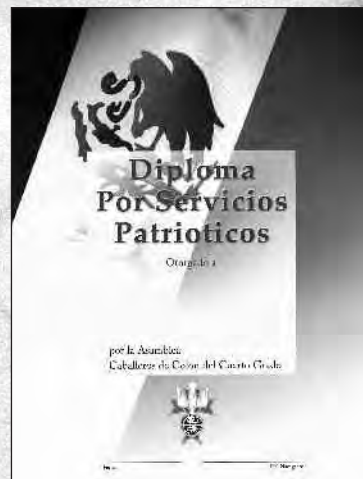
FRATERNAL CERTIFICATES



IN MEMORIAM CERTIFICATE — Commemo-rates the presenta-tion of a chalice by the assembly, in memory of a Sir Knight, for use in offering the Holy Mass. Space provided for signature of faithful navigator and faithful comptroller. Available in English, Item #1455; French, #1455F; and Spanish, #1455S. Price: 25¢. Size: 8½" x 11" vertical.



RESOLUTION OF CONDOLENCE — Present-ed in memory of a brother knight. Space provided for personalization of the resolution and for signature of a committee of brother knights. Available in English, Item #1494; French, #1494F; and Spanish, #1494S. Price: 25¢. Size: 8½" x 11" vertical.



PATRIOTIC SERVICE AWARD — Presented for the promotion of patriotism, patriotic service and the public display of the national flag. Space provided for signniture of faithful navigator. Available in English, Item #839; (US), #839C (Canada), #839P (Philippines); French, #839F (Canada); and Spanish, #839S (Mexico). Price: 25¢. Size: 8½" x 11" vertical.

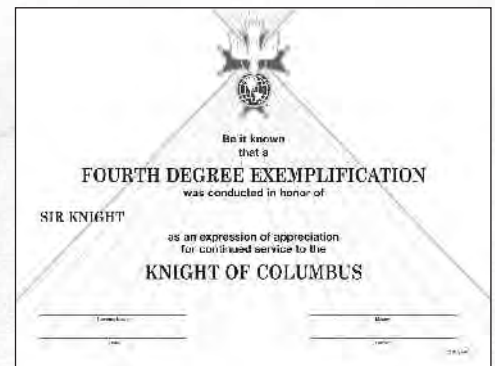
FRATERNAL RECOGNITION CERTIFICATES



FAITHFUL FRIAR CERTIFICATE OF APPRECIATION — Presented “In gratitude for priestly dedication.” Space provided for signature of faithful navigator. Available in English, Item #1441; French, #1441F; and Spanish, #1441S. Price: 25¢. Size: 8½” x 11” horizontal.



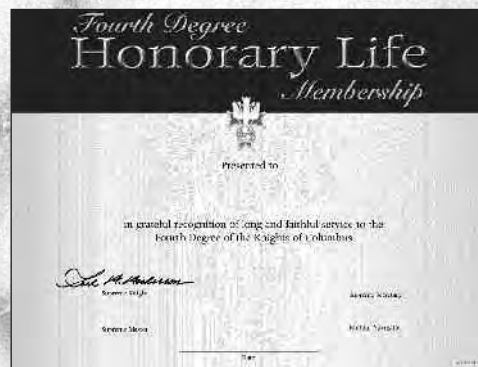
CHARTER MEMBER CERTIFICATE — For presentation to charter members of the assembly. Includes signature of supreme knight, supreme secretary and supreme master. Space provided for signature of faithful navigator. Available in English, Item #1456-4; French, #1456-4F; and Spanish, #1456-4S. Price: 25¢. Size: 8½” x 11” vertical.



FOURTH DEGREE HONOREE CERTIFICATE — Presented in recognition of a Fourth Degree conducted in honor of recipient. Includes signature of supreme master and space for signature of master. Available in English, Item #2703; French, #2703F; and Spanish, #2703S. Price: 25¢. Size: 8½” x 11” horizontal.



YEARS OF SERVICE — Awarded by the assembly to a member for “_____ years of loyal and faithful service.” Space provided for signature of faithful navigator. Available in English, Item #1495; French, #1495F; and Spanish, #1495S. Price: 25¢. Size: 8½” x 11” horizontal.



FOURTH DEGREE HONORARY LIFE CERTIFICATE—Awarded to honorary life members of the Fourth Degree. Bears the signatures of the supreme knight, supreme secretary and supreme master. Provides space for faithful navigator signature. Available in English, Item #4126; French, #4126F; and Spanish, #4126S. Price: 25¢. Size: 8½” x 11” horizontal.



FOURTH DEGREE EXEMPLIFICATION CERTIFICATE— Presented to candidates who have received the honors of the Fourth Degree of the Order. Includes signature of the supreme master. Available in English, Item #1467; French, #1467F; and Spanish, #1467S. Price: 25¢. Size: 8½” x 11” horizontal.

BLACK LEATHERETTE CERTIFICATE FRAME — For 8½” x 11” certificates. Item #1973. Price: \$1.75.

LEATHERETTE CERTIFICATE HOLDER — For 8½” x 11” certificates. Please specify vertical or horizontal. Item #1570-4. Price: \$1.75.