

## INTRODUCTION

The Financial Secretary is responsible for handling membership records and many of the business matters for the lodge.

A lodge may have either a Membership Secretary or a Financial Secretary, but not both. The position that the lodge utilizes must be designated in the bylaws. Which position the lodge chooses affects the responsibilities of the treasurer.

## RESPONSIBILITIES

The Financial Secretary has responsibilities in five areas: Collecting incoming money, helping prepare financial reports, providing membership information, maintaining membership information and ordering membership-related supplies.

### **Collecting All Incoming Money**

The Financial Secretary receives all incoming money for the lodge. The money received comes from two primary sources: Sons of Norway Headquarters and lodge members. Additional payments received from non-members include attendance fees for lodge sponsored events (dinners, classes, special presentations, dances, etc.). The Treasurer should only accept receipts issued by the Financial Secretary.

#### Funds from Sons of Norway Headquarters

##### *Monthly Lodge Dues Report*

To distribute the local lodge portion of dues paid by members during the previous month, Sons of Norway Headquarters sends the Monthly Lodge Dues Report. This report lists the members who joined, renewed or reinstated. The report lists the local lodge portion of the dues for each member along with any application fees or adjustment. For a family membership, only the Primary member in the household is listed.

##### *Annual Lodge Offset Check (Lodge Revenue Sharing)*

During the first quarter of the year the lodge president receives an offset check from Sons of Norway Headquarters. After announcing the amount received and explaining the program at a lodge meeting, the president should give the check to the financial secretary for processing. The amount received is based on the net revenue of Sons of Norway (profitability) and insurance premiums paid by lodge members. Detailed information accompanies the payment.

#### Funds from members and outside sources

For all money received from either a member or an outside source, the Financial Secretary should issue a receipt and turn over the funds to the Treasurer to deposit.

Information about the transaction should be maintained in the records. Typically, the only money collected from members is for special events and programs, annual affiliate membership dues renewal (if collected personally by the lodge), and application fees (one-time payment from new members if required by the lodge). Members are billed annually for renewal by Sons of Norway and send payment directly to Headquarters.

### **Helping to Prepare Financial Reports**

The D17 Financial Statement is an important document summarizing the lodge's fiscal activities during the previous year. Instructions for completing the form, as well as the timeline for submission, is available on the Sons of Norway website. The Financial Secretary should assist in the completion of the report and can electronically sign the document in lieu of the Treasurer along with the President. The Financial Secretary should also be present when the Auditing Committee does their review of the report.

### **Providing Membership Category Information**

Sons of Norway International delegates voted at the 2014 and 2016 International Lodge Meetings to proceed with a simplified dues structure for U.S. members, effective January 1, 2018. Effective January 1, 2020, a simplified dues structure was implemented for members in Canada and Norway.

Membership dues are uniform for all lodges in their respective countries. For all dues paid, a portion is allocated to International, a portion is for the district and a portion is returned back to the local lodge.

### **Membership Categories**

#### *Individual Membership*

An Individual Member pays the full amount for International, district and lodge dues, and receives their own Viking magazine monthly. An Individual adult member can vote, hold office and serve as a convention delegate.

#### *Family Membership*

Family Membership includes everyone who lives at the same single-family residence and shares the same mailing address in the Sons of Norway database. The members do not need to be related. One Viking magazine is sent per household. All members age 16 and above in a Family Membership can vote, hold office, serve as a convention delegate, and are included in the membership count to determine representation for district and international conventions.

#### *Heritage Membership*

Heritage membership is free for youth ages 0-15 who are referred by a relative who is a current member. Heritage members cannot vote or hold office, nor are they included in the lodge membership count. Years as a Heritage member do not count toward Golden Membership or anniversary pins. Resources to recognize years as a Heritage member are available through the Sons of Norway website.

#### *Juvenile Membership*

Juvenile membership is a category for members with a Juvenile insurance policy. They are between the ages of 0 and 21 and are designated on lodge membership lists with a "J." They cannot vote or hold office and are not included in the membership count to determine convention representation.

## **Long-Term Membership Categories**

### *Golden Membership*

A member becomes "Golden" on their renewal date after they have achieved 30 years of membership and 65 years of age. The years of membership do not have to be consecutive. U.S. members who qualified before January 1, 2018 pay a reduced dues rate. Those U.S. members who qualified on January 1, 2018 and after do not receive a discount in their dues.

Members from Canada and Norway who qualified before January 1, 2020 pay a reduced dues rate. Those who qualified on that date and after do not receive a discounted rate.

Golden Members who receive a discount are indicated on the membership lists with the words "Golden Member" or the letters "GM." Golden Members who do not receive the discount are designated by "Golden Member N" or by letters "NG", standing for New Golden.

Golden pins are available for lodges to purchase through the Lodge Supply Store ([Product Results - Sons of Norway Lodge](#)) and certificates can be found on the Sons of Norway website.

### *Life Membership*

Life Members are those who achieved 30 years of membership and 65 years of age before the end of 1998. Life members do not pay dues. They are designated by the letters "LM" or the words "Life Member" on the lists. This membership designation is no longer awarded.

Life Members received a membership card when they first qualified. They do not receive a new card every year.

## **Special Request Categories**

### *Honorary Membership*

Honorary membership is bestowed by the International Board of Directors to nonmembers who have made unique or especially noteworthy contributions to the United States, Canada or Norway, or who have had significant achievements in public service, science, literature or education.

Requests for Honorary Membership may originate from the local lodge, the District or the International Board. Whatever entity submits the request shall pay the honorary member's dues.

### *Affiliate Membership*

Affiliate or dual membership allows people to belong to multiple lodges at the same time. These members pay full dues for their home lodge and only the lodge portion for their affiliate lodge. Their affiliate dues can be included on their annual dues statement or can be collected by the lodge (typically tracked and billed by the lodge Financial Secretary). Unless restricted in the bylaws, an affiliate member can vote on lodge matters and

hold office. They cannot vote on convention delegates to represent their affiliate lodge, nor can they be a convention delegate from their affiliate lodge. They are not included in the lodge membership count. A member may belong to more than one affiliate lodge. Affiliate members appear on their affiliate lodge's membership lists and are included in label orders. They are designated on the membership lists by the district and lodge number on their entry, which is that of their home lodge.

### **Maintaining Membership Records/Membership Lists**

The Financial Secretary should maintain a list of current lodge members. An easy way to accomplish this is to periodically download a membership list, in Excel or PDF format, from the officer's profile page. Lists are not automatically sent from Headquarters. While the PDF list is easier to read, the Excel version can be sorted to develop lists for anniversaries, effective dates, paid to dates, calling and birthdays.

### **Lodge Monthly Activity Report**

The lodge activity report is available to officers through their profile page. This report includes membership activity that occurred during the previous month, such as new members, address changes, deaths, transfers, and suspended/cancelled memberships.

### **Reporting Member Changes**

The Financial Secretary can contact the Fraternal Department by email to [fraternal@sofn.com](mailto:fraternal@sofn.com) to report changes for members, such as new addresses or phone numbers. The Financial Secretary also submits information about members who have transferred into the lodge, or who have passed away.

### **Membership Pins and Certificates.**

Anniversary pins and certificates are available for every 5 years of membership: 5, 10, 15 years and up to 75 years. Each lodge decides which anniversaries will be recognized and how/when to present pins and certificates. The Financial Secretary is responsible for placing the order through the Lodge Supply Store ([Product Results - Sons of Norway Lodge](#)). There is a charge for the anniversary pins, plus shipping.

In addition, there are anniversary certificates available for members achieving a 25, 30, 40, 50, 60 or 70 year anniversary. These certificates are found on the Sons of Norway website.

Heritage Members are not eligible for regular anniversary pins and certificates. There are resources to recognize years of Heritage Membership on the Sons of Norway website.

### **CONCLUSION**

The Financial Secretary serves as an assistant to the Treasurer, collecting all monies Sons of Norway Headquarters, members and other sources. They also provide a vital link between the lodge and Sons of Norway Headquarters to assure that all member information is dependable and accurate.