LODGE PLANNER

Welcome to the online version of the 2026 LODGE PLANNER for lodge Presidents, Financial Secretaries and Corresponding Secretaries.

The format for the online version is different than that of the printed version. We hope you find this format to be user-friendly.

Use the Table of Contents on the next page to navigate through the Planner. Click on the page you want to go to and you will be directed to that page. You can click the link at the bottom of any page to be taken back to the Table of Contents.

Here is a look at what you fill find in each section:

Meeting Resources – There is a Sign-In Sheet, Agenda and a Monthly Ledger. These are generic forms. They are not dated but a blank is provided so you can fill in the date each month. You will need to print them before each meeting.

General Information – The Table of Contents lists each of the items you will find in this section.

Monthly Business – There is a sub-section for each month of the year. When you click on the month it will give you a general idea of important topics that should be discussed or announced at that month's meeting along with flyers that pertain to those items. If your lodge does not meet monthly, please include the information from the other months in your meeting.

Forms – This is where you will find various forms that you need to complete and submit to the Home Office. You will need to print the form, fill it out, make a copy for your records and mail it to the Home Office. These forms also are available as webforms at *hermannsonslife.org/member-benefits/lodges*. When you use this format, the form will be emailed to the Home Office. You may use either format.

Ritual and Bylaws – This is where you will find the Ritual you need to follow during your meetings and the Local Lodge Bylaws that you must use to conduct your lodge's business.

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FORMS

When using a form in this section, you will need to print it, fill it out, make a copy for yourself and mail the form to the Home Office. These forms also are available as webforms at hermannsonslife.org/member-benefits/lodges. When you use this format, the form will be emailed to the Home Office. You may use either format.

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MEETING RESOURCES

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_____ LODGE MEMBER and GUEST SIGN-IN SHEET

_____ 2026

How many hours did this meeting last? _____

		Member	Guest			Member	Guest
1		☐	☐	27		☐	☐
2		☐	☐	28		☐	☐
3		☐	☐	29		☐	☐
4		☐	☐	30		☐	☐
5		☐	☐	31		☐	☐
6		☐	☐	32		☐	☐
7		☐	☐	33		☐	☐
8		☐	☐	34		☐	☐
9		☐	☐	35		☐	☐
10		☐	☐	36		☐	☐
11		☐	☐	37		☐	☐
12		☐	☐	38		☐	☐
13		☐	☐	39		☐	☐
14		☐	☐	40		☐	☐
15		☐	☐	41		☐	☐
16		☐	☐	42		☐	☐
17		☐	☐	43		☐	☐
18		☐	☐	44		☐	☐
19		☐	☐	45		☐	☐
20		☐	☐	46		☐	☐
21		☐	☐	47		☐	☐
22		☐	☐	48		☐	☐
23		☐	☐	49		☐	☐
24		☐	☐	50		☐	☐
25		☐	☐	51		☐	☐
26		☐	☐	52		☐	☐

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AGENDA

_____ 2026

Calling the lodge to order **(President gives one rap of gavel to call members to order.)**

President: **Officers and Members, please come to order and be seated.**

(President gives two raps of the gavel two times for the membership to rise.)

Pledge of Allegiance to the Flag

President: **Face the flag and repeat with me the PLEDGE OF ALLEGIANCE:**
"I pledge allegiance to the flag of the United States of America, and to the Republic for which it stands; One Nation under God, indivisible, with Liberty and Justice for all."

OPTIONAL

President: **Please join me in the PLEDGE TO THE TEXAS FLAG:**
"Honor the Texas flag; I pledge allegiance to thee, Texas, one state under God, one and indivisible."

(The President gives one rap of the gavel for the membership to be seated.)

President: **Officers and Members, let us now proceed with the transaction of business, having in mind only the best interest of this Lodge and Hermann Sons Life. I now declare this meeting opened.**

Roll call of officers

Introduction of Hermann Sons Life officers and guests _____

_____

_____

Reading of the previous meeting minutes by: _____
Motion to accept as read made by: _____ Second made by: _____
☐ Motion passed or ☐ Corrections made and motion passed
Corrections: _____

Financial report given by: _____
Motion to accept report made by: _____ Second made by: _____
☐ Motion passed or ☐ Corrections made and motion passed
Corrections: _____

Announcement of new members and transfers

President: Are there any new members to be introduced?

(Ask new members to stand as the Lodge Secretary reads their names.)

Report of Agents

Call on local agent to give report on membership drives, product changes and educational workshops.

Membership Coordinator Report and Expressions of Condolence:

(President gives two raps of the gavel for the membership to rise.)

President: Please rise and observe a moment of silence in honor of our sick and departed members.

(President gives one rap of the gavel for the membership to be seated.)

Committee Reports:

Reading of Correspondence:

Unfinished Business:

New Business:

Election of Officers: (November or December)

Installation of Officers: (First meeting of the year)

Birthdays: _____

_____

_____

_____

Anniversaries: _____

_____

_____

_____

Attendance Awards: _____

_____

_____

_____

Adjournment:

Motion made by: _____ Second made by: _____

☐ Motion passed

President: **Members, in closing this meeting, may I remind you that we should always be of assistance to members of Hermann Sons Life whereever and whenever possible. Furthermore, we should always show a spirit of benevolence toward everyone, using as a guide our Motto - FRIENDSHIP, LOVE AND LOYALTY.**

I now declare this meeting duly adjourned.

MONTHLY LEDGER for ____________ 2026

This form is to be used by the Financial Secretary

Information on this form should be reported at your meetings.

Do not mail this form to the Home Office. Keep only for your records.

Beginning Book Balance Carried From ____________

Date	Check # or Deposit	Description	Check Withdrawal (-)	✓	Deposit Credit (+)	Balance

Total Checks (Withdrawals)

Total Deposits (Credits)

Book Balance ________ 2026

Complete this portion when your bank statement comes each month
(This will simplify your quarterly financial report)

Beginning bank statement ____________________
Checks (Withdrawals) ____________________
Deposits (Credits) ____________________
Total Bank Statement Balance ____________________

Outstanding Deposits (Credits) ____________________
Outstanding Checks (Withdrawals) ____________________
Total Book Balance Should Match Balance Above ____________________

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GENERAL INFORMATION

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GENERAL GUIDELINES

The following information is provided to help guide lodge officers as they perform their duties in the name of Hermann Sons Life and their lodge. Many of these guidelines have to do with what is known as branding. It is important that we all use the same language and symbols (logos) for our organization when presenting ourselves to non-members. These non-members are potential new members and the proper branding is vital to our efforts to increase membership. We appreciate your help in this endeavor.

NAME OF ORGANIZATION

Our official name is Hermann Sons Life. When you are representing Hermann Sons Life in an official capacity please remember to use the full name. Do not shorten it to Hermann Sons or change it Sons of Hermann. Doing so causes confusion among non-members.

NAME OF YOUR LODGE

The official name of your lodge is Hermann Sons Life (your lodge's name) Lodge.

THE LOGO

Hermann Sons Life Official Logo: HERMANN SONS LIFE Official Icon:

Any use of the logo on printed materials, including shirts, caps, etc. must be approved by the Home Office Communications Department.
Each lodge has its own official logo that includes your name. If you need letterhead, mailing labels, etc. we will provide those for you. If you need your logo for something else, contact the Communications Department and we can provide it to you.

SHARING YOUR NEWS

We encourage you to send news releases to your local newspapers about your meetings and community service projects. Please be careful not to share information that is best not shared with the general public. For example, in most situations you should not share information about members who are on the sick list. This could be considered a breach of privacy. Also, the general public does not need to know about discussions held at meetings about bank transactions, etc. That information is for members only.

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LOCAL LODGE BYLAWS

There exists a set of Local Lodge Bylaws that lodges are required to follow when conducting business in the name of Hermann Sons Life. Those Local Lodge Bylaws are provided for you elsewhere in this Planner. Please note that any changes to your meeting schedule, including day of the week, time and frequency, must be approved by the Home Office prior to the change.

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COMMUNICATING WITH YOUR MEMBERS

Lodges are encouraged to use all means available to them to communicate with their members. If your members are better informed about what is happening with your lodge - when it meets, community service projects, special events, etc. - they are more likely to become engaged. And better engagement can only strengthen your lodge and Hermann Sons Life.

WEBSITE PORTAL

Each lodge has a portal (page) on the Hermann Sons Life website. The portal is a great place to post your lodge's calendar of meeting dates and special activities. The Home Office staff will be managing lodge portals moving forward. Schedules, photos and any other information you want on your lodge's website page should be forwarded to a Member Benefits Representative at *lodge@hermannsonslife.org*.

SOCIAL MEDIA

Social media - Facebook and Instagram - is another great way to communicate with your members and the community in general. You can post information about meetings and other activities. You can also post information and photos about your community service projects. The more we spread the word about Hermann Sons Life, the more the general public will become aware of who we are and the important work that we do in our communities every day. In turn, we hope they will want to become a part of our family.

E-MAIL

Lodges can also use e-mail to communicate with their members. The Home Office is in the process of capturing e-mail addresses for all members so that we can share that information with lodges. E-mail is especially helpful when there has been a change in the schedule and you need to inform members quickly.

POSTCARDS

In the Calendar Planning section you will find instructions on how to prepare postcards that you can send to your members informing them of your calendar for the year and special events. The Home Office will help you do this at no charge to your lodge.

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USING SOCIAL MEDIA

The Home Office is strongly encouraging lodges to create a social media account that can be used to communicate with members and the community-at-large.

Your lodge can utilize social media in many ways but mainly:

- To communicate with your members about upcoming meetings and activities.
- To promote your community service projects.
- To share the messages posted to the Home Office Facebook and Instagram accounts which helps to promote Hermann Sons Life.

To set up an account:

- You will need to designate someone from your lodge to do so. This person should be somewhat familiar with how social media works.
- Create an email address for your lodge. For example: sanantoniolodge@gmail.com (or Yahoo or whatever email provider you wish you to use).
- Use that email address to create a social media account for your lodge. Instructions for setting up an account on both platforms are included on the next seven pages.
- Designate at least two people from your lodge to be administrators on your account. These people will have access to the account and will be responsible for posting and monitoring the account.
- Designate someone from the Home Office (Elaine Soto) as an administrator on your account. This is necessary so that we can help you monitor the account and will provide for continuity if your administrators are no longer willing to carry out that responsibility. The Home Office will need all of the login information for the account, including the email and password.

If you have any trouble setting up the account, contact Hannah Ruiz-Gruver at 210-226-9261, ext. 102, or email hannahrg@hermannsonslife.org.

Once the account has been established it is important that:

- You "like" the Home Office page.
- You invite your friends to "like" the Home Office page.
- You invite everyone to "like" your page.
- You regularly share the posts from the Home Office Facebook and Instagram accounts.

Please keep in mind that any time you are mentioning Hermann Sons Life or your lodge in any way or with any photo, you are representing our organization. Please double-check your posts for positivity, appropriateness, grammar, spelling, accuracy, etc. We want to put our best face forward at all times! The purpose of these accounts is to positively promote Hermann Sons Life – please be sure to monitor posts for negative comments, incorrect information, etc. and answer questions in a timely manner. Remember comments can be deleted if you feel that is necessary.

If you need advice on handling particular questions or comments, please call Communications Director Elaine Soto, ext. 279.

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LODGE SUPPLIES

The Home Office will provide your lodge with letterhead, address labels and cards (birthday, sympathy and get-well). **THERE IS NO CHARGE FOR THESE SUPPLIES.**

To order any of the items on the next three pages, please contact Communications Director Elaine Soto:

By e-mail: elaines@hermannsonslife.org

By phone: 210-226-9261, ext. 279, or 800-234-4124, ext. 279.

By mail: Hermann Sons Life Home Office
P.O. Box 1941
San Antonio, TX 78297
Attn: Elaine Soto

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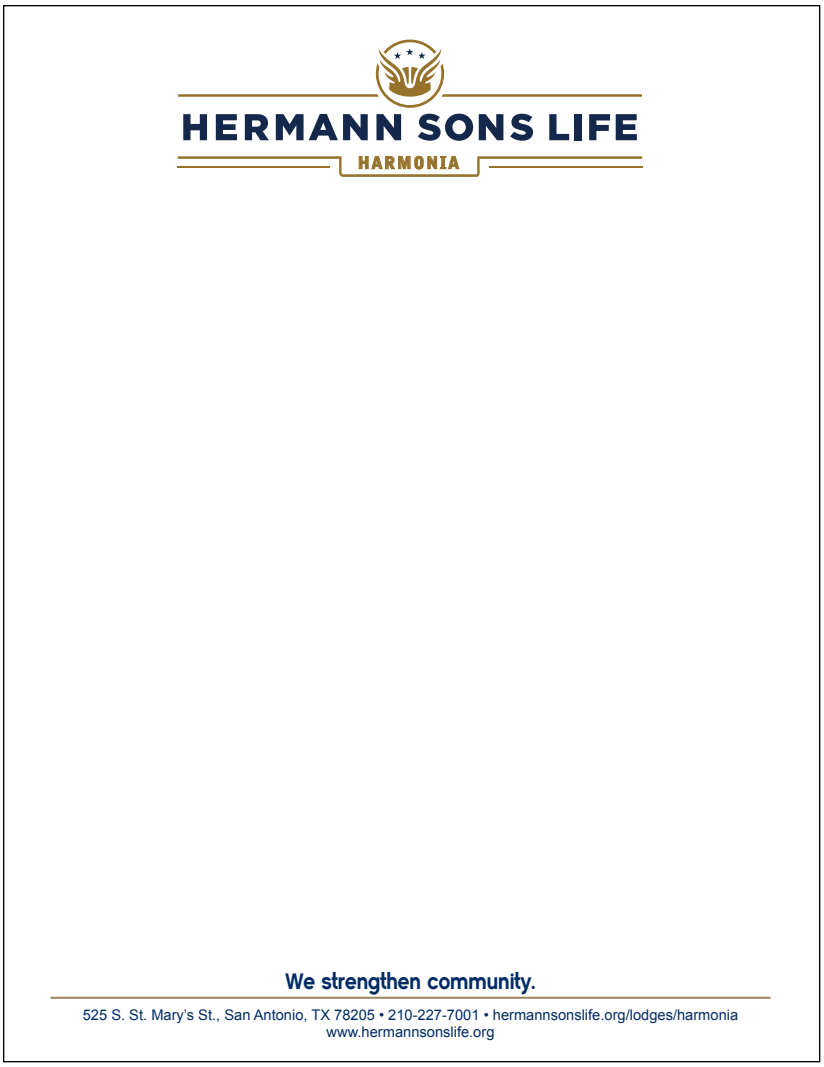
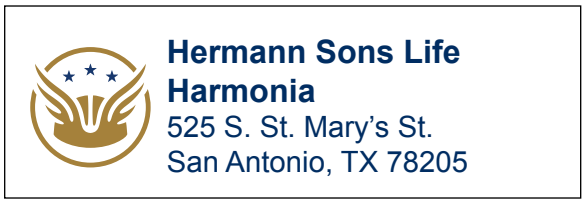
LETTERHEAD AND RETURN ADDRESS LABELS



The letterhead will have your lodge's name at the top and contact information at the bottom. When ordering, please indicate whose contact information you want included, e.g. president or secretary or the lodge's address (if the lodge has an address where it receives mail).



This is a sample of what a return address would look like. When ordering, please indicate the address you want listed. There are 30 labels on each sheet.

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GREETING CARDS

These are fold-over cards. The front of all of the cards is the same.
The helmet icon is centered on the front and printed in full color.
Envelopes are provided.

Hope your birthday
is as special as you are!

From Hermann Sons Life
Your Lodge's Name Here

Inside of the Birthday Card.
Or we can customize the message for your lodge.

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Our thoughts and prayers
are with you during
this difficult time.
May the Lord comfort you
as only He can.

From Hermann Sons Life
Your Lodge's Name Here

Inside of the Sympathy Card.
Or we can customize the message for your lodge.

Hope you are feeling better
with each new day.

From Hermann Sons Life
Your Lodge's Name Here

Inside of the Get-Well Card.
Or we can customize the message for your lodge.

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HELPFUL INFORMATION

This information is for your own records. Please keep this form in this book.
When you leave office, please pass this information to the new officer.

BANK INFORMATION

If you are a new officer, you will need to have your name added to the signature card at the bank.

Checking account

Name of bank _____ Phone No._____ Account No. _____

Savings or CDs

Name of bank _____ Phone No. _____ Account No._____ CD or Savings

Name of bank _____ Phone No. _____ Account No._____ CD or Savings

Federal Tax ID No. _____ Texas Sales Tax ID No. _____

When you want to make a tax-exempt purchase for your lodge you must take the Texas Sales Tax ID Number and the Texas Sales and Use Tax Exemption Certificate with you. A copy of that certificate has been mailed to your lodge's financial secretary. Make copies in case you need more than one for the year. Home Associations are not exempt (only Lodge business).

FOR LODGES THAT DO NOT HAVE A LODGE BUILDING

Meetings are held at _____

Address _____

Contact's Name _____ Phone No._____

FOR LODGES THAT HAVE THEIR OWN HALL

Lodge Hall address _____

Address to which bills are mailed _____

Electric Company

Name_____ Phone No._____ Account No. _____

Water Company

Name_____ Phone No._____ Account No. _____

Phone Company

Name_____ Phone No._____ Account No. _____

Appraisal District (Tax Office)

Office location _____ Phone No._____ Account No. _____

If you have someone mow and maintain property

Name_____ Phone No._____

If you have someone clean your building

Name_____ Phone No._____

If a Hermann Sons Life school of dance meets in your building

Parent Liaison _____ Phone No._____

Who has keys to your building

Name_____ Phone No._____

Name_____ Phone No._____

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SALES TAX EXEMPTION & FUNDRAISING GUIDELINES

Sales Tax Exemption Status on *Purchased Items for the Lodge*: The Lodges are subordinate organizations of Hermann Sons Life. As a subordinate organization, each Lodge is exempt from paying sales tax on its purchase of items which are used exclusively by the Lodge. You should have received a letter from the Texas Comptroller providing documentation of your exemption from the payment of sales tax on items purchased for use by the Lodge. Keep the State Comptroller form in your records. Each time you go to buy something for the Lodge and wish to be exempt from the Texas sales tax on the purchase, you will need to provide the completed tax exemption form to the seller. This should work if you use a Lodge check or personal payment. A copy of the tax exempt form that you need to complete and sign to avoid paying sales tax on the purchased items has been mailed to each lodge's financial secretary.

Fundraiser Guidelines on Collection of Sales Tax on *Items Sold by the Lodge*: Even as a tax exempt organization, each Lodge must follow the state guidelines for the collection of sales tax on the items it sells for fundraisers. Every Lodge is required to collect Texas sales tax and remit the money to the State Comptroller on items it sells to lodge members or to the public. However, exceptions exist and the Lodge should stay within the excepted activities to avoid the requirement to collect and remit sales tax to the Texas State Comptroller.

1. **Meals and Food Product Sales:** Lodges can have as many meals and food product sales as deemed necessary. This would include candy and soft drinks. Below are the regulations set forth by the state to qualify for this exclusion.
    a. The meals are sold and prepared by a member or volunteer of the organization.
    b. The meals are not prepared by a caterer.
    c. The meals are not held in a restaurant, hotel or similar place of business.
    d. The sales are not in competition with an existing business.
    e. All net proceeds from the sale go exclusively to the Lodge.

2. **One-Day Sales:** This would include rummage sales, garage sales, cookbook sales, auctions, etc.
    a. Lodges can have only TWO per calendar year (January-December).
    b. If the Lodge chooses to have a cookbook sale, for example, the day that the cookbooks are delivered and distributed would be the "one day".
    c. Pre-orders should be taken for any products being delivered so that you know how many to order and distribute.
    d. Surplus must be sold that same day or during other one-day fund-raisers.

3. **Vendor and Catalog Sales:** All vendor provided and catalog sales can be done as many times during the year as deemed necessary. The vendor/catalog company will be responsible for collecting sales tax. (You do not want to collect sales taxes, as this will cause each lodge to have to file and handle more paperwork than needed.)

4. **Raffles:** When a Lodge plans to have a raffle the following rules **must** be observed.
    a. The tickets need to include all of the following information.
        i. The name of the organization holding the raffle
        ii. An address either of the lodge hall or lodge officer
        iii. Date of the drawing **(once in print this cannot be changed)**
        iv. Percentage of the proceeds benefiting the Lodge
        v. Items including description and value of each item (if it is more than $10)
        vi. All items printed on the ticket must be in hand before the tickets are printed
        vii. No cash or lottery tickets can be listed
    b. All tickets must be approved by the Home Office prior to printing.

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5. **<u>Reverse Raffles:</u>** When a Lodge plans to have a reverse raffle all of the above rules for a raffle must be observed. The following additional rules **must** also be observed.
   a. A refund of the purchase price of a ticket may be awarded as a raffle prize in a reverse raffle.
   b. After the drawing of tickets in a reverse raffle has begun, the organization conducting the raffle may auction off additional tickets to persons who are present at the drawing for a price other than the price printed on the ticket.
   c. After the drawing of tickets in a reverse raffle has begun, the organization may permit a ticket holder present at the drawing to resell the ticket to another person present for an amount greater than the original purchase price of the ticket. The sale must be made through a designated representative of the organization, and not less than 10% of the sale proceeds must be retained by the organization.
   d. After the drawing of tickets in a reverse raffle has begun, the organization may permit the holder of a previously drawn ticket to:
      i. Purchase additional chances for the ticket to be selected to win a prize.
      ii. Purchase additional tickets for the raffle.
   e. Only the portion of the proceeds from the resale of a ticket under #3 retained by the organization are subject to the statement "All proceeds from the sale of tickets for a raffle must be spent for the charitable purposes of the qualified organization."
   f. All proceeds from the sale of the additional chances for a ticket under #4 are considered to be proceeds from the sale of the ticket for purposes of "All proceeds from the sale of tickets for a raffle must be spent for the charitable purposes of the qualified organization."

If any questions or concerns arise please contact a Member Benefits Representative at 210-226, 9261, ext. 238, or 800-234-4124, ext. 238.

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MONTH TO MONTH BUSINESS

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JANUARY

Besides the usual lodge business, please include the following in your January meeting:

- The 2026 President should install your lodge's officers. Click **here** for the Installation Ceremony.

- Inform your graduating high school seniors of the deadlines for our scholarships. More information can be found **here**.

- Hermann Sons Life Camp registration is open. The information sheet provided **here** will give your members everything they need to know.

- Remind your lodge's finance committee/financial trustees that the financial report for Oct. 1-Dec. 31, 2025 Is due not later than Feb 15. The form is available online and in the 2026 Planner.

- Plan your lodge's calendar for the year. If you would like to have your lodge's calendar printed by the Home Office, see the information sheet in this section. Use the **Yearly Planning Calendar form** in the Forms section or the webform at *hermannsonslife.org/member-benefits/lodges*.

- If your lodge has members who will be receiving membership pins (50-year, 60-year, 70-year, 75-year and 80-year), a list has been mailed to you. Decide in which month you would like to do your pin presentations. Use the **Pin Presentations at Lodge Event form** to let the Home Office know when this will be. It is available in the Forms section or at *hermannsonslife.org/member-benefits/lodges*.

- The Local Lodge Activity Report is due to the Home Office no later than Feb. 14. Now is the time to start working on it. Use the **Local Lodge Activity Report form** that is available in the Forms section or at *hermannsonslife.org/member-benefits/lodges*.

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PRINTED CALENDARS & MEETING REMINDERS

Printed Calendars

Lodges are encouraged to compile a yearly planning calendar and distribute it to all members in attendance, by mail or by email.

Include the dates of all meetings, special activities and community service projects as well as the time and place where meetings are held. You may also want to include information on the meals so members will know if they need to bring food.

And don't forget to send the calendar to new members who are added as the year goes by.

The Home Office will help your lodge put together the calendar. Fill out the Yearly Planning Calendar form in the Forms section and mail it to: Member Benefits Department, Hermann Sons Life Home Office, P.O. Box 1941, San Antonio, Texas 78297-1941 or email the information to *lodge@hermannsonslife.org*. If you have a question, call the Members Benefits Department at 210-226-9261, ext. 238, or 800-234-4124, ext. 238.

The postcard size calendars (5.5 inches x 4.25 inches) can be prepared two ways - to be mailed or to be handed out at meetings.

A sample of how the postcards will look depending on how you plan to distribute them can be found on the next page.

Meeting Reminders

The Home Office also will help you send postcards throughout the year. For example, if your lodge is planning a summer picnic or Christmas party you may want to send a reminder postcard to each household.

Send your information to: Communications Director, Hermann Sons Life Home Office, P.O. Box 1941, San Antonio, TX 78297-1941 or email the information to *elaines@hermannsonslife.org*. If you have a question, call the Communications Department at 210-226-9261, ext. 279, or 800-234-4124, ext. 279.

The information about your event will be printed on one side and the names and addresses of members will be printed on the other side. All you have to do is add postage and mail them.

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FRONT OF POSTCARD THAT WILL BE MAILED.
The member's name and address will be printed on the card along with the name and address of your lodge secretary.
ALL YOU HAVE TO DO IS ADD POSTAGE AND MAIL.

Your Secretary's Name
Lodge Name
Secretary's Address
Secretary's City, State, Zip

Member's Name
(If there is more than one member at an address, they will all be listed here)
Member's Address
Member's City, State, Zip

OR

FRONT OF POSTCARD THAT WILL BE HANDED OUT AT MEETINGS.

LODGE NAME

meets on the *DAY OF THE MONTH* at *TIME OF DAY*
at *LOCATION*.

You are welcome and encouraged to attend all meetings and special events.

If you have questions, contact
LODGE SECRETARY's NAME AND PHONE NO.
For insurance questions, contact agents:
NAME AND PHONE NO. • NAME AND PHONE NO.
or an agent of your choice.

BACK OF POSTCARD WITH MEETING/ ACTIVITY INFORMATION FOR MEMBERS.

LODGE NAME

All meetings are held on the *DAY OF THE MONTH* at *TIME OF DAY*
at *LOCATION* unless otherwise indicated.

DATE	*MEETING INFO*	*DATE*	*SUMMER PICNIC INFO*
DATE	*MEETING INFO*	*DATE*	*MEETING INFO*
DATE	*MEETING INFO*	*DATE*	*MEETING INFO*
DATE	*MEETING INFO*	*DATE*	*MEETING INFO*
DATE	*MEETING INFO*	*DATE*	*MEETING INFO*
DATE	*JOIN HANDS DAY PROJECT*	*DATE*	*MEETING INFO*
DATE	*MEETING INFO*	*DATE*	*CHRISTMAS PARTY INFO*

If you have any questions or suggestions, contact:
President's Name and Phone No.
Secretary's Name and Phone No.

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CAMP REGISTRATION

Registration for members and non-members for the 2026 season opened in November 2025.

Schedule *(subject to change)*

Session 1 – June 7 - 13	• Theme: Neon
Session 2 – June 14 - 20	• Theme: Marvel & Disney
Session 3 – June 21 - 27	• Theme: Halloween
Session 4 – July 5 - 11	• Theme: Red, White & Blue
Session 5 – July 12 - 18	• Theme: Texas
Session 6 – July 19 - 25	• Theme: Christmas in July
Session 7 – July 26 - Aug. 1	• Theme: Hawaiian

Registration software will be utilized and all existing campers who are still camp age will have the information preloaded into the program for ease of transition. Brochures will still be emailed using the email address provided in prior years.

All new campers and members will be mailed camp information and registration instructions.

Registration Fees

Full week for Members: $775

Full week for Non-members: $1,075

CITs: $400

All registration fees include a $20 Camp Store voucher.

PLEASE HELP THE HOME OFFICE KEEP YOUR MEMBERS UP-TO-DATE BY SHARING THIS INFORMATION AT A LODGE MEETING.

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SCHOLARSHIP OPPORTUNITIES

Hermann Sons Life has two scholarship programs
available to graduating high school seniors.

If you know someone who would like to apply, please direct them to the website
for complete details on qualifications and to complete the applications:
www.hermannsonslife.org/member-benefits/scholarships

Deadlines are as follows:

Hermann Sons Youth Camp-Shannon Leigh Gaffney Scholarship
Three $1,000 scholarships presented each year.
Applications must be postmarked by March 1.

Hermann Sons Life Retirement Home Scholarship
Four scholarships will be presented.
Applications must be postmarked by April 1.

**If your lodge offers a scholarship, now would be a good time
to inform members and those eligible to apply
about the guidelines and the deadline.**

You are encouraged to post this flyer or make copies for your members.

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FEBRUARY

Besides the usual lodge business, please include the following in your February meeting:

- Join Hands Day is May 2. Start planning now. Information on the Awards Program is included here. The **form for submitting your project** to the Home Office can be found in the Forms section and at *hermannsonslife.org/member-benefits/lodges/*.

- Remind your graduating high school seniors of the deadlines for our scholarships – March 1 for the Camp Scholarship and April 1 for the Home Scholarship.

- The Hermann Sons Youth Camp-Shannon Leigh Gaffney Scholarship Fund Golf Tournament date is Saturday, June 6. Inform your members who might want to enter and consider a sponsorship from your lodge. More information is available **online**.

- Three important forms need to be completed no later than Feb. 14:
  Local Lodge Activity Report
  Yearly Planner Calendar
  Pin Presentation Form
  All of these forms are available in the Forms section and at *hermannsonslife.org/member-benefits/lodges/*.

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JOIN HANDS DAY - MAY 2, 2026

Join Hands Day is a national day of volunteering sponsored by the American Fraternal Alliance that unites youth and adults in community service efforts in their communities.

Everyone is asked to reach across generations and work with new friends in identifying and fixing problem conditions right where you live. If you are a young person, get involved, develop your leadership skills and help make important decisions affecting your community. If you are an adult, use your abilities to fix local problems, learn to work effectively with young people and show you care.

Lodges will be recognized for sponsoring an event in their communities. In order for the project to be recognized, it must be for the community in general or a community organization. It cannot be for your lodge, a Hermann Sons Life cemetery, Hermann Sons Life Retirement Home, Hermann Sons Life Camp (except for the Grief Support Session) or a Hermann Sons Life School of Dance. All participating lodges that complete the **Join Hands Day Project Report** and submit it to the Home Office by June 6 will be recognized. The form is available in the Forms section and at *hermannsonslife.org/member-benefits/lodges*.

TO RECEIVE AN AWARD A LODGE:

1. Must complete a project for the community in general or a community organization (not Hermann Sons Life related, except where noted above);
2. Complete the Join Hands Day Project Report; and
3. Return the form and photos to the Home Office no later than June 6, 2026. Forms should be mailed to Member Benefits Department, Hermann Sons Life Home Office, P.O. Box 1941, San Antonio, Texas 78297-1941 or emailed to lodge@hermannsonslife.org.

AWARD LEVELS

GOLD PROJECT LEVEL (26-50 VOLUNTEERS)

This level is for lodges that have 26-50 volunteers from the lodge and community members working together to organize an event to benefit the community. Examples of local not-for-profit organizations you may want to work with include: Knights of Columbus, Lions Club, Chamber of Commerce, 4-H, Boy Scouts, Girl Scouts, Garden Club, etc.

You are encouraged to get as many volunteers involved as possible.

Qualifying projects would include: community beautification, community cemetery projects, meals served to benefit a community organization and nursing home projects. In general, the project should be about members providing services to community members.

BLUE PROJECT LEVEL (1-25 VOLUNTEERS)

Projects recognized at this level will be similar to those recognized at the Gold Level but with fewer participants.

BLACK PROJECT LEVEL (DONATIONS OF MONEY AND/OR NON-PERISHABLE GOODS)

This is the donation level. You may collect non-perishable items for your local food bank or make monetary donations to local community organizations.

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MARCH

Besides the usual lodge business, please include the following in your March meeting:

- Join Hands Day is May 2. Have you planned your project?
- Remind your graduating high school seniors that April 1 is the deadline for applications for the Retirement Home Scholarship.
- Remind your members about the Hermann Sons Youth Camp-Shannon Leigh Gaffney Scholarship Fund Golf Tournament. The location is the Golf Club of San Antonio on Saturday, June 6. Inform your members who might want to enter and consider a sponsorship from your lodge. More information is available **online**.
- If your lodge is planning a Matching Funds project, you will need Home Office approval. Information on the program can be found **here**. The **form you need to submit a project** for approval is available in the Forms section. The **final report form** can also be found there. These forms also are available at *hermannsonslife.org*.

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MATCHING FUNDS PROGRAM

Hermann Sons Life lodges are known for their generosity and community service efforts. The Home Office has a Matching Funds Program that rewards local lodges for their fund-raising efforts on behalf of community organizations.

The types of organizations for which a lodge may host or sponsor an event has been expanded. See the new guidelines below. Lodges can still host a Matching Funds event as in the past. However, beginning this year, lodges can instead choose to sponsor an event being held by one of these organizations. The Home Office will reimburse the lodge half but no more than $500 for that sponsorship.

All Hermann Sons Life logos must be provided to the organization by the Home Office Communications Department. All advertising should be provided to the Home Office Communications Department for approval prior to printing by the organization.

The following are the three types of organizations that a lodge can sponsor or host an event for:
501c3: All organizations that qualify for this designation under the IRS law, except for churches, synagogues, mosques or any organizations directly benefitting these types of religious organizations.
501c6: Business associations such as a chamber of commerce. Although they are organized to promote business, they don't generate a profit and don't pay shares or dividends.
501c9: Veterans organizations. These organizations include "a post or organization of past or present members of the United States Armed Forces (USAF), an auxiliary unit or society of such post or organization, or a trust or foundation for such post or organization."

To qualify for Matching Funds:

1. Send the **Matching Funds Reservation Form** to the Home Office by March 31. Remember to include a W-9 Form. The form is available in the Forms section or at *hermannsonslife.org/member-benefits/lodges*.
   Each project must be approved by the Home Office.
3. The lodge will receive a letter of approval or disapproval after April 16.
   Extended guidelines will be sent with the letter.
4. If you are hosting an event, publicize it through whatever community forums are available in your area (newspaper, social media groups, radio, etc.). Social media posts must have appeared on a page that is open to the community, e.g., ask the chosen organization to share the information on its Facebook page or use a community events forum in your area. Social media posts on your own page are encouraged but will not count toward qualification for Matching Funds.

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5. If you are hosting an event, distribute flyers and tickets, if necessary.
6. Complete the **Final Matching Funds Report** along with clippings (other than the *Hermann Sons Life* newspaper) or screenshots of social media posts, copies of flyers and tickets and pictures. The form is available in the Forms section or at *hermannsonslife.org/member-benefits/lodges*.
7. If you hosted an event, the Home Office will send the check in the name of your organization that can be presented along with the funds the lodge raised. If you sponsored an event, the Home Office will mail the check in the name of your lodge.

PLEASE NOTE: As of 2020, lodges are required to submit a W-9 Form from the chosen recipient organization. Most organizations will have this form on file and will simply need to make a copy for you. If you need a blank W-9, you may contact Member Benefits at the Home Office (210-226-9261, ext. 238, or 800-234-4124, ext. 238) and have one e-mailed or mailed.

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APRIL

Besides the usual lodge business, please include the following in your April meeting:

- Join Hands Day is May 2. Are final plans in place for your project?
- Remind your members about the Hermann Sons Youth Camp-Shannon Leigh Gaffney Scholarship Fund Golf Tournament. The location is the Golf Club of San Antonio on Saturday, June 6. Inform your members who might want to enter and consider a sponsorship from your lodge. More information is available **online**.
- Inform members that the Volunteer Work Day at Hermann Sons Life Camp will be held May 2, 2026. They can email *ianb@hermannsonslife.org* if they want to help.
- Your lodge's Finance Committee/Financial Trustees need to meet to audit and complete the NEW Financial Report for Jan. 1-March 31, 2026.

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FINANCIAL REPORT - JAN. 1-MARCH 31, 2026

The **Financial Report form** for the period of Jan. 1-March 31, 2026, is provided in the Forms section and at *hermannsonslife.org/member-bene*fits/lodges/.

It is required that the lodge's **Finance Committee or Financial Trustees audit the books and records** of your lodge. The form should then be completed and signed by the president and financial secretary.

This form must be returned to the Home Office no later than April 16, 2026. As with any form you send to the Home Office, make a copy for your records.

This is done in accordance with the Bylaws of Local Lodges, Section 23, which states, "the Local Lodge Finance Committee shall examine all collections and disbursements by the Lodge . . . and make a written report, upon forms prescribed by the Home Office . . ."

Your prompt attention to this matter is appreciated.

The form should be mailed to:

Member Benefits Department
Hermann Sons Life Home Office
P.O. Box 1941
San Antonio, TX 78297-1941

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MAY

Besides the usual lodge business, please include the following in your May meeting:

- Join Hands Day is May 2. How did your project go? Don't forget to submit the **Join Hands Day report** found in the Forms section or at *hermannsonslife.org/member-benefits/lodges/*.
  It is due June 6.

- Dance recitals are under way. Check the newspaper for a list of recitals in your area and encourage your members to attend.

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JUNE

Besides the usual lodge business, please include the following in your June meeting:

- Don't forget to submit your **Join Hands Day Project Report**. It is due June 6.
- Dance recitals are under way. Check the newspaper for a list of recitals in your area and encourage your members to attend.
- The Hermann Sons Life State Bowling Tournament will be held July 25-26.
  The location is Bowlero Thousand Oaks, 4330 Thousand Oaks Dr., San Antonio. See the information sheet **here** for details.
- Observe Flag Day on June 14. More information is provided **here**.
- If your lodge is located in an area where there is a school of dance, inform your members about registration for the 2026-2026 year. More information is provided **here**.

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HERMANN SONS LIFE

STATEWIDE Bowling TOURNAMENT

JULY 25 - 26 ,2026

BOWLERO THOUSAND OAKS
4330 THOUSAND OAKS DR.
SAN ANTONIO, TX 78217

Call Sandra Jones at 817-781-7155 and she will mail anyone interested in bowling the rules and registration form.

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FLAG DAY - JUNE 14, 2026

Each year, Flag Day is one of the most important dates on the Hermann Sons Life calendar. Lodges are encouraged to observe Flag Day. You may do this in whatever manner you choose. Some lodges hold special ceremonies to which local dignitaries - mayor or county judge - are invited. Others observe the occasion during their June meeting.

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DANCE REGISTRATION

IF YOUR LODGE IS LOCATED IN AN AREA WHERE THERE IS A SCHOOL OF DANCE, PLEASE HELP US KEEP YOUR MEMBERS UP-TO-DATE BY SHARING THIS INFORMATION AT A LODGE MEETING.

Registration for the 2026-2027 dance year will begin in June.

Schools of Dance are open to all junior members and non-members who will be 3 to 17 years of age as of Sept. 1, 2026.

Registration will be held online at https://hermannsonslife.org/member-benefits/dance. Emails will be sent to returning dancers.

Junior members who have turned 3 since Sept. 1 and are now Dance eligible, will be receiving the registration brochure in the mail.

PLEASE NOTE: Registration information that is mailed is sent to the payor of the child's life insurance certificate.

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JULY

Besides the usual lodge business, please include the following in your July meeting:

- The Hermann Sons Life State Bowling Tournament will be held July 25-26 at Bowlero Thousand Oaks, 4330 Thousand Oaks Dr., San Antonio. See the information sheet **here** for details.

- The following forms are required and must be submitted to the Home Office.
  List of Officers for 2026
  Local Lodge Activity Report
  If you have any questions about completing any of these forms, contact the Member Benefits Department at 800-234-4124 or 210-226-9261.

- Your lodge's Finance Committee/Financial Trustees need to meet to audit and complete the NEW Financial Report for April 1-June 30. The **form** is available in the Forms section and at *hermannsonslife.org/member-benefits/lodges*.

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FINANCIAL REPORT - APRIL 1-JUNE 30, 2026

The **Financial Report form** for the period of April 1-June 30, 2026, is provided in the Forms section and at *hermannsonslife.org/member-benefits/lodges*.

It is required that the lodge's **Finance Committee or Financial Trustees audit the books and records** of your lodge. The form should then be completed and signed by the president and financial secretary.

This form must be returned to the Home Office no later than July 15, 2026. As with any form you send to the Home Office, make a copy for your records.

This is done in accordance with the Bylaws of Local Lodges, Section 23, which states, "the Local Lodge Finance Committee shall examine all collections and disbursements by the Lodge . . . and make a written report, upon forms prescribed by the Home Office . . ."

Your prompt attention to this matter is appreciated.

The form should be mailed to:

Member Benefits Department
Hermann Sons Life Home Office
P.O. Box 1941
San Antonio, TX 78297-1941

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AUGUST

Besides the usual lodge business, please include the following in your August meeting:

- Start thinking about who you would like to select as your 2026 Humanitarian of the Year.

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SEPTEMBER

Besides the usual lodge business, please include the following in your September meeting:

- Make a Difference Day is Oct. 24. Time to start planning your project. Click **here** for more information on this important day of service.

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MAKE A DIFFERENCE DAY - OCT. 24, 2026

Make A Difference Day is a day of celebration; a day of doing good. We encourage you and your lodge to join more than 2 million others across our nation in planning and participating in a volunteer service project that will "make a difference" in your community.

Created in 1992 by USA WEEKEND Magazine in partnership with the Points of Light Foundation, Make A Difference Day challenges all of us to spend one Saturday "making a difference" in our communities and in the lives of others by participating in a community service project. The response to Make A Difference Day has soared each year, making it one of the largest volunteer service days nationwide. Mark your calendar for this year's Make A Difference Day, Saturday, Oct. 24.

We hope each and every lodge will participate in a special project in your own community.

If you need help or have any questions feel free to contact a Member Benefits Representative at 210-226-9261 or 1-800-234-4124 or email *lodge@hermannsonslife.org*.

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OCTOBER

Besides the usual lodge business, please include the following in your October meeting:

- Make a Difference Day is Oct. 25. Time to executive your plan.
- If you would like a representative from the Home Office to attend your lodge's Christmas party, please send an invitation as soon as possible. For more information, click **here**.
- It's time to select your lodge's **Humanitarian of the Year Award** recipient. Click **here** for more information. The form you need is in the Forms section and at *hermannsonslife.org/member-benefits/lodges*.
- Your lodge's Finance Committee/Financial Trustees need to meet to audit and complete the **Financial Report for July 1-Sept. 30**.

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REPRESENTATION AT HOLIDAY EVENTS

The holidays are always a busy time for your Home Office representatives. Many lodges host parties in November and December and would like a Home Office representative to attend.

The Home Office always is happy to send a representative to a lodge party or event. Please send a written invitation to the Home Office as soon as possible so assignments can be made accordingly.

If pins are to be presented at this event please submit the Pin Presentation Form found in the Forms section or at *hermannsonslife.org/member-benefits/lodges*.

Invitations can be mailed to:	Hermann Sons Life Home Office P.O. Box 1941 San Antonio, Texas 78297-194 Attn: Member Benefits
Or emailed to:	lodge@hermannsonslife.org

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2026 HUMANITARIAN OF THE YEAR AWARD

It is time for each Hermann Sons Life lodge to select its Humanitarian of the Year. This award honors a volunteer who has given time and talent to your lodge and/or community. All local lodges are asked to select a volunteer (who does not have to be a Hermann Sons Life member) and then recognize this person at a local lodge event. The lodge Christmas party would be an excellent time to do this.

The deadline to select the Humanitarian of the Year is Oct. 1. Please complete the 2026 Humanitarian of the Year Award form found behind the Forms tab of this planner. The report will be reviewed and used to print a certificate with your honoree's name and your lodge information. For all reports received by Oct. 1, the certificate will be mailed by Oct. 12 so that you get it in time for your presentation.

You may also want to send a photo of the award being presented and information about your recipient to your local newspaper.

If you have questions, contact a Member Benefits Representative at 1-800-234-4124, ext. 238, or 210-226-9261, ext. 238.

Email form to:	lodge@hermannsonslife.org
Submit online at:	hermannsonslife.org/local-lodge-activity-report/
Or mail to:	Member Benefits Department Hermann Sons Life Home Office P.O. Box 1941 San Antonio, TX 78297-1941

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FINANCIAL REPORT - JULY 1-SEPT. 30, 2026

The **Financial Report form** for the period of July 1-Sept. 30, 2026, is provided in the Forms section and at *hermannsonslife.org/member-benefits/lodges*.

It is required that the lodge's **Finance Committee or Financial Trustees audit the books and records** of your lodge. The form should then be completed and signed by the president and financial secretary.

This form must be returned to the Home Office no later than Oct. 19, 2026. As with any form you send to the Home Office, make a copy for your records.

This is done in accordance with the Bylaws of Local Lodges, Section 23, which states, "the Local Lodge Finance Committee shall examine all collections and disbursements by the Lodge . . . and make a written report, upon forms prescribed by the Home Office . . ."

Your prompt attention to this matter is appreciated.

The form should be mailed to:

Member Benefits Department
Hermann Sons Life Home Office
P.O. Box 1941
San Antonio, TX 78297-1941

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NOVEMBER

Besides the usual lodge business, please include the following in your November meeting:

- If you would like a representative from the Home Office to attend your lodge's Christmas party, please send an invitation as soon as possible. For more information, click **here**.

- Elect your lodge's 2026 officers. Information on the positions and their responsibilities can be found by clicking **here**. Once the election is held, use the **2026 List of Officers** found in the Forms section or at *hermannsonslife.org/member-benefits/lodges*. The report is due Dec. 14 or as soon as possible after the election.

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ELECTION OF OFFICERS FOR 2026

Local lodges are required to elect officers for the coming year at a meeting during the last quarter of the year. A description of each elected and appointed officer's duties can be found on the next two pages.

A form titled **"2026 List of Officers"** can be found in the Forms section or at *hermannsonslife.org/member-benefits/lodges*. The form is to be used to report the results of the election to the Home Office. This information will be used to update the computer records at the Home Office.

The form should be returned no later than Dec. 14, 2026, or as soon as possible after your election if your election falls after Dec. 14.

As with any form you complete and return to the Home Office, please make a copy for your records.

Email form to:	lodge@hermannsonslife.org
Submit online at:	hermannsonslife.org/local-lodge-activity-report
Or mail to:	Member Benefits Department Hermann Sons Life Home Office P.O. Box 1941 San Antonio, TX 78297-1941

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DECEMBER

Besides the usual lodge business, please include the following in your December meeting:

- Complete the **Report of Meeting Dates for 2026** and submit it to the Home Office before the end of the year. It can be found in the Forms section and at *hermannsonslife.org/member-benefits/lodges/*.

- Remind your lodge's Finance Committee/Financial Trustees that the **Financial Report** for Oct. 1-Dec. 31, 2026, is due January 15. The form is available in the Forms section and at *hermannsonslife.org/member-benefits/lodges/*.

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FINANCIAL REPORT - OCT. 1-DEC. 31, 2026

The **Financial Report** form for the period of Oct. 1, 202, through Dec. 31, 2026, is provided in the Forms section and at *hermannsonslife.org/member-benefits/lodges/*.

It is required that the lodge's Finance Committee or Financial Trustees audit the books and records of your lodge. The form should then be completed and signed by the president and financial secretary.

This form must be returned to the Home Office no later than **Jan. 15, 2026.** As with any form you send to the Home Office, make a copy for your records.

This is done in accordance with the Bylaws of Local Lodges, Section 23, which states, "the Local Lodge Finance Committee shall examine all collections and disbursements by the Lodge . . . and make a written report, upon forms prescribed by the Home Office . . ."

Your prompt attention to this matter is appreciated.

The form should be mailed to:

Member Benefits Department
Hermann Sons Life Home Office
P.O. Box 1941
San Antonio, TX 78297-1941
Attn: Haley Blaylock

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FORMS

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YEARLY PLANNING CALENDAR

DUE FEB. 14

_____ Lodge

PLEASE COMPLETE AND RETURN THIS FORM EVEN IF YOU DO NOT PLAN TO MAIL OR HAND OUT POSTCARDS!

Submitted by _____ **Phone No.** _____ **Email** _____

How will you distribute the cards? ☐ **Mail only** ☐ **Hand out at meeting** ☐ **Both** ☐ **No cards needed**

Month/Day	Time	Lodge Event/Community Service Project	Place	Address

Return this form by FEB. 14 to Hermann Sons Life Home Office, Attn: Member Benefits, P.O. Box 1941, San Antonio, TX 78297-1941.

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DUE FEB. 25

PIN PRESENTATIONS AT LODGE EVENT

The Home Office strives to ensure that all members receive their 60-, 70-, 75- and 80-year pins at an event. Your help in making this happen is most appreciated. When you are setting your calendar for the year, please decide to which meeting/event you would like to invite a Home Office representative to present these pins in
person and then fill out the form below and return it to the Home Office.

NOTE: PINS WILL BE MAILED TO ALL PIN RECIPIENTS. THEY WILL BE ASKED TO BRING THEIR PIN WITH THEM TO THE PIN PRESENTATION SO IT CAN BE FORMALLY PRESENTED TO THEM.
PLEASE RETURN THE FORM NO LATER THAN FEB. 14, 2026. LODGES THAT DO NOT RETURN THE FORM BY THAT DATE CAN NOT BE GUARANTEED A HOME OFFICE REPRESENTATIVE.
THE HOME OFFICE WILL AUTOMATICALLY INVITE YOUR PIN RECIPIENTS ONE MONTH PRIOR TO THE EVENT. THEY WILL BE ASKED TO RSVP TO THE PERSON DESIGNATED ON THE FORM ONE WEEK PRIOR TO THE EVENT.

Lodge Name & Number	
Contact Name **Please circle contact's title**	**President or Secretary**
Contact Phone Number and email if available	
Event Date	
Event Type **(Ex. Picnic, Christmas, Regular Meeting, etc.)**	
Event Time	
Event Place	
Event Physical Address	

☐ **Check this box ONLY if your lodge WILL NOT be doing a pin presentation in 2026.**

50-Year Pins

A list of the members of your lodge who will be receiving their 50-year pins in 2026 also is included. All 50-year pins are mailed directly to members. You are encouraged to invite these members to a meeting where a picture can be taken with your lodge president and included in your report to the *Hermann Sons Life* newspaper.
The form can be completed online at *hermannsonslife.org* or can be mailed to Member Benefits Department, Hermann Sons Life Home Office, P.O. Box 1941, San Antonio, TX 78297-1941 or emailed to *lodge@hermannsonslife.org*.

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LOCAL LODGE ACTIVITY REPORT

Each year the Home Office compiles a report about the activities its local lodges have taken part in during the past year. The information on Community Service will be used when we are defending our tax-exempt status with state and federal lawmakers.

PLEASE COMPLETE THE FORM ON THE NEXT PAGE AND RETURN IT TO THE HOME OFFICE NO LATER THAN FEB. 14.

There is now only one form. It asks for information on your lodge events, community service activities and scholarships/camperships granted. It is available on the next page or at *hermannsonslife.org/member-benefits/lodges/*.

Remember that **LODGE EVENTS** includes all meetings, socials, picnics and Christmas parties. **COMMUNITY SERVICE** includes all lodge-sponsored community service projects. If two or more members are taking part in an event in the name of Hermann Sons Life, it counts as community service. If one member visits a friend in the nursing home, it does not count. To qualify, two or more members must be involved in a lodge-sponsored event. Join Hands Day, Make a Difference Day, Flag Day and Matching Funds projects count as Community Service along with any other donations or money or in-kind donations to community organizations.

When completing the form, have your financial records, minutes and attendance records handy. This information will be a tremendous help in completing the form in a timely manner.

Send the completed form to:

Member Benefits Department
Hermann Sons Life Home Office
P.O. Box 1941
San Antonio, TX 78297-1941

For more information, contact a Member Benefits Representative at 1-800-234-4124, ext. 238, or 210-226-9261, ext. 238.

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DUE FEB. 25

HERMANN SONS LIFE LOCAL LODGE ACTIVITY REPORT
Lodge & Community Service Report for 2026*

Lodge Name _____ **Form Completed By** _____

EXPENDITURES

Total Fraternal Expenditures for 2025 $_____

This includes all expenditures the lodge made MINUS expenditures on community service projects. Donations to Camp, the Retirement Home, the Dance Program and any other Hermann Sons Life entity should be included here.

Total Community Service Expenditures for 2025 $_____

This includes all donations made to outside (not Hermann Sons Life) organizations. If you made in-kind donations (food, meals, clothing, flags, etc.), please estimate the value of these goods and include that number here.

TOTAL EXPENDITURES IN 2025 $_____

LODGE EVENTS

Total Lodge Events for 2025 _____

This includes all meetings, socials, picnics and Christmas parties.

Total number of people who attended these events _____

For example, if you had 20 people at each event and you held 15 events, your total would be 300.

Total number of hours that these events lasted _____

For example, if you held 15 events and each event lasted 2 hours, your total would be 30.

COMMUNITY SERVICE EVENTS

Total Community Service Events for 2025 _____

This includes ALL community service events the lodge conducted in 2021 including but not limited to Join Hands Day, Make a Difference Day and Matching Funds events.

Total number of people who attended these events _____

For example, if you had 20 people at each event and you held 15 events, your total would be 300.

Total number of hours that these events lasted _____

For example, if you held 15 events and each event lasted 2 hours, your total would be 30.

SCHOLARSHIPS/CAMPERSHIPS

Total number of COLLEGE SCHOLARSHIPS the lodge awarded in 2025 _____

Do not include the Retirement Home Scholarship or Hermann Sons Life Camp Scholarship in this total.

Total dollar amount of the COLLEGE SCHOLARSHIPS the lodge awarded in 2025 $_____

Total number of HERMANN SONS LIFE CAMPERSHIPS the lodge awarded in 2025 _____

You may include any cash prizes awarded to campers.

Total dollar amount of the CAMPERSHIPS the lodge awarded in 2025 $_____

You may include any cash prizes awarded to campers.

**** Even if there is nothing to report, please send the report anyway.***

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DUE JUNE 6

2026 JOIN HANDS DAY PROJECT REPORT

Please complete this form and submit it along with pictures to Member Benefits Department, Hermann Sons Life Home Office, P.O. Box 1941, San Antonio, Texas 78297-1941, Attn: Member Benefits or email *lodge@hermannsonslife.org*. You may also complete the form online at *hermannsonslife.org/member-benefits/lodges/*

FORM IS DUE NO LATER THAN JUNE 6.

CONTACT INFORMATION

Lodge name _____

Contact person _____ Office _____

Address _____

City _____ State _____ Zip _____

Phone _____

Email _____

PARTICIPATING ORGANIZATION

Organization with which you joined hands _____

Is it a youth organization? ☐ YES ☐ NO

VOLUNTEERS

How many volunteers took part in the project? _____

PROJECT SCHEDULE AND LOCATION

Date of project _____ Time of project _____

Project location _____

Project location address _____

City _____ State _____ Zip _____

DESCRIBE YOUR PROJECT AND INCLUDE PHOTOS

_____

_____

_____

_____

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DUE MARCH 31

MATCHING FUNDS RESERVATION FORM

Please complete this form and submit it to the Home Office no later than March 31.

The form can be mailed to:	Member Benefits Department Hermann Sons Life Home Office P.O. Box 1941 San Antonio, TX 78297-1941
Or fax the form to:	210-226-3055
Or email the form to:	lodge@hermannsonslife.org
Or complete the online form:	*hermannsonslife.org/member-benefits/lodges*

Name of lodge _____

Projected date of event _____

Type of event/sponsorship _____

Charity to be benefitted/Organization being sponsored _____

Estimated maximum reserve requested (not to exceed $500) _____

Person to be advised of amount reserved:

Name _____

Address _____

City, State and Zip _____

Phone No. _____

Email address _____

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MATCHING FUNDS FINAL REPORT

The Home Office thanks you for sponsoring an event to benefit a 501(c)3 organization in your community.

Please complete the form below and mail it to:

Member Benefits Department
Hermann Sons Life Home Office
P.O. Box 1941
San Antonio, TX 78297-1941

Or email the form to: lodge@hermannsonslife.org

Or complete the form online at: *hermannsonslife.org/member-benefits/lodges*

Include clippings (other than the *Hermann Sons Life* newspaper) or screenshots of social media posts, copies of flyers and tickets and pictures. The social media posts may not be your own or your lodge's. The post must have appeared on a page that is open to the community, e.g., if the chosen charity shares the information on its Facebook page or if there is a community events page in your area, that would qualify. **If all items are not included, the check will be delayed until all items have been received.**

A check will be sent within two weeks of the Home Office's receipt of this form.

Name of lodge _____

Date event completed _____

Name of charity/organization _____

Total amount raised/sponsored _____

Total amount to be donated after expenses (if an event) _____

How was the event advertised _____

_____

_____

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HERMANN SONS LIFE
LODGE FINANCIAL REPORT
JANUARY 1 - MARCH 31

Lodge Name _____ **Year** **2026**

BOOK BALANCE - DECEMBER 31		$
DEPOSITS (RECEIPTS) JAN. 1 - MARCH 31	+	$
TRANSFERS JAN. 1 - MARCH 31	+	$
TOTAL DEPOSITS JAN. 1 - MARCH 31		$

CHECKS (EXPENSES) JAN. 1 - MARCH 31	–	$
TRANSFERS JAN. 1 - MARCH 31	–	$
TOTAL EXPENSES JAN. 1 - MARCH 31		$

BOOK BALANCE - MARCH 31 (Total Deposit Minus Total Expenses)	**	$

BANK RECONCILIATION		
BANK BALANCE - MARCH 31		$
OUTSTANDING CHECKS	–	$
OUTSTANDING DEPOSITS	+	$
TOTAL - SHOULD MATCH BOOK BALANCE ABOVE	**	$

SHOULD MATCH

TOTAL ASSETS OF LODGE		
SAVINGS ACCOUNT BALANCE		$
CD (1)		$
CD (2)		$
OTHER ACCOUNT BALANCES		$
LODGE HALL VALUE		$
OTHER LODGE ASSET VALUE		$
TOTAL ASSETS OF LODGE		$

ACCOUNT INFORMATION

	Name of financial institution, City, State	**Acct#**
BANK ACCT INFORMATION:	_____	Acct# _____
SAVINGS ACCT INFORMATION:	_____	Acct# _____
CD (1) ACCT INFORMATION:	_____	Acct# _____
CD (2) ACCT INFORMATION:	_____	Acct# _____
MORTGAGE LOAN INFO:	_____	Acct# _____

_____ PRESIDENT

_____ FINANCIAL SECRETARY

THE TWO PEOPLE AUTHORIZED TO SIGN MUST NOT BE RELATED BY BIRTH OR MARRIAGE.

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COPIES OF ALL BANK STATEMENTS MUST ACCOMPANY THIS REPORT.

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HERMANN SONS LIFE
LODGE FINANCIAL REPORT
APRIL 1 - JUNE 30

Lodge Name _____ **Year** **2026**

BOOK BALANCE - MARCH 31		$
DEPOSITS (RECEIPTS) APRIL 1 - JUNE 30	+	$
TRANSFERS APRIL 1 - JUNE 30	+	$
TOTAL DEPOSITS APRIL 1 - JUNE 30		$

CHECKS (EXPENSES) APRIL 1 - JUNE 30	–	$
TRANSFERS APRIL 1 - JUNE 30	–	$
TOTAL EXPENSES APRIL 1 - JUNE 30		$

BOOK BALANCE - JUNE 30 (Total Deposit Minus Total Expenses)	**	$

SHOULD MATCH

BANK RECONCILIATION		
BANK BALANCE - JUNE 30		$
OUTSTANDING CHECKS	–	$
OUTSTANDING DEPOSITS	+	$
TOTAL - SHOULD MATCH BOOK BALANCE ABOVE	**	$

TOTAL ASSETS OF LODGE		
SAVINGS ACCOUNT BALANCE		$
CD (1)		$
CD (2)		$
OTHER ACCOUNT BALANCES		$
LODGE HALL VALUE		$
OTHER LODGE ASSET VALUE		$
TOTAL ASSETS OF LODGE		$

ACCOUNT INFORMATION

	Name of financial institution, City, State	**Acct#**
BANK ACCT INFORMATION:	_____	Acct# _____
SAVINGS ACCT INFORMATION:	_____	Acct# _____
CD (1) ACCT INFORMATION:	_____	Acct# _____
CD (2) ACCT INFORMATION:	_____	Acct# _____
MORTGAGE LOAN INFO:	_____	Acct# _____

_____ PRESIDENT

_____ FINANCIAL SECRETARY

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HERMANN SONS LIFE
LODGE FINANCIAL REPORT
JULY 1 - SEPT. 30

Lodge Name _____ **Year** **2026**

BOOK BALANCE - JUNE 30		$
DEPOSITS (RECEIPTS) JULY 1 - SEPT. 30	+	$
TRANSFERS JULY 1 - SEPT. 30	+	$
TOTAL DEPOSITS JULY 1 - SEPT. 30		$

CHECKS (EXPENSES) JULY 1 - SEPT. 30	–	$
TRANSFERS JULY 1 - SEPT. 30	–	$
TOTAL EXPENSES JULY 1 - SEPT. 30		$

BOOK BALANCE - SEPT. 30 (Total Deposit Minus Total Expenses)	**	$

BANK RECONCILIATION		
BANK BALANCE - SEPT. 30		$
OUTSTANDING CHECKS	–	$
OUTSTANDING DEPOSITS	+	$
TOTAL - SHOULD MATCH BOOK BALANCE ABOVE	**	$

SHOULD MATCH

TOTAL ASSETS OF LODGE		
SAVINGS ACCOUNT BALANCE		$
CD (1)		$
CD (2)		$
OTHER ACCOUNT BALANCES		$
LODGE HALL VALUE		$
OTHER LODGE ASSET VALUE		$
TOTAL ASSETS OF LODGE		$

ACCOUNT INFORMATION

	Name of financial institution, City, State	**Acct#**
BANK ACCT INFORMATION:	_____	Acct# _____
SAVINGS ACCT INFORMATION:	_____	Acct# _____
CD (1) ACCT INFORMATION:	_____	Acct# _____
CD (2) ACCT INFORMATION:	_____	Acct# _____
MORTGAGE LOAN INFO:	_____	Acct# _____

_____ PRESIDENT

FINANCIAL SECRETARY

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DUE OCT. 3

2026 Humanitarian of the Year Award

Please complete this form by Oct. 3 and send it to:
Member Benefits Department, Hermann Sons Life Home Office, P.O. Box 1941,
San Antonio, TX 78297-1941, Attn: Member Benefits.
A certificate printed with your honoree's name will be mailed to you by Oct. 11.
The form can be submitted online at *hermannsonslife.org/member-benefits/lodges.*
Please consider submitting a photo of the award presentation and
information on your recipient to your local newspaper.

Date _____ Name of person completing form _____

Lodge Name _____

Name of officer to whom you would like certificate mailed

_____

Address _____ Daytime Phone _____

City _____ State _____ Zip _____

HUMANITARIAN OF THE YEAR INFORMATION

Honoree's Name _____ Member Nonmember
(Please print) *(Circle one)*

Award will be presented at _____ on _____
(Location) *(Date)*

This will be a: Regular meeting Christmas party Other _____
(Circle one)

Describe what he/she has done for the lodge and/or community within the past year that lead your lodge to select this person for this honor. *(Continue on the back if more room is needed.)*

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

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2026 List of Lodge Officers

Lodge Name: _____

President

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Vice President

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Financial Secretary

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Corresponding Secretary *(If combined with Financial Secretary position, leave blank)*

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Financial Trustee 1 (*If elected for a three-year term, what year was the election held?* _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

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Financial Trustee 2 (*If elected for a three-year term, what year was the election held?* _____)

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Financial Trustee 3 (*If elected for a three-year term, what year was the election held?* _____)

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Appointed/Additional Officers *(Optional)*

Position/Title: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Position/Title: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Position/Title: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

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Position/Title: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Position/Title: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Please Select How Often Your Lodge Meets:

☐ Monthly ☐ Bi-Monthly ☐ Quarterly ☐ Other

If Bi-Monthly, Quarterly or Other, please list which months meetings are held:

_____

Meeting Day: _____ *Example: First Monday, Third Thursday, etc.*

Meeting Time: _____

Meeting Location: _____

Meeting Location Address: _____

Form **Must** be Returned to the Member Benefits Department by December 14th at:

Hermann Sons Life
Attn: Member Benefits
PO Box 1941
San Antonio, TX 78297

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DUE DEC. 14

2026 List of Home Association Officers

Home Association Name: _____

President

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Vice President

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Secretary

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Treasurer

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Any Other Elected Home Association Officers *(Attach Additional Pages if Needed)*

Position/Title: _____ Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

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Home Association Board Members *(If Applicable)*

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Back to Table of Contents

Home Association Board Members Continued *(If Applicable)*

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Back to Table of Contents

Home Association Board Members Continued *(If Applicable)*

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Back to Table of Contents

Home Association Board Members Continued *(If Applicable)*

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Name: _____

Cell Phone: _____ Home Phone: _____

E-mail: _____

Address: _____

Please Select How Often Your Home Association Board Meets:

☐ Monthly ☐ Bi-Monthly ☐ Quarterly ☐ Other

If Bi-Monthly, Quarterly or Other, please list which months meetings are held:

_____

Meeting Day: _____ *Example: First Monday, Third Thursday, etc.*

Meeting Time: _____

Meeting Location: _____

Meeting Location Address: _____

Form **Must** be Returned to the Member Benefits Department by December 14th at:

Hermann Sons Life
Attn: Member Benefits
PO Box 1941
San Antonio, TX 78297

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DUE DEC. 15

REPORT OF MEETING DATES FOR 2026

Each lodge is required to report to the Home Office the dates on which it met in 2026.

Complete this form and return it to:

Member Benefits Department
Hermann Sons Life Home Office
P.O. Box 1941
San Antonio, TX 78297-1941

Or complete the form online at: hermannsonslife.org

The deadline to return the form is Dec. 15, 2026. Please make a copy for your records. NOTE: This is one of the forms required in order for your lodge to receive its annual subsidy from the Home Office.

We, the undersigned officers, certify with our own signature that _____

Lodge, located at _____

held its meetings on the following dates during the year **2026**.

MONTH	MEETING DATE
January	_____
February	_____
March	_____
April	_____
May	_____
June	_____
July	_____
August	_____
September	_____
October	_____
November	_____
December	_____

_____ _____

President's Signature Secretary/Treasurer's Signature

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HERMANN SONS LIFE
LODGE FINANCIAL REPORT
OCT. 1 - DEC. 31

Lodge Name _____ **Year** **2026**

BOOK BALANCE - SEPT. 30		$
DEPOSITS (RECEIPTS) OCT. 1 - DEC. 31	+	$
TRANSFERS OCT. 1 - DEC. 31	+	$
TOTAL DEPOSITS OCT. 1 - DEC. 31		$

CHECKS (EXPENSES) OCT. 1 - DEC. 31	–	$
TRANSFERS OCT. 1 - DEC. 31	–	$
TOTAL EXPENSES OCT. 1 - DEC. 31		$

BOOK BALANCE - DEC. 31 (Total Deposit Minus Total Expenses)	**	$

BANK RECONCILIATION		
BANK BALANCE - SEPT. 30		$
OUTSTANDING CHECKS	–	$
OUTSTANDING DEPOSITS	+	$
TOTAL - SHOULD MATCH BOOK BALANCE ABOVE	**	$

SHOULD MATCH

TOTAL ASSETS OF LODGE		
SAVINGS ACCOUNT BALANCE		$
CD (1)		$
CD (2)		$
OTHER ACCOUNT BALANCES		$
LODGE HALL VALUE		$
OTHER LODGE ASSET VALUE		$
TOTAL ASSETS OF LODGE		$

ACCOUNT INFORMATION

	Name of financial institution, City, State	**Acct#**
BANK ACCT INFORMATION:	_____	Acct# _____
SAVINGS ACCT INFORMATION:	_____	Acct# _____
CD (1) ACCT INFORMATION:	_____	Acct# _____
CD (2) ACCT INFORMATION:	_____	Acct# _____
MORTGAGE LOAN INFO:	_____	Acct# _____

_____ PRESIDENT

_____ FINANCIAL SECRETARY

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RITUAL AND BYLAWS

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General Instructions

Regular Meetings.

Each Local Lodge shall arrange for a definite date, time and location for regular meetings to be held at least quarterly (four times per year). Once established, it is the duty of the officers of the Lodge to see that proper meetings are held in accordance with the statutes of the Laws of Hermann Sons Life and the Local Lodge Bylaws.

Meeting Location Layout.

During all regular meetings, the President and Secretaries shall be placed in the most prominent and practical position within the meeting location. All other elected and appointed officers, members and guests may sit wherever is practical for meeting involvement.

Lodge Equipment.

When the Local Lodge is not in session, all Lodge equipment shall be kept in a safe place, accessible to the officers in charge. It is the duty of the elected and appointed officers in charge to see that the meeting location is set up properly. Proper provision should be made to display the United States flag and the flag of the State of Texas.

Important Documents.

Important Lodge documents and supplies such as the Charter, Ritual, Bylaws, minutes, financial statements, regalia, and any other records, when not in use, shall be kept in a place of safekeeping by the respective officers responsible for the same. Current versions of these documents must be readily available during all regular and special Lodge meetings.

Meeting Requirements.

At the opening of each regular meeting, the President shall take his/her station and sound the gavel for order. A complete record of all members in attendance shall be kept. It is the duty of the President to ascertain that a quorum of not less than five (5) members in good standing are present for the purpose of conducting Lodge business and that the Lodge meeting starts promptly as designated by the Lodge.

Honor Our Flag.

Generally, the flags of the United States of America and the State of Texas should be brought into the regular meeting location before the opening of the meeting. However, a Local Lodge may choose to hold a special flag presentation at any regular meeting, special meeting or event they see fit.

MEETING AGENDA

Calling the lodge to order *(President gives one rap of gavel to call members to order.)*

President: Officers and Members, please come to order and be seated.

(President gives two raps of the gavel two times for the membership to rise.)

Pledge of Allegiance to the Flag
President: Face the flag and repeat with me the PLEDGE OF ALLEGIANCE:
"I pledge allegiance to the flag of the United States of America, and to the Republic for which it stands; One Nation under God, indivisible, with Liberty and Justice for all."

OPTIONAL
President: Please join me in the PLEDGE TO THE TEXAS FLAG:
"Honor the Texas flag; I pledge allegiance to thee, Texas, one state under God, one and indivisible."

(The President gives one rap of the gavel for the membership to be seated.)

President: Officers and Members, let us now proceed with the transaction of business, having in mind only the best interest of this Lodge and Hermann Sons Life. I now declare this meeting opened.

Roll call of officers

Introduction of Hermann Sons Life officers and guests

Reading of the previous meeting minutes by the Corresponding Secretary
(Ask for corrections. Ask for motion to accept as read or with corrections. After second is made, call for vote.)

Financial report given by the Financial Secretary
(Ask for corrections. Ask for motion to accept as read or with corrections. After second is made, call for vote.)

Announcement of new members and transfers
President: Are there any new members to be introduced?
(Ask new members to stand as the Lodge Secretary reads their names.)

Report of Agents
(Call on local agent to give report on membership drives, product changes and educational workshops.)

Membership Coordinator Report and Expressions of Condolence
(President gives two raps of the gavel for the membership to rise.)
President: Please rise and observe a moment of silence in honor of our sick and departed members.
(President gives one rap of the gavel for the membership to be seated.)

Committee Reports

Reading of Correspondence

Unfinished Business

New Business

Election of Officers (November or December)

Installation of Officers (First meeting of the year; see Installation of Officers Ceremony)

Birthdays

Anniversaries

Attendance Awards

Adjournment

President: Members, in closing this meeting, may I remind you that we should always be of assistance to members of Hermann Sons Life whereever and whenever possible.
Furthermore, we should always show a spirit of benevolence toward everyone, using as a guide our Motto - FRIENDSHIP, LOVE AND LOYALTY.

I now declare this meeting duly adjourned.

Guidance for Motions

The following information is provided in an effort to assist Local Lodge Presidents. It outlines the proper way to make a motion, discussion the motion and take a vote on the motion.

Note: No discussion can be had without a motion and a second.

Process for Motions during meetings:

1. A member makes a motion "I move that (or to)…"
2. Another member must second that motion before discussion can begin.
3. The President/Chair states the motion: "A motion is on the floor by (member name) to …. And it has been seconded by (member name who seconded)."
4. The President/Chair asks if there is any discussion on the motion
5. Once discussion has been completed the President/Chair calls for the question. If no one objects, the vote is taken.
6. All in favor say Aye, all opposed respond Nay.
7. President/Chair proceeds to announce the result of the vote.
    a. The Ayes have it, the motion carries.
    b. The Nays have it, the motion fails.

To Amend a Motion:

If someone wants to change some of the wording to the motion that is being discussed. (This amendment will need to be seconded in order for discussion to follow.)

1. "I move the motion be amended by adding the following words ___"
2. "I move the motion be amended by striking out the following words ___"
3. "I move that the motion be amended by striking out the following words_____, and adding in their place the following words _____."

You will then vote on the amendment. If approved, you will vote on the motion as amended.

Installation of Officers Ceremony

To be conducted by the President at the first regular meeting of the year.

Will all elected and appointed officers please stand, if you are able.

My Brothers and Sisters, you have been elected and appointed by your Lodge to the office in which you are about to be installed. Do you accept the position to which you have been elected and appointed and are you willing to take the solemn obligation required of you as an officer?

If so, answer "Yes."

Then please place your right hand over your heart and repeat after me the following pledge:

I promise that I will faithfully perform the duties / which the laws of the Order / and the bylaws of my own Lodge demand, / that I will carefully guard and keep / all documents and property entrusted to me, / that I will uphold all the laws / of the Grand Lodge / and the bylaws of my own Lodge, / that are now in force and affect / or that may hereafter be adopted. / For the faithful performance of which, / I herewith give my word of honor.

(One rap - Sit)

Brother and Sister Officers, by virtue of the authority vested in me by the President and CEO of Hermann Sons Life, I now declare you legally installed elective and appointive officers of this Lodge. Your installation has conferred upon you a distinctive honor. I charge you to show your appreciation of this honor by prompt and regular attendance at our Lodge meetings, efficient and dignified performance of your duties, and passing on the history and traditions of Hermann Sons Life to the next generation of leaders.

The officers and directors of Hermann Sons Life have asked me to thank you for accepting a leadership role in your lodge. As ambassadors of our organization it is your voice that keeps Hermann Sons Life vibrant in communities across Texas. We would not be able to serve our members and provide community outreach without you.

Each of you now having been duly installed in office may begin the duties of your office.

May you always be governed and guided by the principles of our Order of FRIENDSHIP, LOVE AND LOYALTY.

HERMANN SONS LIFE

Local Lodge Bylaws

Article I
(Name)

This Lodge is chartered and shall be known as Hermann Sons Life _____ under the jurisdiction of Hermann Sons Life (2022 Laws of HSL, Art. 5.)

ARTICLE II
(Purpose)

Section 1. General Statement

This Lodge is formed for the purpose of operating as a fraternal subordinate lodge of Hermann Sons Life. As a subordinate lodge, it adopts the purpose of the organization to strengthen communities through its member involvement in charitable and community work. If any lodge does not follow these Bylaws or the Laws of Hermann Sons Life, they may be subject to Home Office intervention.

Section 2. Fiscal Obligations

Each Lodge will be expected to meet fiscal obligations set by Hermann Sons Life annually in order to remain an "Active Lodge". This will include the financial reporting required as described in these Bylaws. The Home Office may audit all financials of the Local Lodge at any time.

ARTICLE III
(Meetings)

Section 1. Meetings.

Lodges are required to hold meetings at least once per quarter; however, monthly meetings or events are encouraged.
Of the minimum of four required meetings per year, two must be Regular Membership Meetings held each year. Regular and Special Membership Meetings shall be conducted in accordance with the Order of Business as found in the current Hermann Sons Life Ritual which shall contain complete instructions for operation. Other Lodge meetings may consist of Elected Lodge Officer meetings, social and charitable events, and community service project days.

Section 2. Quorum Requirements.

The quorum requirements for each type of meeting are:

1. Elected Lodge Officer Meetings- A majority of the number of Elected Lodge Officers constitute a quorum.
2. Regular or Special Membership Meetings – Five (5) members in good standing constitute a quorum.
3. Community Service Project Days – No quorum requirements
4. Social or Charitable Events – No quorum requirements

Section 3: Special Membership Meetings.

The Local Lodge President may call a special meeting of the membership when it is deemed in the best interest of Hermann Sons Life or the Local Lodge, provided the purpose for which such special meeting is called is specifically stated.

The Local Lodge President may call in-person, virtual and telephonic special meetings at the location of their choice, or by conference call or video through the vendor of their choice, provided they adhere to the following criteria:

1. Notification of the special meeting date, time, thorough instructions regarding location or join-in method and detailed agenda must be sent to all members at least 10 business days in advance of the meeting. The Lodge's Hermann Sons Life newspaper article, letters and postcards mailed to all members are acceptable examples of special meeting notifications.
2. Special meetings must meet quorum requirements as defined in these Local Lodge Bylaws for any business to be conducted. Attendance must be recorded along with the minutes of the meeting.
3. Special meetings should be conducted in accordance with the procedures outlined in the Hermann Sons Life Ritual.

Upon receipt of written request of seven (7) members in good standing, specifically stating the purpose, the Local Lodge President must call a special meeting of the Local Lodge.

ARTICLE IV
(Officers)

Section 1. Local Lodge Elected Officers.

The elected officers of the Local Lodge are the President, Vice President, Financial Secretary, Corresponding Secretary (which can be combined with the Financial Secretary position if needed) and three (3) Financial Trustees. The Local Lodge may designate and elect additional Local Lodge Officer positions provided that such additional positions are approved by the Local Lodge at a Regular or Special Membership Meeting and by the Bylaws of the Local Lodges Committee.

Section 2. Local Lodge Officer – Qualifications.

Any adult Lodge member whose membership is in good standing is eligible to serve as a Local Lodge Officer. However, Lodges may require background checks on officers as long as they do so with consent and in accordance with all applicable laws. Depending on results or consent refusal, a member may be declined officer eligibility.

No Local Lodge elected officer shall hold more than one elected officer position. A Local Lodge Officer elected or appointed, if possible, should not hold more than one appointed officer position in the Local Lodge at the same time. If a Lodge is unable to fill the majority of the elected Local Lodge Officer positions, the Lodge may be deemed "inactive", and Hermann Sons Life may merge the Lodge with another subordinate lodge.

No Local Lodge elected officer shall hold an elected officer position on a Local Home Association Board to alleviate the potential for a conflict of interest.

Section 3. Local Lodge Past President.

The immediate retiring Local Lodge President may continue to serve as an Elected Lodge Officer in the capacity of Past President for a period of one year following retirement with the approval of the Lodge Officers.

Section 4. Elected Officers – Nomination – Election.

In the month of November or December of each year, each Local Lodge shall nominate and elect all elected officers for the ensuing year.

Section 5. Elected Officers – Terms.
The President, Vice President, and Past President (if elected) shall be elected for a term of one (1) year. The Financial Secretary and Corresponding Secretary may be elected to three (3) year terms or to a one (1) year term.

The Financial Trustees shall consist of three (3) members in good standing to be elected in the same manner and at the same time all other elective Lodge Officers are elected, provided that at the first election in a new Local Lodge such Trustees shall be elected for terms of one (1), two (2) and three (3) years, respectively, and thereafter one Trustee shall be elected each year to serve for a term of three (3) years and until a successor is elected and installed.
Section 6. Local Lodge Elections.
All elections of Local Lodge officers shall be held by written or electronic ballot and conducted in accordance with election procedures established by the Local Lodge, and the Laws and Ritual of Hermann Sons Life.

Section 7. Vacancy in Local Lodge Officer Position.

In the event of a vacancy of a Local Lodge Officer position, the position may be filled by majority vote of the Lodge Officers for the remainder of the term of office.

Section 8. Removal of Lodge Officer.

The Local Lodge Officers may remove an Officer by a majority vote of the Officers, excluding the Officer in question at an Officers Meeting conducted for that purpose, in the event the Officers determine that the Officer is (1) no longer a member of the Local Lodge in good standing (2) has failed to carry out the duties of the office without good cause; (3) is unable to attend to the duties thereof; (4) has breached a duty of the Officer or engaged in conduct unbecoming a Local Lodge Officer.

Section 9. Local Lodge President – Duties.

The Local Lodge President shall preside at all meetings of the Local Lodge; keep order and strictly and impartially conduct all proceedings of the meeting according to parliamentary rules; with the Secretary(ies), sign all minutes, documents, and vouchers drawn from any Local Lodge funds; call special meetings; see that all Laws of Hermann Sons Life the are enforced and that all Lodge Officers perform duties of office; appoint all members of the Local Lodge to serve on committees; request and examine the books and records of the Secretary(ies); and perform other such duties of office that may be required as provided in the Laws of Hermann Sons Life or the Local Lodge Bylaws or the Elected Lodge Officers.

Section 10. Local Lodge Vice President – Duties.

The Vice President shall assist the President when requested; preside at meetings in the absence of the President; and perform such other duties as prescribed by the Elected Lodge Officers.

Section 11. Corresponding Secretary – Duties.

The Corresponding Secretary, shall keep in writing all minutes of the Local Lodge meetings; keep record of the members in attendance; handle all correspondence; give all notices required by the Local Lodge Bylaws and the Local Lodge; present and read to the Local Lodge all official letters and reports from Hermann Sons Life completely; report annually to the appropriate Hermann Sons Life Officer on Local Lodge meetings, upon forms prescribed by Hermann Sons Life; deliver all papers, records and books to the successor in office; and preform other such duties as prescribed by the Local Lodge Bylaws or the Elected Lodge Officers.

Section 12. Financial Secretary – Duties.

The Financial Secretary shall perform such duties that may be assigned by the Lodge; receipt for all money collected and handled by the Lodge and immediately deliver all monies collected to the bank for deposit; report at each regular meeting of the Lodge the financial status of the Lodge and the amount of money on hand; furnish such bond as may be required by the Lodge; report the amount of money collected at each regular meeting before such meeting is closed and deposit the same to the bank; pay bills upon approval of the Lodge; retain bank books, check books and instruments pertaining to deposits and expenditures by the Lodge. Report to the Home Office the finances of the Lodge every quarter. Reports and bank records will be due on the first of January, April, July and October. Deliver all books and records to

the successor in office by January 15, after the election; and perform such other duties as the Lodge Bylaws or the Elected Lodge Officers may prescribe.

Section 13. Financial Trustees – Duties.

The Financial Trustees shall work and operate at all times under the direction of the and advice of the Lodge. Perform such duties as the Local Lodge Bylaws or Elected Lodge Officers may prescribe.

Section 14. Local Lodge Past President – Duties.

The Local Lodge Past President shall perform such duties as may be provided for in these Bylaws, or that may be requested by the President or Elected Lodge Officers.

Section 15. Check Writing Authority.

The Local Lodge Officers shall designate check writing authority and procedures and comply with all requirements of the Local Lodge Hermann Sons Life with regard to the fiscal responsibility and oversight with regard to the funds and property of the Local Lodge. All checks shall be signed by two (2) Elected Lodge Officers, who are not related by birth or marriage.

Section 16. Compensation of Elected Lodge Officers.

Lodge Officers shall serve without compensation but may be reimbursed for reasonable expenses incurred in accordance with the procedures established by the Local Lodge and Hermann Sons Life.

Section 17. Local Lodge Committees.

The Elected Lodge Officers may designate Local Lodge Committees and designate duties and responsibilities of such Committees. Members of the Committees shall be designated by the Lodge President or a majority of the Elected Lodge Officers.

Section 18. Elected Lodge Officers' Meetings.

Elected Local Lodge Officers' meetings may be called by written or electronic notice to the Elected Local Lodge Officers by the President and shall be called by the President upon request of any 3 Elected Local Lodge Officers.

Article V
(Membership and Dues)

Section 1. Membership.

Members of the Local Lodge will be admitted to Local Lodge membership and recognized in accordance with the Hermann Sons Life Ritual and any other procedures established by the

Local Lodge.

Section 2. Local Lodge Membership Dues.

Local Lodge dues will be set by Hermann Sons Life.

Article VI
(Miscellaneous)

Section 1. Additional Laws and Procedures.

These Local Lodge Bylaws may not be amended by the Local Lodge. However, the Local Lodge may establish additional laws and procedures provided that such laws and procedures are approved by the members of the Local Lodge at a Regular or Special Membership Meeting and then by the Bylaws of Local Lodges Committee. In the event of any conflict between such additional Local Lodge Laws and procedures and these Local Lodge Bylaws or the Hermann Sons Life Laws, the Local Lodge Bylaws and the Hermann Sons Life Laws shall control.

Section 2. Lodge Meeting Excused Absences.

Any member and spouse who are unable to attend a meeting of the Local Lodge due to the performance of duties assigned by Hermann Sons Life shall, for the purpose of determining eligibility for election as a Hermann Sons Life delegate, shall not count against them.

Section 3. Local Lodge Complaints or Controversies.

Any complaint, dispute, or controversy between members of the Lodge, or between a Lodge member and the Local Lodge itself, concerning the violation of any of the Laws of Hermann Sons Life or Local Lodge shall be resolved in accordance with the Lodge Dispute Resolution Procedures adopted by Hermann Sons Life. Any Local Lodge complaint or controversy that cannot be resolved by the Local Lodge should be brought to the attention of the Vice President of Member Benefits for further resolution.

Section 4. Dissolution Clause.

No part of the net earnings of the subordinate Lodge shall inure to the benefit of any officer, appointive officer, or member of the Lodge (except reimbursed for reasonable expenses incurred in accordance with the procedures established by the Local Lodge and Hermann Sons Life), and no elected officer, trustee or member shall be entitled to share in the distribution of any of the Lodge assets upon dissolution of the Lodge.
Upon dissolution, the Elected Lodge Officers of the Local Lodge shall distribute any assets remaining, after paying or providing for any legal liabilities of the Lodge, using the following guidelines:

> 10% of the total accumulated monetary assets not to exceed $10,000 may be donated to an entity under our group exemption, to another tax-exempt organization, or as may

be required or permitted, to any exempt organization under Section 501(c)(3) of the Internal Revenue Code, as amended.

90% or the remainder of the total accumulated monetary assets not to exceed $50,000 in the form of a cashier's check, will be surrendered to the Vice President of Member Benefits to be delivered to the subordinate lodge which the Local Lodge will be combined with, at the approval of the Vice President of Member Benefits.

All remaining monetary and physical assets will be surrendered to Hermann Sons Life via the Vice President of Member Benefits for appropriate use within the limits of Federal, State and Local laws.

Article VII
(Home Associations and Other Affiliates)

Section 1. Establishment of Home Associations or other Affiliates.

The Local Lodge may establish one or more Home Associations or other organizations that are affiliated with the Local Lodge ("Affiliates") with the approval of Hermann Sons Life. Affiliates may include but is not limited to 501(c)(2) holding corporations as described under 501(c)(2) of the Internal Revenue Code, and affiliated corporations or other entities that perform functions related to the Local Lodge. The Local Lodge shall ensure that all Affiliates operate in a manner consistent with the mission, purposes, and other requirements of the Local Lodge.

Section 2. Financials.

All Local Lodges must provide the Hermann Sons Life Home Office with quarterly reports on the financial holdings of all Affiliates. Reports must be provided to the Home Office with all financial documentation by the first of January, April, July and October.

The Home Office may audit all financials of the Affiliates at any time.

Section 3. Dissolution Clause.

The Local Lodge shall ensure that all assets of Home Associations and other Affiliates are maintained and used in accordance with the requirements applicable to the Local Lodge. Upon dissolution of the Home Association or other Affiliate, the assets shall be returned to the Local Lodge or otherwise used or disbursed in accordance with the requirements applicable to the Local Lodge. This includes but is not limited to ensuring that no Local Lodge assets inure to the benefit of any individual in violation of the requirements of 501(c)(8) of the Internal Revenue Code.