

# LUSO-AMERICAN FINANCIAL

*A Fraternal Benefit Society*

## Annual Reporting Booklet

For year: \_\_\_\_\_

### 1<sup>st</sup> Quarter

(January, February, March)

Submit 1<sup>st</sup> Quarter Packet by: April 15<sup>th</sup>

Council/Lodge #: \_\_\_\_\_

Council/Lodge City& State: \_\_\_\_\_

**\*\*\*This booklet must be completed by every Council/Lodge to maintain active status\*\*\***



Return Booklet to:

Luso-American Financial

(West Coast Councils) 7080 Donlon Way, Suite 200, Dublin, CA 94568

(East Coast Lodges) 128 Union Street, Suite 203, New Bedford, MA 02746

or fill out forms online at [www.luso-american.org](http://www.luso-american.org)





# LUSO-AMERICAN FINANCIAL

## Quarterly Council/Lodge Report

1. To maintain active status, each council/lodge must complete this form and return it to the Home Office at the end of each quarter, regardless of activity level.

2. Return it by:

|                                 |                                       |
|---------------------------------|---------------------------------------|
| First Quarter (Jan./Feb./Mar.)  | <b>Due by April 15<sup>th</sup></b>   |
| Second Quarter (Apr./May/June)  | <b>Due by July 15<sup>th</sup></b>    |
| Third Quarter (July/Aug./Sept.) | <b>Due by October 15<sup>th</sup></b> |
| Fourth Quarter (Oct./Nov./Dec.) | <b>Due by January 15<sup>th</sup></b> |

3. To qualify for the 5 Star program, completed forms must be received by the applicable deadline.

\*\*\*\*\*

Reporting Period: \_\_\_\_\_ 1<sup>st</sup> Quarter \_\_\_\_\_ 2<sup>nd</sup> Quarter \_\_\_\_\_ 3<sup>rd</sup> Quarter \_\_\_\_\_ 4<sup>th</sup> Quarter

Adult     Youth     20-30's    Council/Lodge No.: \_\_\_\_\_

Council/Lodge City & State: \_\_\_\_\_

Quarterly Report Submitted by: \_\_\_\_\_

Secretary or Youth Directors Name

\*\*\*\*\*

### MEETINGS

Report council/lodge meetings only (time spent addressing council/lodge business; exclude time spent for social activity, etc.) Social time should be included on the following page). Council/Lodge should have at least two meetings per quarter. To include your meeting minutes, please include on a separate sheet of paper and submit with packet. **20 pts. per meeting (max 80 points per quarter)**

| Date of Meeting | Location of Meeting<br>City and State | No. of Attendees | Length of Meeting<br>Time Started & End | Meeting Minutes<br>Included w/ Report                        |
|-----------------|---------------------------------------|------------------|---|--|
|                 |                                       |                  |   | Submit minutes for each meeting on a separate sheet of paper |
|                 |                                       |                  |   | Submit minutes for each meeting on a separate sheet of paper |
|                 |                                       |                  |   | Submit minutes for each meeting on a separate sheet of paper |
|                 |                                       |                  |   | Submit minutes for each meeting on a separate sheet of paper |



# LUSO-AMERICAN FINANCIAL

## Quarterly Council/Lodge Report

### COUNCIL/LODGE ACTIVITIES

Only report events completed by your Council/Lodge (Social, Fundraisers, etc...).

**10 pts. per event (max 30 points per quarter)**

| Date of Event | Total No. of Attendees                       | Type of Event  | Description of Event |
|---------------|--|--|----------------------|
|               | _____ Adults<br>_____ Youth<br>_____ 20-30's | <input type="checkbox"/> Pizza Party <input type="checkbox"/> Dance<br><input type="checkbox"/> Fundraiser <input type="checkbox"/> BBQ/Picnic<br><input type="checkbox"/> Parade <input type="checkbox"/> Camping<br><input type="checkbox"/> Other _____ |                      |
|               | _____ Adults<br>_____ Youth<br>_____ 20-30's | <input type="checkbox"/> Pizza Party <input type="checkbox"/> Dance<br><input type="checkbox"/> Fundraiser <input type="checkbox"/> BBQ/Picnic<br><input type="checkbox"/> Parade <input type="checkbox"/> Camping<br><input type="checkbox"/> Other _____ |                      |
|               | _____ Adults<br>_____ Youth<br>_____ 20-30's | <input type="checkbox"/> Pizza Party <input type="checkbox"/> Dance<br><input type="checkbox"/> Fundraiser <input type="checkbox"/> BBQ/Picnic<br><input type="checkbox"/> Parade <input type="checkbox"/> Camping<br><input type="checkbox"/> Other _____ |                      |
|               | _____ Adults<br>_____ Youth<br>_____ 20-30's | <input type="checkbox"/> Pizza Party <input type="checkbox"/> Dance<br><input type="checkbox"/> Fundraiser <input type="checkbox"/> BBQ/Picnic<br><input type="checkbox"/> Parade <input type="checkbox"/> Camping<br><input type="checkbox"/> Other _____ |                      |



# LUSO-AMERICAN FINANCIAL

## Quarterly Council/Lodge Report

### COUNCIL/LODGE COMMUNITY SERVICE LOG

(Religious, Charitable and Other Organizations)

Only report Community Service completed by your Council/Lodge.

**20 pts. per event (max 60 points per quarter)**

| Date of Event | Total No. of Volunteers                      | Total No. of Volunteer Hours | Description of Event  |
|---------------|--|------------------------------|---|
|               | _____ Adults<br>_____ Youth<br>_____ 20-30's |                              | <input type="checkbox"/> Visit Nursing Home <input type="checkbox"/> Food For the Needy<br><input type="checkbox"/> Meal Delivery <input type="checkbox"/> Helped at Charitable Fundraiser<br><input type="checkbox"/> Worked on Fundraiser for Fraternal Cause<br><input type="checkbox"/> Other _____ |
|               | _____ Adults<br>_____ Youth<br>_____ 20-30's |                              | <input type="checkbox"/> Visit Nursing Home <input type="checkbox"/> Food For the Needy<br><input type="checkbox"/> Meal Delivery <input type="checkbox"/> Helped at Charitable Fundraiser<br><input type="checkbox"/> Worked on Fundraiser for Fraternal Cause<br><input type="checkbox"/> Other _____ |
|               | _____ Adults<br>_____ Youth<br>_____ 20-30's |                              | <input type="checkbox"/> Visit Nursing Home <input type="checkbox"/> Food For the Needy<br><input type="checkbox"/> Meal Delivery <input type="checkbox"/> Helped at Charitable Fundraiser<br><input type="checkbox"/> Worked on Fundraiser for Fraternal Cause<br><input type="checkbox"/> Other _____ |
|               | _____ Adults<br>_____ Youth<br>_____ 20-30's |                              | <input type="checkbox"/> Visit Nursing Home <input type="checkbox"/> Food For the Needy<br><input type="checkbox"/> Meal Delivery <input type="checkbox"/> Helped at Charitable Fundraiser<br><input type="checkbox"/> Worked on Fundraiser for Fraternal Cause<br><input type="checkbox"/> Other _____ |



# LUSO-AMERICAN FINANCIAL

## Quarterly Council/Lodge Report

### DONATION TO OTHERS:

Funds donated to charity, community agencies, religious organizations, youth organizations, scholarships, etc. Include approximate value of food baskets, clothing, supplies, etc. If you wish to do a matching funds donation, please get form located the forms section. The matching funds form must be filled out and submitted to the home office along with copy of check donation.

| Date of Donation | Donation to | Value of Donation | Describe your donation   |
|------------------|-------------|-------------------|--|
|                  |             |                   | <input type="checkbox"/> Monetary <input type="checkbox"/> Food Basket <input type="checkbox"/> Other<br>_____ |
|                  |             |                   | <input type="checkbox"/> Monetary <input type="checkbox"/> Food Basket <input type="checkbox"/> Other<br>_____ |
|                  |             |                   | <input type="checkbox"/> Monetary <input type="checkbox"/> Food Basket <input type="checkbox"/> Other<br>_____ |
|                  |             |                   | <input type="checkbox"/> Monetary <input type="checkbox"/> Food Basket <input type="checkbox"/> Other<br>_____ |

### PRESIDENTS VISIT

*Only fill out if you had your president's visit during this quarter.*

*200 points for a free visit – 100 points for a paid visit*

*400 points if you do a joint president's visit with another Adult council/lodge. A Council/Lodge who doesn't have another council or lodge within 50 miles from them will receive an additional 100 points.*

Date of Visit: \_\_\_\_\_ Location of Visit: \_\_\_\_\_

Mark one with an X: Free Visit: \_\_\_\_\_ Paid Visit: \_\_\_\_\_ Joint Visit w/ other council/lodge: \_\_\_\_\_  
 List council/lodge: \_\_\_\_\_

How many in attendance: \_\_\_\_\_ Adults \_\_\_\_\_ Youth \_\_\_\_\_ 20-30's

Details: \_\_\_\_\_

#### FOR HOME OFFICE USE ONLY

Received by: \_\_\_\_\_ Date: \_\_\_\_\_ Total Points Received for Quarter: \_\_\_\_\_

Meeting Points: \_\_\_\_\_ Activity Points: \_\_\_\_\_ Community Service Points: \_\_\_\_\_