



LUSO-AMERICAN FINANCIAL

Quarterly Council/Lodge Report

Fraternal Planning Worksheet

This form is due by January 31st of each year.

(For the period of January 1st to December 31st of the following year) YEAR: _____

☐ Adult ☐ Youth ☐ 20-30's Council/Lodge No: _____

Council/Lodge City & State: _____

Goals/Objectives for the Year

1. Number of Council/Lodge Meetings per year: _____

Location/Address of Meetings: _____

Day of the Month: _____ Time: _____

2. **Presidents Official Visit:**

Will Visit be free or paid? ☐ FREE ☐ PAID Date of Official Visit: _____

☐ Lunch ☐ Dinner: Time _____

Location: _____

3. **Social Activities Planned for Councils:**

4. How many Social Activities do you plan on having this year: _____

5. **Fraternal/Charitable Activities Planned for Others in the Community:**

How many Fraternal Activities do you plan on having this year: _____

How many Charitable Activities do you plan on assisting this year: _____

6. **Any other Goals or Objectives for the Year:**

Submitted by: _____

Council/Lodge Secretary



LUSO-AMERICAN FINANCIAL

Quarterly Council/Lodge Report

Year End Worksheet

This form is due by January 31st of each year.

(For the period of January 1st to December 31st of the following year) YEAR: _____

☐ Adult ☐ Youth ☐ 20-30's Council/Lodge No: _____

Council/Lodge City & State: _____

1. How many Council/Lodge meetings did you hold this year? _____

2. Did you hold a President visit? _____

If yes, did you do a visit joint with another adult council/lodge? _____

Which adult council/lodge did you have a joint visit with? _____

3. How many social activities did you hold this year? _____

4. How many fraternal activities did you hold this year? _____

5. How many Charitable activities did you assist with this year? _____

If you donated any monetary donations, how much did you donate? _____

What is your council/lodge total number of volunteer hours for the year? _____

6. Did you hold your council/lodge election of officers in the 4th quarter of the year? _____

When did you hold the election of officers? _____

Did you invite your entire membership to the election meeting? _____

Did you submit the new council/lodge roster? _____ If so, when? _____

7. Did you submit Form 990? _____

When did you submit the 990? _____

8. Is your adult council/lodge a supporting council/lodge to a Youth Council? _____

If so, what Youth Council? _____

9. Is your adult council/lodge a supporting council/lodge to a 20-30's Region? _____

If so, what Region? _____

Submitted by: _____

Council/Lodge Secretary



LUSO-AMERICAN FINANCIAL

FORM 990-Supplement

This form is due by January 31st of each year.

Financial Statement for Annual Term Ending December 31, _____

Council/Lodge #: _____

Line No.	GENERAL FUNDS	General Account	Other Account	Grand Total
1.	Balance beginning of term January 1 st	\$	\$	\$
2.	Total Income during this term	\$	\$	\$
3.	Total: (Line 1 plus Line 2)	\$	\$	\$
4.	Total Expenses during this term	\$	\$	\$
5.	Balance end of term December 31 st : (Line 3 minus Line 4)	\$	\$	\$
GRAND TOTAL NET WORTH				\$

Line No.	DETAILS OF INCOME (2)	General Account	Other Account	Total
1.	Interest received during the year	\$	\$	\$
2.	Other _____	\$	\$	\$

DETAILS OF EXPENSE (4)			
Rent	\$	Official Visit Expenses	\$
Supplies/Postage	\$	Council/Lodge Meeting Expenses	\$
Donations	\$	Miscellaneous	\$

Certification of Affidavit

We hereby certify that, to the best of our knowledge, the preceding is an accurate account of the financial condition of this council/lodge and authorize the Luso-American Financial to submit this Financial Report to the Internal Revenue Service.

Signed at _____, _____, on _____
City State Date

Council/Lodge Secretary Signature

Council/Lodge Treasurer Signature

FOR HOME OFFICE USE ONLY

Council/Lodge I.D. No. _____ Received by: _____ Date: _____
Submitted to IRS by: _____ Date: _____