



A Non-Profit Public Benefit Corporation for Retired Men
Devoted to the Promotion of Independence and Dignity of Retirement

THE SIR MANUAL

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INSTRUCTIONS

THE SIR MANUAL is the property of Sons In Retirement, Incorporated. It is available on the SIR Website to all members of the SIR organization as the official copy. A hard copy or electronic issue is in the possession of and maintained by each Branch Secretary. All other copies at all levels of the SIR organization are considered personal copies and are maintained by the individual holders. The standards, content and procedures covering maintenance of this Manual and copies thereof are explained in the Standing Rules 1-5 and 11-11.3.

Pages in this Manual that were revised since Edition 8/6/12 are dated 11/13/12.

**Checklist for this Edition is on the SIR Website wherein changed pages are highlighted.
Revised Pages Only for this Edition are for easy printing and is on the SIR website.**

UPDATE:

**Replace the Cover Page & Pages
a, c, 7, 53 and new 53.1**

~ EDITION 11/13/2012 ~

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Article 4 - Maximum Membership

RULE 74. Any restriction in the size of a Branch is against the principles and intent of Sons In Retirement and is therefore prohibited. Branches shall not establish maximum memberships nor inhibit recruitment and induction of new members by any means, including through waiting lists and moratoriums on application submittals. Any exception to this rule proposed by a Branch Executive Committee shall be submitted through its Area Governor and Regional Director to the President for consideration. The exception must be approved by the State Board. (New 11/11/08)

RULE 75. (Deleted 6/10/08)

RULE 76. (Deleted 6/10/08)

RULE 77. (Deleted 6/10/08)

Article 5 - Dual Membership

RULE 80. Membership in more than one Branch at the same time is not permissible.

Article 6 - Transfer of Membership

RULE 85. An active member may transfer his membership to a Provisional Branch or to another Chartered Branch by submitting a Membership Application to the Membership Chairman of the Branch to which he desires to affiliate. (Revised 6/3/03)

RULE 86. An active member who transfers to an active or Provisional Branch shall retain his active status and is not required to attend a branch meeting before being accepted for membership in the branch. (Revised 6/3/03) (11/13/12)

RULE 87. Sponsorship by a member of the Branch to which a member is transferring is not required. (Revised 6/10/08)

RULE 88. Upon his acceptance by the Branch Executive Committee, the Secretary of the Branch to which the member is transferring shall so notify the Secretary of the Branch from which he is transferring and request his membership record. (Revised 9/13/05)

Article 6 - State Treasurer

RULE 865. The State Treasurer shall keep and maintain, or cause to be kept and maintained, adequate accounts of the properties and financial transactions of the Corporation, including accounts of its assets, liabilities, receipts, disbursements and insurance matters.

RULE 866. State Treasurer submittals.

- a. **On or before December 15th the Treasurer Elect shall submit to the President elect for his consideration a draft annual budget based upon prior years' records and input from incoming Office Holders and Committee Chairmen, and the proposed amount of the annual branch assessment for the ensuing year. The President shall submit an annual budget and the amount of the proposed annual branch assessment to the Board of Directors for approval at the January meeting. The Board of Directors may revise the annual budget and the amount of the branch assessment as needed throughout the year. The current approved budget shall be posted on the sirinc.org web site in the "State Treasurer Reports" section. (Revised 4/16/01) (Revised 6/3/03) (Revised 11/13/12)**
- b. **December 31, March 31, June 30 and September 30 of each year the Treasurer shall invoice Chartered and Provisional Branches one quarter of the approved annual branch assessment in effect for that quarter. The amount to be invoiced for each SIR Member shall be determined by dividing the quarterly assessment by the total number of active SIR members, excluding Honorary Life Members, reported on Form 28 for the second month of the quarter preceding the invoice date. The amount to be invoiced each branch is determined by multiplying the amount per active member times the number of branch members reported on Form 28, excluding Honorary Life Members. Payment by each branch is due upon receipt of the invoice. (New 11/13/2012)**

RULE 867. The Treasurer shall deposit all funds and other valuables in the name of, and credit to, the Corporation with such depositories as may be designated by the State Board.

RULE 868. The Treasurer shall disburse funds as specified below:

- a. Payment of Expense Claim Vouchers as specified in Rule 38.
- b. Payment of SIR products, services or activities that are supported by receipts and the cost of which does not exceed \$1,500.00.
- c. **Payment of SIR products, services or activities in excess of \$1,500.00 that have received prior authorization in writing from the State Board, or in the case of an urgent situation in writing from the State Executive Committee.**
(Revised 11/13/12)
- d. Regardless of the above, the State Treasurer has the authority to pay, upon presentation of invoices, insurance premiums in the amount annually negotiated by the SIR State Insurance Chairman even though it may exceed \$1,500.00.
(Revised 11/13/07)

Revised (11/13/07), Revised and repaginated(11/13/12)

Article 6 - State Treasurer (Continued)

RULE 869. The Treasurer shall file Income Tax Returns and any other forms required by Federal and California Taxing Authorities. He shall require and retain, for all tax documents, proof of delivery signed by representatives of the appropriate taxing authorities. Copies of the emails enclosing forms filed online shall be retained. Both forms of proof of delivery shall be retained as long as required by the taxing authorities. Filing instructions for specific documents are shown below:

- a. Form 199. The "California Exempt Organization Information Return", together with the appropriate filing fee shall be filed on or before May 15th. This "Group Return", includes information for all Chartered Branches regardless of annual Branch gross receipts.
- b. Form 990. The "Federal Return of the Organization Exempt from Income Tax" shall be filed annually by May 15th for the State Corporation only.
- c. Form RRF-1 shall be filed annually by April 15th with the California Attorney General.
- d. The Subordinate Corporation listing shall be filed annually by August 31st with the IRS.
- e. Form 990N shall be filed annually by May 15th in electronic format for every Subordinate SIR corporation (branch).

(Revised 11/13/12)

RULE 870 On or before the 10th of each month the Treasurer shall deliver Profit and Loss and Balance Sheet reports for the current month and year to date to each State Board Member, and post these reports on the sirinc.org web site in the "State Treasurer Reports" Section. These reports shall show comparisons to the approved annual budget.

(Revised 11/13/07) (11/13/12)

RULE 871. The Treasurer shall have such other powers and perform such other duties as may be authorized by the President or the State Board.