

US JCI SENATE



2017 - 18

STATE TREASURER'S MANUAL

US JCI SENATE STATE TREASURER'S MANUAL

Congratulations on your election as Treasurer! Hopefully the following information will assist you throughout the year as you perform your duties.

If you have questions as you review this information, please contact the US JCI Senate Treasurer or Membership Information Services Program Manager. They are resources for anything treasury related that might come up this year.

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TABLE OF CONTENT

DIFFERENCE BETWEEN A 501C3 & 501C4	3
WHAT IS THE IRS FORM 990?	4
E-FILE FOR CHARITIES AND NON-PROFITS	5
EMPLOYER ID NUMBERS	7
ANNUAL DUES	8
MENTORS	14
HELPFUL HINTS	15

FORMS

DUES PAYMENT REMITTANCE FORM	12
MENTOR'S SPONSOR SHEET	15
CHECK REQUEST FORM	16

EXAMPLES

A: DUES BILLING ROSTER	10
B: ADD – DROP - CHANGE FORM	11
C: POST CARD MENTORS NOTIFICATION	14
D: PRESIDENT'S MEMBER DUES LETTER	17
E: PRESIDENT'S MEMBER DUES FOLLOW-UP LETTER	18

What is the Difference Between a 501C3 & 501C4?

The difference between 501(c)(3) and 501(c)(4) organizations

Many people often wonder what the difference is between a 501(c)(3) and a 501(c)(4) organization. It is easy to confuse the two classifications as both are considered nonprofits and there are many similar characteristics. However, there are crucial differences between these two types of nonprofit organizations and it is important to understand the distinction.

According to the Internal Revenue Service Code, 501(c)(3) and 501(c)(4) organizations are nonprofit organizations that are exempt from paying federal income tax. 501(c)(3) organizations are either a public charity, private foundation or private operating foundation with open membership whereas 501(c)(4) organizations are civic leagues or associations operated exclusively for the promotion of social welfare or local associations of employees with limited membership.

Which should you choose, a 501(c)(3) or a 501(c)(4)?

If you want the best of both worlds, you can have two separate but affiliated organizations - one a charitable 501(c)(3) and the other a 501(c)(4) lobbying arm. Many trade organizations lobby extensively on behalf of their members, but have an affiliated 501(c)(3) foundation for charitable giving and educational purposes.

Overview of Exempt Nonprofits

Nonprofits are business that are created for a purpose other than generating profit. An organization is not precluded from raising revenue, but the funds must be used to support the purpose of the nonprofit and not paid out to directors, members, or staff beyond reasonable compensation. Although this definition is expansive, many nonprofits choose to be subject to more limited rules created by the Internal Revenue Service. Adherence these guidelines can make the nonprofit eligible for a federal tax exemption, meaning that it does not need to pay income taxes. Further, depending on the laws of the state in which it is formed, certain sales, property, and state income tax exemptions may be pursued once the federal exemption is obtained.

Types of Organizations

According to IRS rules, public charities, private foundations and organizations that promote a religious, scientific, charitable, or literary purpose may pursue a tax-exempt classification known as 501(c)(3) status. Examples of these organizations include churches, youth summer camps, and museums. By contrast, civil leagues and local associations that further a social welfare objective but do not quite rise to the level of a charitable organization may pursue 501(c)(4) status. Examples of these organizations are the Lions Club and homeowners' associations.

Lobbying

One fundamental difference between 501(c)(3) and 501(c)(4) organizations, is in their ability to freely conduct political or lobbying efforts. These activities include attempts to help pass or repeal legislation, as well as outreach to gain public support or opposition to legislation. 501(c)(3) nonprofits are limited to conducting only "insubstantial" lobbying efforts, determined by the size of the organization. Typically, insubstantial means that you would allocate less than 10 percent of the nonprofits total operating budget. If the nonprofit is found to have engaged in substantial lobbying efforts, it will lose its exempt status. Further, these organizations are prohibited from supporting or endorsing any candidate for public office. By contrast, 501(c)(4) organizations may engage in unlimited lobbying and promotion of candidates, provided that these efforts dovetail with the purpose of the organization.

Deductions

501(c)(3) and 501(c)(4) nonprofits also differ when it comes to deductions available to individuals and businesses that donate to the organization. Donations to a 501(c)(3) are entirely deductible as a charitable contribution on the donor's tax return. In contrast, donations made to a 501(c)(4) are generally not deductible. This benefit to 501(c)(3) nonprofits can provide a greater incentive to donors, who otherwise might not contribute. However, depending on the nature of the donor's business, certain contributions to a

501(c)(4) may be considered deductible as business expense. Determining when this deduction applies can be complicated, and donors should be advised to contact an accountant before taking the deduction.

What Is the IRS Form 990?

Updated for Tax Year 2016

OVERVIEW

Most tax-exempt organizations must annually file IRS Form 990, an informational tax form.

IRS Form 990 is an informational tax form that most tax-exempt organizations must file annually. In a nutshell, the form gives the IRS an overview of the organization's activities, governance and detailed financial information. Form 990 also includes a section for the organization to outline its accomplishments in the previous year to justify maintaining its tax-exempt status. In collecting this information, the IRS wants to ensure that organizations continue to qualify for tax exemption after the status is granted.

Organizations that must file Form 990

Most tax-exempt organizations that have gross receipts of at least \$200,000 or assets worth at least \$500,000 must file Form 990 on an annual basis. Some organizations, such as political organizations, churches and other religious organizations, are exempt from filing an annual Form 990.

Information reported on Form 990

Form 990 initially requires the organization to describe its mission or other significant activities. The organization must then disclose financial details on its revenues, expenses, assets and liabilities. The IRS also wants to ensure that the organization is worthy of maintaining its tax-exempt status and requires more details on the types of activities it engages in during the year. A significant portion of the form requires information on how the organization is governed, and specifically requests the names of its officers, directors, highly compensated employees and other employees who are involved with managing the organization. An organization that over-compensates its management may jeopardize its tax-exempt status with the IRS.

Attachments to Form 990

Part IV of Form 990 provides a detailed checklist of supporting documents that may be required depending on the answers given to a list of questions. For example, many tax-exempt organizations must file a Schedule B, Schedule of Contributors, listing all contributions it receives during the year.

A Schedule C may also be necessary to report the political activities of a tax-exempt organization. Other documents include a Schedule D to provide more detailed financial statements, a Schedule F to report the organization's level of activity outside the United States and a Schedule G to describe the organization's fundraising activities.

Alternatives to Form 990

Tax-exempt organizations with less than \$200,000 of gross receipts and less than \$500,000 in assets can file Form 990-EZ, which is the "short form" version of Form 990. However, private foundations must file Form 990-PF and black lung benefit trusts must file Form 990-BL.

The shortest version of Form 990, the Form 990-N, can only be filed by organizations with gross receipts of \$50,000 or less. Form 990-N is referred to as an "e-postcard" since it can only be filed online and requires minimal information. Any organization that fails to file the appropriate Form 990 for three consecutive years risks having its tax-exempt status revoked by the IRS.

e-file for Charities and Non-Profits

Electronic filing provides fast acknowledgement that the IRS has received the return and reduces normal processing time, making compliance with reporting and disclosure requirements easier. Charities and non-profits can file the following forms electronically through an IRS Authorized e-File Provider.

- Form 990, Return of Organization Exempt from Income Tax
- Form 990-EZ, Short Return of Organization Exempt from Income Tax
- Form 990-PF, Return of Private Foundation
- Form 990-N (e-Postcard)
- Form 8868, Application for Extension of Time to File an Exempt Organization Return
- Form 1120-POL, U.S. Income Tax Return of Political Organizations
- Form 7004, Application for Automatic Extension of Time to File Certain Business Income Tax, Information, and Other Returns (extension form for Form 1120-POL)

Form 990-N (e-Postcard) - Annual electronic filing requirement for small tax-exempt organizations

Small tax-exempt organizations (those normally with annual gross receipts up to \$50,000 may be required to file an annual electronic notice, Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or 990-EZ. This filing requirement applies to tax periods beginning after December 31, 2006, and may apply to organizations that previously were not required to file returns.

Requesting a waiver from required e-filing

Notice 2010-13 establishes criteria under which tax-exempt organizations can request waivers from the electronic filing requirement:

- Where the exempt-organization cannot meet electronic filing requirements due to technology constraints; **or**
- Where compliance with the requirements would result in undue financial burden on the filer.

Contacting IRS

The following toll-free numbers are provided for Charities and Non-Profits having account, tax law, or technical questions.

- Have tax law questions or need help completing Forms 990/990-EZ? Call 1-877-829-5500.
- Have e-file technical questions? Call the IRS e-Help Desk at 1-866-255-0654.

Annual Electronic Notice (Form 990-N) for Small Organizations FAQs: How to File How do I file Form 990-N, the e-Postcard?

Use the Form 990-N Electronic Filing system (e-Postcard) to electronically submit Form 990-N, *Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ*.

- The Form 990-N electronic-filing system was moved from Urban Institute's website to IRS.gov on Feb. 29, 2016. ALL ORGANIZATIONS must register at IRS.gov prior to filing their next Form 990-N. This is a one-time registration; you won't be asked to register again when you file next year.
- Form 990-N must be completed and filed electronically. There is no paper form.
- Use the Form 990-N Electronic Filing System (e-Postcard) [User Guide](#) while registering and filing.

See [Annual Electronic Filing Requirement for Small Exempt Organizations](#) for more information on Form 990-N.

What should I do if I'm having trouble with the Form 990-N electronic filing website?

If technical issues prevent you from registering or filing with the Form 990-N electronic filing system, try the suggestions below. If the problem still exists after trying all of the suggestions below, contact IRS Customer Account Services at 877-829-5500 (a toll-free number).

Take the following steps to prevent problems during the registration and filing processes:

- **Refer to the Form 990-N Electronic Filing System (e-Postcard) [User Guide](#) for instructions.**
- **Close multiple browsers when registering.**

Errors may occur if you have additional Internet browsers open during the registration process. Please close other Internet browser windows.

- **Do not use a smart phone to register or file your Form 990-N.**
- **Use correct text characters when registering and filing.**

Ensure that you use only letters, numbers or a hyphen when entering text fields. This character limit does not apply to password fields. When choosing a password on the Security Profile page, ensure you only use only letters, numbers, !, or #. Also, you may use spaces when choosing a site phrase.

- **Check your spam/junk email folders.**
When registering or requesting a user-identification reminder, check your junk/spam email folders for a response. The email may have been filtered out by your email program.
- **If you receive a “Registration Error, Unauthorized Access” warning** when you hit the SEND button while registering, ensure that you are not using a computer on a shared network. Please try to register on a non-networked computer.
- **If the suggestions above don’t resolve the issue, sign out of the filing system (if logged in), close all programs and shut down your computer.**
Wait a minute, restart your computer and try again. This step is required before calling the Customer Account Services line (877-829-5500) for technical help.

How much does it cost to file Form 990-N?

Form 990-N can be filed for free at IRS.gov. There is no paper form.

Do I need special software to file Form 990-N?

No, the IRS has created a simple Internet-based process for filing Form 990-N, so organizations do not need to purchase software to file. Organizations that do not have access to a computer can go to places that provide Internet access to the public, such as their local library, to file the Form 990-N, the *e-Postcard*.

Do I need an e-mail address to file Form 990-N?

Yes, you will need an e-mail address. The system uses the e-mail address to activate your login ID and password.

You will not receive notification by email that your form was rejected or accepted. You must return to the Form 990-N electronic Filing system (e-Postcard) to determine the status of your organization’s Form 990-N.

When my organization attempted to file Form 990-N, we received an error message indicating that the EIN was incorrect. What should we do?

If you are certain that your EIN was entered correctly, the IRS may not have your organization listed as a tax-exempt organization. This may be because your application for tax exemption is pending or you did not apply for tax exemption. If this is the case, an officer of the organization should contact Customer Account Services at 1-877-829-5500 (a toll-free number) and ask that the organization be set up to allow filing of Form 990-N, the *e-Postcard*.

Your organization will need to allow six weeks for the IRS to update its records before you can file your Form 990-N. Your organization should not be concerned if this delay causes your filing to occur after your Form 990-N is due because there are no late filing or delinquency penalties associated with Form 990-N. Note, however that an organization's tax-exempt status is automatically revoked if it does not satisfy its annual filing requirement for three consecutive years.

Employer ID Numbers

An Employer Identification Number (EIN) is also known as a Federal Tax Identification Number, and is used to identify a business entity. Generally, businesses need an EIN. You may apply for an EIN in various ways, and now you may apply online. ***This is a free service offered by the Internal Revenue Service and you can get your EIN immediately.*** You must check with your state to make sure you need a state number or charter.

Apply for an EIN Online

Check out IRS Interview-style online EIN application. No need to file a Form SS-4! They ask you the questions and you give them the answers. The application includes embedded help topics and hyperlinked keywords and definitions so separate instructions aren’t needed. After all validations are done you will get your EIN immediately upon completion. You can then download, save, and print your confirmation notice. It’s fast, free, and user-friendly!

Filing for Tax Exempt Status?

It's best to be sure your organization is formed legally before you apply for an EIN. Nearly all organizations are subject to automatic revocation of their tax-exempt status if they fail to file a required return or notice for three consecutive years. When you apply for an EIN, we presume you're legally formed and the clock starts running on this three-year period.

Verify Your EIN

If you want to verify your EIN, see the [Lost or Misplaced Your EIN](#) page on the IRS website for instructions.

ANNUAL DUES

Annual dues to be a member of the US JCI Senate are five dollars (\$5).

- The membership year is July 1st to June 30th.
- Dues are collected on a quarterly basis; to be received on or before:
 - September 1st
 - December 1st
 - March 1st
 - June 1st

ROSTER

- Obtain your current State roster from the US JCI Senate Membership Information Services Program Manager (**See Example A**)
- The roster will reflect all dues paid Senators submitted by your State.
- The roster will contain the following information:
 - Senator's Name
 - Senate Number
 - Address
 - Due Date
 - Life Member Status

QUARTERLY DUES KITS

- Kits will be sent electronically approximately 6-8 weeks prior to the due date for the quarter.
- Each kit will contain the following;
 - **Cover Sheet**
This should be completed and mailed along with a check for the amount of dues owed, to the US JCI Senate Treasurer. It must be received no later than the 5th of the month for the appropriate dues quarter.
 - **State Roster**
This serves as your quarterly update of your current membership. Review this very carefully to ensure that the information you submitted the previous quarter is correct. If any information is highlighted in yellow, it is making you aware of a change from the Membership Information Services Manager. Most of these changes are most likely address changes. It is important that you update your records with this information.
 - **Dues Billing Form**
This will reflect your entire roster with the current quarter marked in red. You will want to include any listed Senators to be dropped on the Add / Drop / Change Form. If a member is not listed to be dropped on that form it will be presumed that they are to be renewed. When you have completed your dues billing you need to electronically send it back to the Membership Information Services Program Manager no later than the date it is due. **Do not make changes on the dues billing form.** Use the Add / Drop / Change form for all changes of names, addresses, senate numbers, life membership number, etc.
 - **Add / Drop / Change Form (See Example B)**
Only use this form to make changes, drop a current member or add new members. **Do not try to renew members on this form.** When adding new members there is a column indicating whether this member is already a member of another state, please mark this

column with an X if appropriate. Highlight the changes you are making. This makes it easier for data input. Once you have completed your Add / Drop / Change form you will need to electronically send it back to the Membership Information Services Program Manager no later than the date it is due. You may submit address changes using the Add / Drop / Change form at any time throughout the year. Members can only be dropped during the quarter they are due...this includes deceased members.

WHEN COMPLETING THIS FORM, USE ALL CAPITAL LETTERS.

If the US JCI Senate Treasurer does not receive your cover sheet and check by the 5th of the month due, he/she will electronically notify you. This notification will be copied to the Membership Information Services Program Manager and your National Vice-President.

IN SUMMARY;

After completing your dues kit you will:

1. Electronically send the entire kit back to the Membership Information Services Program Manager. This will include:
 - the completed cover letter,
 - the Add/Drop/Change form with:
 - All new member information listed
 - All members to be dropped listed
 - Any address changes listed.
 - Any new life time membership numbers listed (only include life members of the US JCI Senate)
2. Send only the completed cover letter and check to the US JCI Senate Treasurer.

GENERAL INFORMATION

The accepted form of payment for dues is a check or money order payable to the US JCI Senate. This is the same for any checks sent in for Mentors or the presidential raffle.

EXAMPLE A: DUES BILLING ROSTER

ST	REG	DUE	FIRSTNAME	LASTNAME	SENATE	LIFE	ADDRESS	CITY	STATE	ZIP
WA	9	DEC	CAROLYN	AHLGREN	72599		1545 S CHELAN	WENATCHEE	WA	98801
WA	9	DEC	JUDY	BROWN	71539		24019 10TH PL W	BOTHELL	WA	98021
WA	9	DEC	DARRELL W	DAVIS	33062		PO BOX 21511	EUGENE	OR	97402
WA	9	DEC	SUE	DONOHUE-SMITH	58313		302 RIFE DR	ROGERS	AR	72758
WA	9	DEC	DALE	GEHRKE <i>deceased</i>	39835	*	25 BOYER DR	WALLA WALLA	WA	99362
WA	9	DEC	GEORGE	KIVETT	49215	*	PO BOX1233	STANWOOD	WA	98292
WA	9	DEC	LISA	LOUTZENHISER	66604		6339 34 AVE SW #413	SEATTLE	WA	98126
WA	9	DEC	THOMAS	MCMAHAN	31032	*	502 STATE STREET	SUMNER	WA	98390
WA	9	DEC	LARRY	OLSON	65767	*	4305 32 AVE W	SEATTLE	WA	98199
WA	9	DEC	DL BUD	SCHIFFLER	9575	*	858 AUTUMN LN	BELLINGHAM	WA	98229
WA	9	DEC	LINDA	SMITH	57328	*	22017 100TH CT S E	KENT	WA	98031
WA	9	DEC	RANDALL	STANDISH	61453	*	1120 15TH AVE #6	SEATTLE	WA	98122
WA	9	JUN	DAVE	AMLIN	34152	*	5609 176 ST SW	LYNNWOOD	WA	98037
WA	9	JUN	EMERSON	BISHOP	7021	*	25605 SE 392	ENUMCLAW	WA	98022
WA	9	JUN	BEV	BRISKEY	58992	*	958 JOHNS RD E	TACOMA	WA	98445
WA	9	JUN	WM MIKE	BROWN	26852		24019 10TH PL W	BOTHELL	WA	98021-8585
WA	9	JUN	AL	BURRAGE	28777	*	2215 46TH AVE SW	SEATTLE	WA	98116
WA	9	JUN	GREGORY	HAMMIRICH	52568	*	PO BOX 33328	SEATTLE	WA	98133-0328
WA	9	JUN	RICK	HATLEY	41078	*	1004 4TH ST NE	AUBURN	WA	98002
WA	9	JUN	PAM	JAHNKE	60763		912 N 15TH	PASCO	WA	99301
WA	9	JUN	DUNCAN	KIRK	57177	*	15 164TH ST SW #F-1	BOTHELL	WA	98012
WA	9	JUN	LINDA	KURUJ	60915	*	7514 39TH NE	SEATTLE	WA	98115
WA	9	JUN	BOB	MAIZELS	17670	*	10842 NE 12TH PL	BELLEVUE	WA	98004
WA	9	JUN	MIKE	MCDERMOTT SR	32880	*	PO BOX 727	AUBURN	WA	98002
WA	9	JUN	GARY	OLDFATHER	27958		17693 ROAD 5 NW APT 49	QUINCY	WA	98848-8879
WA	9	JUN	LEISA	POND	65434		16777 SHOLIC ST	VICTORVILLE	CA	92395-9187
WA	9	JUN	WAYNE	SEVERSON	56147		3434 S 144 ST	TUKWILA	WA	98168
WA	9	JUN	ANGIE	STRUTTMANN	64531	*	4810 S M STREET	TACOMA	WA	98408
WA	9	MAR	LANCE	AHLGREN	68705		1545 S CHELAN	WENATCHEE	WA	98801
WA	9	MAR	ED	BARNES	23339		2227 S 284TH PLACE	FEDERAL WAY	WA	98003
WA	9	MAR	STEVE	BOVE	67119		6604 PHILMARK LN	ABERDEEN	WA	98520-7928
WA	9	MAR	DANNY	CLYDE	72954		20106 119TH STREET EAST	BONNEY LAKE	WA	96391
WA	9	MAR	ROBERT	FARMER	72984		2007 QUEEN AVENUE NE	RENTON	WA	98056
WA	9	MAR	KEITH	GAMBLE	39900	*	2728 202ND AVE CT E	SUMNER	WA	98390
WA	9	MAR	JILL	GRIFFIN	67005	*	11319 8TH AVE NE APT 201	SEATTLE	WA	98125-6123
WA	9	MAR	JOE	HESKETH	7707	*	2503 158TH AVE SE	BELLEVUE	WA	98008-5417
WA	9	MAR	DAVID	KONEN	54296	*	PO BOX 657	KENT	WA	98035
WA	9	MAR	MIKE	MCCARTY	71440	*	12520 ROOSEVELT WAY NE # 404	SEATTLE	WA	98125
WA	9	MAR	DON	RODMAN	29738	*	E 4321 GLENNAR DR	SPOKANE	WA	99223
WA	9	MAR	JAMES	SAKAMOTO	60275	*	420 BELLEVUE WAY SE #201	BELLEVUE	WA	98004
WA	9	MAR	JAY	STUMPF	65785		4020 IVY ROAD	PASCO	WA	99301
WA	9	MAR	KETRA	STUMPF	65345		4020 IVY ROAD	PASCO	WA	99301
WA	9	MAR	LLOYD	TREFRY	12545	*	225 19TH ST NE #28	EAST WENATCHEE	WA	98802
WA	9	MAR	KARYN	TUYRA-VANDECAR	61721	*	1707 W 25TH PL	KENNEWICK	WA	99337
WA	9	MAR	TARA	WINKLER	72174	*	17405 120TH LN SE APT 1202	RENTON	WA	98058
WA	9	SEP	JOHN	BURRAGE	36702	*	905 S 209TH ST	DES MOINES	WA	98198
WA	9	SEP	HAL	DIMOND	11149		4320 S 41ST ST APT 13	TACOMA	WA	98409
WA	9	SEP	DAN	HARRIES	46204		902 9TH STREET	CLARKSTON	WA	99403
WA	9	SEP	BOB	HAVENS	63621	*	19658 NE 179TH ST	WOODINVILLE	WA	98077
WA	9	SEP	BARRY	JENKINS	55358	*	1261 BOYER AVE	WALLA WALLA	WA	99362-2501
WA	9	SEP	JIM	MCDONALD	16113	*	13246 SE 336TH PL	AUBURN	WA	98092
WA	9	SEP	BOB	MCLEAN	46170	*	1217 119 ST S	TACOMA	WA	98444
WA	9	SEP	LES	MILLER <i>deceased</i>	45157	96	5704 TIMBERLINE DR	WEST RICHLAND	WA	99353-8777
WA	9	SEP	JILL	MURRAY	65768	*	7503 210TH ST SW UNIT 13	EDMONDS	WA	98026
WA	9	SEP	ANN-MARIE	SPEIRS	61445	*	11815 NE 68TH PL	KIRKLAND	WA	98033-8428
WA	9	SEP	CANDY	STAROWSKI	47959	*	8531 S 124TH ST	SEATTLE	WA	98178
WA	9	SEP	ROBERT	STAROWSKI	41472	*	8531 S 124TH ST	SEATTLE	WA	98178
WA	9	SEP	LOUISE	ZEILE	60916	*	PO BOX 15620	SEATTLE	WA	98115-0620

EXAMPLE B: ADD – DROP - CHANGE FORM

State: OHIO

Date: 27-May-14

Person Submitting: VICKY DEMPSEY

Page: 1

Phone: Home 937-252-2800 Cell 937-307-0072

Email: Demps58206@aol.com

MEMBER OF ANOTHER STATE	A/D/C	FIRST NAME	LAST NAME	SENATE #	LIFE #	ADDRESS	CITY	STATE	ZIP CODE
	A	Nancy	Beach	51451		401 W Shoreline Drive	Sandusky	OH	44870
	A	Phillip	Bouckaert	2999		12 Ironwood Wary N	Palm Beach Gardens	FL	33418
	A	Curt	Cobler	54279		1252 Hollyhill Drive	Miamisburg	OH	45342
	A	Patty	Cobler	54280		1252 Hollyhill Drive	Miamisburg	OH	45342
	A	Paul D	Fettrow	17876		94 Arlington Avenue	London	OH	43140
	A	Paulette	Gerz	67043		5 Winesap Ct	Chillicothe	OH	45601
	A	Eugene "Gene"	Hettel	30372		CPS IRR1 DAPO Box 7777	Metro Manila		Phillipines
	A	Kim	Hopsecker	54589		1304 S Clay Street	Troy	OH	45373
	A	Mark	Madigan	73129		4303 Virginia Drive	Fairview Park	OH	44126
	A	Gwen Mauger	Pahl	57276		733 Third Street	Findlay	OH	45840
	A	Rick	Reigle	44859		1787 Sedwick Avenue NW	Massillon	OH	44646
	A	Jim	Schall	34961		1541 Harding Drive	Wickliffe	OH	44092
	A	Pete	Schanz	73153		798 N Summit Street	Barberton	OH	44203
	A	William G	Selsam	14025		4755 Powderhorn Lane	Westerville	OH	43081
	A	Steve	Smith	16597		14240 Windsor Heights Road	Mt Vernon	OH	43050
	A	Shannon	Trego	73107		6750 Coronado Circle	Huber Heights	OH	45424
	A	Teresa	Wells	66770		7096 Pineview Drive	Huber Heights	OH	45424
	D	JENNIFER	COCHRAN	72143		25 CLAYBURNE BLVD APT D	CHILLICOTHE	OH	45601
	D	Thomas	CUMMINGHAM	55828		DECEASED			
	D	ALAN HOUSTON	HUSSER	65489		1705 TEXAS AVENUE	MIDDLETOWN	OH	45042
	D	TODD	STEPP	61168		7823 PRIESTLEY DRIVE	REYNOLDSBURG	OH	43068
	D	VICTORIA	VILLARREAL	72142		32 N SHORE DRIVE	CHILLCOTHE	OH	45601
	D	DONALD	WYSONG	46418		DECEASED			
	C	Don	Baird	58538	300				
	C	Faith Finnicum	Barbato	66632		1695 Pekin Drive SE	East Canton	OH	44730
	C	Joe	Callison	71418	296				
	C	KRISTI	CALLISON	69284	295	was Kristi Chillcoat			
	C	PAMELA	CYNGIER	70490			Brooklyn		
	C	Richard	Kutschbach	67838	297				
	C	Angela	Lochbaum	72881	298				
	C	Annette	Neff (was Turner)	64570	275	PO Box 858	Mountain Home	NC	28758
	C	George	Randa	23990	288				
	C	Melissa	Schnipke	70590	284				
	C	Dan	Szagal	66180	290				
	C	Marie	Thomas	65886	299				
	C	Michele	Tomer	70491					
	C	Ronald L	Trego	39782	97	6750 Coronado Circle	Huber Heights	OH	45424
		Note Dan	Moody	61218		Currently trying to find a good address. Please leave blank until further notice			

**US JCI SENATE
 QUARTERLY DUES BILLING COVER SHEET - DUES PAYMENT REMITTANCE FORM**

- Use the Add/Drop/Change (A/D/C) form to add new members (including those members who may have been dropped on previous dues billing). Please mark the member of another state column if necessary. Be sure to put the notation "Add" in the A/D/C column.
- Please list the members who should be dropped on the Add/Drop/Change form with the notation "Drop" in the A/D/C column. Only members due this quarter may be dropped **including deceased members**. If a member is not listed to be dropped on that form it will be presumed that they are to be renewed.
- This form should also be used to change any of the listed information about current members (addresses, correct spelling on names, etc.) on your state roster. Place the notation "Change" in the A/D/C column with the change being highlighted.

Send completed Cover Sheet and Add/Drop/Change form electronically to the Membership Information Services Program Manager and Mail this cover sheet (Only) and Dues payment check for the amount due to the US JCI Senate Treasurer by date listed:

FIRST QUARTER
 SEPTEMBER 1, 2017

SECOND QUARTER
 DECEMBER 1, 2017

THIRD QUARTER
 MARCH 1, 2018

FOURTH QUARTER
 JUNE 1, 2017

Gary Pittenger #24804
 Membership Information Services
 338 S. Nebraska - Morton, IL 61550
 Phone: (309-472-6464 (C)
 Email: gpitt1@comcast.net

Lawrence Pittman #53932
 Treasurer US JCI Senate
 P.O. Box 13295 – Durham, North Carolina 27709
 Phone: (828) 230-4944 (C)
 Email: usjci_pittman@charter.net

MEMBERSHIP RENEWAL INFORMATION

State: _____ Date Mailed: _____

Person submitting the dues kit: _____

Number of Members Due: _____

Number of Members Dropped: _____

Number of Members Renewed: _____ @ \$5.00 = \$_____ .00

Number of New Members: _____ @ \$5.00 = \$_____ .00

Total payment due: \$_____ .00

FOR US JCI SENATE TREASURER'S USE

Check Number: _____ Check Amount: _____

Date Received: _____ Date Deposited: _____

PLEASE MAKE CHECKS PAYABLE TO US JCI SENATE

MENTORS

Mentors is the official publication of the US JCI Senate. It is published and distributed 3 times per Senate year in; September, December, and April

As State Treasurer, it is important for you to know the following about Mentors:

1. Mentors is mailed to every Senator who is a current dues paid member.
2. The US JCI Senate Membership Information Services Program Manager supplies the Mentors publisher a mailing list for the purpose of printing mailing labels for the magazine. **Note:** The mailing label information comes directly from your roster. If information is wrong on your roster then there is a good chance your members will not receive their Mentors. Remember to use the Add / Change form to ensure everyone receives their Mentors.
3. The mailing label information is sent to the publisher approximately 4 weeks before distribution.
4. The printer for Mentors checks for the accuracy of addresses and notifies the Membership Information Services Program Manager of any bad addresses, who will, in turn, notify each affected state treasurer.
5. Mentors has an Editor and a Business Manager.
 - o Mentors Editor: Receives all the written text for the magazine and assembles it for publication.
 - o Mentors Business Manager: Collects all monies for meeting / event sponsorships and display ads. Promotes the sale of advertising in the magazine.

States are encouraged to sponsor an ad for every meeting or event conducted by your state Senate organization.

To place a meeting/event sponsorship follow these steps:

1. Staple a sign-up sheet (**Mentors Sponsor Sheet**) to a large (10 x 13) envelope.
2. During the meeting/event pass around the envelope encouraging each member and guest to sign the sheet – please print clearly - and place a minimum donation (\$2) inside the envelope.
3. After the meeting/event is over you will need to count the money collected and write a check, payable to the US JCI Senate, for that amount.
4. Send the sign in sheet(s) and the check to the US JCI Senate Mentors Business Manager
Susan Hatcher #58143
532 Woodlyn Crossing
Ballwin, MO 63021
Phone #: (636) 391-0787 (H)
(314) 570-0482 (C)
Email: s-hatcher@sbcglobal.net
5. Remember: Any checks or money orders are to be made out to the US JCI Senate.
6. Pictures are also encouraged and they may be sent electronically to the Mentors Editor; be sure to identify the subject(s) with their senate number and the occasion. Pictures can be sent to: mentorseditor@aol.com

HELPFUL HINTS

1. Always keep a copy of any correspondence – this includes dues billings!
2. Have your State President send out a pre-renewal letter 12 weeks prior to the due date encouraging members to renew and/or purchase a life membership (if applicable). Be sure to include information about upcoming Senate activities and other reasons to renew their membership (see Examples D and E). Provide a pre-addressed envelope with the letter in order to make it effortless for them to renew! This has been very successful for many states.
3. Pay the bills and make deposits in a timely manner.
4. Develop some sort of receipt voucher process (**Check Request Form**) to make it easier for you and to ensure clarity during an annual audit of the books.
5. Prepare an annual budget and have it approved at the first meeting of the year and send US JCI Senate Treasurer a copy if you wish.
6. Provide written financial reports at every meeting.
7. Establish a Finance Committee or elect or appoint an Associate Treasurer to maintain the integrity of the financial situation of your state.

EXAMPLE C: POST CARD MENTORS NOTIFICATION

Dear Senator:

In accordance with our US JCI Senate membership records, you have become a member of another state Senate organization. According to our by-laws, you are entitled to receive a copy of The Mentors for each state to which you belong.

This notice is to make you aware that you are entitled to receive multiple copies or you have the option to decline the additional copies. Should you decide not to receive additional copies, you need not do anything further and you will continue to receive one copy. If you wish to receive the additional copy of Mentors, please send me an email at jcimemberservices@gmail.com to confirm your decision.

If I do not receive a response from you within 30 days, I will accept your decision to decline the additional copy.

Gary Pittenger #24804
Membership Information Services Program Manager
US JCI Senate

_____ **JCI SENATE**

CHECK REQUEST FORM

Date: _____ Amount: _____

Requested by: _____

Project or Purpose of Request: _____

Description of Purchase: _____

Make Check Payable to: _____

Send Check to: Address: _____

City, State Zip: _____

Phone Number to Contact for Any Questions: _____

E-Mail Address to Contact for Any Questions: _____

For Treasurer's Use Only

Approval Authorization To Pay

Check Number: _____

President: _____

Date Paid: _____

Treasurer: _____

Check Amount: _____

Voted on at General Meeting Yes No

Motion By: _____

Approved as part of Budget: Yes No

Seconded By: _____

Approved: Yes No

**ATTACH ALL RECEIPTS SUPPORTING PURCHASE TO THIS FORM. RECEIPTS MUST
TOTAL AT LEAST THE AMOUNT REQUESTED.**

EXAMPLE D: PRESIDENT'S MEMBER DUES LETTER

(Should be mailed to members 90 days prior to their renewal date)

Date _____

Dear Senator:

I am excited to be serving as President of the XYZ JCI Senate for the 2014-2015 year. The Board of Directors has planned a full calendar of events for the year and hope that you will be part of the fun and fellowship. I would like to ask you to renew your membership for this coming year. For \$\$\$, you will continue to be an active member of the XYZ JCI Senate and the US JCI Senate. Some of our upcoming activities and benefits for continuing your membership include: (List a few of your upcoming events/services)

(If Applicable – include information on your Lifetime Membership Program)

For more information on our upcoming events, please visit the XYZ JCI Senate website at www.xyzjcisenate.org, or contact me at (123) 456-7890,

To continue your membership, please complete the form below and mail it with your \$\$\$ check **by Your Deadline Date** to our Treasurer, Milburn Pennybags, at the address listed below.

Sincerely,

Your Name, #99998
President 2015-2016

Name: _____ Senate Number: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Cell Phone: _____

E-mail Address: _____

- Are you willing to be a resource for the XYZ Jaycees (training, mentoring, recruiting, etc.)?
 YES NO
- I prefer to receive the newsletter via Regular Mail (versus email)
 YES NO
- I would like to make a donation to: (include any state-wide emphasis project, foundations or other programs which may be appropriate for your state) Amount: \$ _____ .00
- I would like to support the USJCI Senate Foundation scholarship efforts by becoming a Foundation Member: YES NO (Forward affirmative responses to Earl Sawyer)

Please make your check payable to XYZ JCI Senate and mail by Your Deadline Date to:

Milburn Pennybags #99999
XYZ JCI Senate Treasurer
109 Park Place
Monopoly City, XY 98765
(987) 654-3210

EXAMPLE E: PRESIDENT'S MEMBER DUES FOLLOW-UP LETTER

(Should be mailed to members 60 days prior to their renewal date)

DATE

Fellow Senator,

Like me I'm sure you can recall the exact moment you first realized it was YOU they were talking about as the list of offices, accomplishments and projects were read for the next person being honored by their chapter with the highest honor a Jaycee could receive, a JCI Senatorship. Today, while the number of JCI Senatorships bestowed worldwide is over 70,000, we still make up less than 1% of all people who have been Jaycee. You truly are the cream of the crop!! The XYZ JCI Senate has a priority this year to reach out to those who have not been members to encourage them to rejoin our ranks as an active JCI Senator and member.

While the Senate will continue to be a social organization that allows us to continue the friendships that we cultivated when we were Jaycees, an additional initiative this year will be to help support the XYZ Jaycees and our local chapters. Over the last several years the XYZ Jaycees' membership, as well as Jaycee membership nationwide has decreased. While there are many reasons for this, the fact remains that the Jaycees are still THE organization for young people who want to create positive change and foster leadership training through community service. The XYZ Senate is committed to offering to provide needed mentoring, advice, success stories and more in order to help the XYZ Jaycees succeed in achieving their goals this year and into the future. We are asking you to help, by not only renewing your membership in the Senate, but also sharing your ideas and thoughts. Hopefully, you'll remember the first time a Senator took a moment of their time to recognize you. Those moments are priceless to the Jaycees.

We made things happen as Jaycees. We can continue to do the same as Senators. I hope that you will join me and your fellow JCI Senators in giving back to the Jaycees and having fun in the process...what more can we ask for?

Sincerely,

Your Name, #99998
President 2015-2016

P.S. Attached is a copy of the dues letter that you should have received before. This will give you more information about what the upcoming year for the XYZ JCI Senate.