

**INSTRUCTIONS FOR PREPARING REPORT OF SHRINE CLUBS AND  
TEMPLE UNITS**

**\*\*\*IMPORTANT\*\*\*** The report should be started by completing the Fund Raising Events schedule, then the Contributions & Transfer to Temple schedule as the totals from these schedules will flow to the Annual Report. The color shaded boxes will automatically fill with totals or amounts from the Fund Raising Event and Contributions & Transfer to Temple schedules. If you enter amounts in colored boxes the automatic features will be removed.

All information on this report complies with the Internal Revenue Service requirements for maintaining Shriners International group exemption, in addition to, complying with the Statement of Financial Position per section 336.3 and 337.8 of the bylaws. The report is an EXCEL spreadsheet and is available online at [www.zuhrahshriners.com](http://www.zuhrahshriners.com). If you complete the report electronically it will automatically calculate totals; as the file includes ALL applicable formulas. You are not required to precede any amounts by a minus sign unless indicated. Mail the original to the Zuhrah office at 6120 Blue Circle Drive, Minnetonka, MN 55343 by February 1st and keep a copy for your records.

**Verify the following before you begin:** The amount entered for "Balance Beginning of Year" in the Net Assets section, **must agree** with the amount reported for "Balance End of Year" on the prior year's Club and Unit report.

**Verify the following before submission to the temple:** When the surplus/(deficit) in the Statement of Activities for the current year is added to or deducted from the Net Assets "Balance Beginning of Year," the result represents the Net Assets "Balance End of (current) Year". **Total Assets must equal Total Liabilities & Net Assets (a=b+c).**

**NOTE:** Detailed backup should be attached to this report for the accounts indicated by an **asterisk**".

General Order No. 1 does not allow net proceeds from charitable fundraisers to be held by a club or unit. General Order No. 1 states that up to ½ net proceeds may be requested to be held by a temple to be used exclusively for hospital patient transportation expenses. The results of all charitable fundraising activities must be reported to Zuhrah's Potentate on the Charity Activity Form and submitted to the EVP - Shriners International within sixty days of the event. A club or unit is not permitted to maintain a separate Shrine Hospital Patient Transportation Fund.

I hereby declare under the penalties of perjury that this authorization (including any accompanying schedules and statements) has been examined by me and to the best of my knowledge and belief is true, correct and complete and made in good faith. If this report is for a Club, I authorize Zuhrah to include this financial information on Zuhrah's annual group Form 990.

Signature of preparer	Printed name	Date	Phone number
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President of Unit or Club	Printed name	Date	Phone number
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