



SONS of NORWAY

District 6

New Governance System How Did We Get Here?

Fraternal Benefit Societies

They are tax exempt as recognized not-for-profit 501(c)(8) organizations but are regulated by state insurance and/or commerce departments.

Fraternal benefit societies are not-for-profit membership groups that unite individuals with a common bond, providing them the ability to secure their families' financial security through a variety of life insurance and investment products.

Convention Governance

~ 150 delegates to Int'l Lodge Meeting/Convention
Meet every two years

vs

Board of Directors Governance

Small board of directors elected by a potential
tens of thousands of policy holders
Meet often and as needed



Voting paddles at Int'l Lodge Meetings/Conventions

CANDIDATE QUALIFICATIONS

Under BOD Governance System

- Accounting/audit
- Actuarial
- Legal
- Investment
- Insurance management
- Corporate management/governance
- Marketing and communications
- Strategic planning
- Technology skills (internet/social media)
- Human resources
- Community service/volunteering
- Fraternal benefit system

CANDIDATE QUALIFICATIONS

Under Old Convention Governance System

None

Generally by lodge or district position
Generally by familiarity with candidates
and their known activities in the district



Financial

Protect those you love with a financial safety net

- **Life Insurance** – term and whole options
- **Annuities** – an investment designed for protection from market risk and guaranteed rate of return
- New products available
- Financial reviews and competitive insurance & annuity products



Foundation

Share your Nordic values by supporting community outreach and education

- **Scholarships** – supports promising students in higher education around the world
- **Heritage & Culture Grants** – grants that provide funding for Norwegian-themed programming
- **Humanitarian Grants** – grants that support members facing medical or disaster relief needs
- **Philanthropic promotions and donations** – donating to the Sons of Norway Foundation, a 501(c)(3) organization, contributes to the positive impact we make through community, youth, educational, and cultural projects
- **Sharing our mission and core values** – engage others in the good work of the Sons of Norway Foundation



Fellowship

Connect with others as you explore Norwegian heritage and culture

- Community of members in lodges, districts, nationally, and internationally
- Visit any lodge in the organization
- Participation in district events
- Free Heritage membership





Heritage & Culture

Explore riches of Norwegian heritage and Nordic culture

- **Cultural Skills Program** – learn about and practice traditional and contemporary Norwegian cultural skills
- **Norwegian Language Lessons** – designed for beginners with written and audio components
- **Sports Medal Program** – maintain an active life
- **Recipes** – tickle your tastebuds with traditional and new favorites
- **Language & Heritage Camps** – youth, adult, and family opportunities
- **Genealogy Guide** – Get in touch with your Norwegian heritage
- **Lodge & District Cultural Events** – participate in local lodge events, classes, and fundraisers
- **Idea & Information Bank, Mini Presentations** – website resources for lodges and individuals to explore
- **Just for Kids** – engage your youth in Norwegian heritage and culture

Publications

Enjoy award-winning content and useful information

- **Viking Magazine** – immerse yourself in the world of Scandinavian heritage, tastes, history, events and personalities with every new issue, archived issues found on the website as well
- **Newsletter Service** – content provided for lodges to include in their newsletters
- **E-post** – electronic newsletter to members and non-members with culture content, articles, recipes, and news

Resources & Perks

Benefit from being a Sons of Norway member

- **PerkSpot** – save on products and services like travel, food, clothing, entertainment, and electronics
- **Films of Norway** – 1 free week and 25% off subscription rate for streamed Norwegian movies and TV series
- **Avis & Budget car rental** – 30% discount at participating locations worldwide
- **Best Western Hotels** – up to 10% at BW hotels in the US, Canada, and select properties in Scandinavia
- **Radisson Hotels** - 5% off the regular rate at Radisson Blu, Radisson®, Country Inns & Suites By Radisson, Park Inn by Radisson, and Park Plaza® hotels
- **Norwegian Map Service** - plan your travels in Norway using one or all of the detailed and useful road maps



2025 Compliance Requirements

ITEM	DUE	NOTES
D-17 (All Lodges)	March 15*	<ul style="list-style-type: none"> This is the year-end lodge financial report for all lodges Filled out by Lodge Treasurer, signed by Lodge President and Chief Auditor (all three must sign) Completed online from profile page How to do the form: D17 Instruclons
Lodge Achievement Survey**** (All Lodges)	March 15	<ul style="list-style-type: none"> Separate survey for each country Helps qualify Lodge Achievement Award winners Available on the website via SurveyMonkey in January
Family Lodge of the Year Survey**** (All Lodges)	March 15	<ul style="list-style-type: none"> Separate survey for each country Helps qualify Lodge Achievement Award winners Available on the website via SurveyMonkey in January
AFA ReporFng**** (All Lodges)	March 15	<ul style="list-style-type: none"> Data Sons of Norway is required to report to the American Fraternal Alliance annually Available on the website via SurveyMonkey in January
D-64 (Lodges w/ Property)	March 15	<ul style="list-style-type: none"> Updates lodge property officer informaJon Updated through officer profile page
D-18 (Lodges w/ Property)	May 15*	<ul style="list-style-type: none"> Year-end financial report for Lodge Property AssociaJon Access from the Lodge Treasurer's profile page
990 Form (US lodges only)	May 15**	<ul style="list-style-type: none"> Most lodges can complete the 990N postcard online on the IRS website. Lodges with an average income of \$50K or more will need to complete the 990E or 990 form. Send copy to taxinfo@sofn.com Refer to IRS website for assistance
Lodge Liability Insurance (US and Canada Lodges)	November 15*	<ul style="list-style-type: none"> Invoices uploaded to officer profiles in Sept/Oct Make check payable to Sons of Norway Late checks will incur a fee, and dues withheld
D-63 (All Lodges)	December 31	<ul style="list-style-type: none"> To update lodge officers for coming year Updated through officer profile SJll go in and elect that there are no changes for upcoming year if officers are conJnuing in role Finalized in system by January 15
Record RetenFon	On-going	<ul style="list-style-type: none"> Lodge Record RetenJon Guidelines

*Failure to submit these on Fme will result in dues beings withheld.

**Failure to file the 990 for three consecuFve years will result in loss of non-profit status.

***Contact fraternal@sofn.com with quesFons or for assistance.

****AddiFonal informaFon about surveys found on the *Lodge Forms* secFon of the website.



SONS of NORWAY

District 6

Sons of Norway contact information

<p>Member support including updates with membership and/or insurance such as new address or adding/deleting members</p>	<p>Email: cbs@sofn.com (preferred) Call: 800-945-8851, and select #1</p>
<p>Submitting death of a member</p> <p>Remember, In Loving Memory has shifted to an online location at sofn.com/inlovingmemory/</p>	<p>Please submit member's info (name, city and state) to the lodge's membership or financial secretary. OR Email: cbs@sofn.com Please include full name, date of death, city and lodge number if possible</p>
<p>Insurance & Sales Lori Gubash, <i>Sales Director</i> Ryan Bernard, <i>Internal Wholesaler</i></p>	<p>Email: sales@sofn.com</p>
<p>Fraternal Connie O'Brien <i>Director of Fraternal & Foundation Development</i> cobrien@sofn.com Or Kirsten Lehman <i>Fraternal Membership Engagement Manager</i> klehman@sofn.com</p>	<p>Email: fraternal@sofn.com (preferred) taxinfo@sofn.com (D17/D18/990)</p>
<p>Foundation Amy Tuchenhagen <i>Director, Sons of Norway Foundation</i> atuchenhagen@sofn.com</p>	<p>Email: foundation@sofn.com scholarship@sofn.com</p>
<p>Viking magazine Jana Velo <i>Fraternal Manager & Viking Content Editor</i></p>	<p>Email: jvelo@sofn.com</p>
<p>Culture Jana Velo <i>Fraternal Manager & Viking Content Editor</i></p>	<p>Email: culture@sofn.com</p>
<p>Options for our Customer Service line:</p>	<p>Call 800-945-8851 Press: 1 for Customer Service for Membership and Insurance 2 for Insurance Sales 3 for New Business support 4 for Insurance licensing 5 for Commissions 6 for Lodge officer support</p>