

July
Mother
2015

Nov 7,
2015

EXHIBIT A

Officers		Friday	Meeting		Saturday	Meeting
		Present	Absent		Present	Absent
President	M.K.G.	✓			✓	
Executive Vice-President	R.B.	✓			✓	
Vice-President North	D.B.	✓			✓	
Vice-President South	J.F.	✓			✓	
Vice-President Membership	P.H.	✓			✓	
Secretary	D.B.	✓			✓	
Treasurer	B.T.	✓			✓	
Registrar	O.S.	✓			✓	
Chancellor	J.G.		✓			✓
Genealogist	T.B.	✓			✓	
Historian	J.B.	✓			✓	
Chaplain	L.C.	✓			✓	
Surgeon	E.L.		✓			✓
Investment Fund Trustee	R.H.	✓			✓	
Investment Fund Trustee	S.R.	✓			✓	
Investment Fund Trustee	J.D.	✓			✓	
National Trustee	JIM FAULK.				✓	
Chapters			✓			
Butte			✓			✓
Central Coast			✓			✓
Coachella Valley		✓			✓	
Delta			✓			✓
Eagle		✓				✓
General George Patton		✓			✓	
Gen. George Washington		✓			✓	
Gold Country		✓			✓	
Harbor		✓			✓	
Kern			✓		✓	
Monterey Bay			✓			✓
Mother Lode			✓			✓
Orange County		✓			✓	
Redding			✓			✓
Redlands			✓		✓	
Redwood Empire		✓			✓	
Riverside		✓			✓	
Sacramento		✓			✓	
San Diego		✓			✓	
San Francisco		✓			✓	
Santa Barbara			✓		✓	
Silicon Valley		✓			✓	
Sons of Liberty		✓				✓
South Coast			✓			✓
Thomas Jefferson		✓			✓	
Yosemite			✓			✓

State Society Member Count

11/2/2015

Active members to date

2	AK	38	AL	1,139	AR	321	AZ	511	
CA	<u>1,902</u>	CN	40	CO	368	CT	570	DA	109
DC	353	DE	261	EC	1	ES	10	<u>FL</u>	<u>2,131</u>
FR	726	<u>GA</u>	<u>1,819</u>	GE	10	HI	23	IA	195
ID	92	IL	1,083	IN	783	IT	17	KS	724
KY	1,071	LA	592	MA	497	MD	878	ME	175
MI	425	MN	206	MO	646	MS	436	MT	66
MX	1	NC	1,067	NE	115	NH	135	NJ	565
NM	112	NV	176	NY	1,295	<u>OH</u>	<u>1,746</u>	OK	345
OR	153	<u>PA</u>	<u>1,804</u>	RI	147	SC	881	SW	7
TN	1,287	<u>TX</u>	<u>2,660</u>	UK	13	UT	135	<u>VA</u>	<u>2,056</u>
VT	126	WA	426	WI	197	WV	500	WY	104

Total: 34,273

151 TX 2660
 2 FL 2131
 3 VA 2056
 4 CA 1902
 5 GA 1819
 6 PA 1804
 7 OH 1746



The Ca Sons of the American Revolution

Instituted October 22, 1875
Organized July 4, 1876, Incorporated

ROBERT L. TAYLOR
Treasurer
5277 Shiloh Way
Ventura, CA 93003-7351
(805) 216-7992
Tartar-taylor@att.net

EXHIBIT C

TREASURER'S REPORT JANUARY 1 TO OCTOBER 31, 2015 YEAR-TO-DATE ACTUAL COMPARED TO FULL-YEAR BUDGET

The following are the operating receipts and expenses as of October 31, 2015 compared to the full-year budget:

	YTD 10/31/2015	FY 2015 Budget	Variance To Budget
INCOME STATEMENT			
RECEIPTS			
I-01 · Annual Dues Received - CASSAR	\$ 21,318	\$ 23,360	\$ (2,042)
I-01 · Annual Dues Received - NSSAR Pass Through	\$ 32,491	\$ 41,550	\$ (9,059)
I-03 · LM Annual CASSAR Dues	\$ 5,540	\$ 6,360	\$ (820)
I-03 · LM Annual NSSAR Pass Through Dues	\$ 9,180	\$ 9,300	\$ (120)
I-04 · LM Dues for Chapters Pass Through	\$ 3,080	\$ 3,180	\$ (100)
I-05 · New Member State Fee	\$ 3,305	\$ 5,200	\$ (1,895)
I-06 · Supplemental App State Fee	\$ 670	\$ 900	\$ (230)
I-08 · Bank Account Interest	\$ 6	\$ 2	\$ 4
I-09 · Reinstated Member Fee	\$ 1,050	\$ 720	\$ 330
I-14 · Interest Income-San Diego Fund	\$ 834	\$ 1,250	\$ (416)
I-16 · LM Accounts Receivable	\$ 1,480	\$ 2,500	\$ (1,020)
I-17 · Income from Other Sources	\$ 420	\$ -	\$ 420
I-18 · Transfer From Education Fund	\$ -	\$ 1,500	\$ (1,500)
I-21 · Income from Medals & Certs	\$ -	\$ -	\$ -
I-25 · Donations	\$ 420	\$ -	\$ 420
I-26 · Compatriot Subscription Fees	\$ 45	\$ 105	\$ (60)
I-61 · 2014 Bd of Mgrs Conference	\$ 5	\$ -	\$ 5
Total Receipts	\$ 79,844	\$ 95,927	\$ (16,083)
OPERATING EXPENSES			
Executive Committee Expenses			
A-01 · President Expenses	\$ 231	\$ 500	\$ (269)
A-02 · Executive VP Expenses	\$ -	\$ 300	\$ (300)
A-03 · VP North Expenses	\$ -	\$ 100	\$ (100)
A-04 · VP South Expenses	\$ -	\$ 100	\$ (100)
A-05 · VP Membership Expenses	\$ 189	\$ 1,000	\$ (811)

A-06 · Executive Secretary Expenses	\$ 1,051	\$ 1,600	\$ (549)
A-07 · Treasurer Expenses	\$ 127	\$ 300	\$ (173)
A-08 · Registrar Expenses	\$ 732	\$ 600	\$ 132
A-09 · Genealogist Expenses	\$ -	\$ 100	\$ (100)
A-11 · Chancellor Expenses	\$ -	\$ 100	\$ (100)
A-12 · Historian Expenses	\$ -	\$ 100	\$ (100)
A-14 · Chaplain	\$ -	\$ 100	\$ (100)
Total Exec. Committee Expenses	\$ 2,330	\$ 4,900	\$ (2,570)
Committee Expenses			
B-21 · Awards & Medals Com	\$ 1,042	\$ 1,300	\$ (258)
B-22 · Best Chapter Contest	\$ 381	\$ 650	\$ (269)
B-24 · New Chapter Assistance	\$ -	\$ 250	\$ (250)
B-27 · Poster Contest	\$ 932	\$ 850	\$ 82
B-29 · Brochure Contest	\$ 933	\$ 950	\$ (17)
B-30 · Oration Contest	\$ 1,700	\$ 1,770	\$ (70)
B-33 · JROTC Committee	\$ 1,501	\$ 1,770	\$ (269)
B-34 · CAR Expenses	\$ 672	\$ 1,000	\$ (328)
B-35 · Eagle Scout Contest	\$ 1,317	\$ 1,770	\$ (453)
B-39 · Essay Contest Expenses	\$ 1,174	\$ 1,770	\$ (596)
B-41 · Spring Meeting Allowance	\$ 300	\$ 300	\$ -
B-42 · Fall Meeting Allowance	\$ 300	\$ 300	\$ -
B-43 · BOM PG Expenses	\$ 652	\$ 1,900	\$ (1,248)
B-44 · Sea Cadets	\$ -	\$ 300	\$ (300)
B-60 · Valley Forge Contest	\$ 3,800	\$ 3,800	\$ -
Total Committee Expenses	\$ 14,704	\$ 18,680	\$ (3,976)
Program Expenses			
C-45 · California Compatriot	\$ 1,035	\$ 1,100	\$ (65)
C-49 · CASSAR Flag Expenses	\$ 360	\$ 400	\$ (40)
C-50 · Congress Hospitality Suite	\$ 750	\$ 750	\$ -
Total Program Expenses	\$ 2,145	\$ 2,250	\$ (105)
Other Operating Expenses			
E-01 · Annual Dues to NSSAR	\$ 44,360	\$ 50,850	\$ (6,490)
E-02 · LM Dues to Chapters	\$ 3,080	\$ 3,180	\$ (100)
E-03 · Filing Fees	\$ 50	\$ 55	\$ (5)
E-10 · Liability Insurance Expenses	\$ 519	\$ 890	\$ (371)
E-11 · D&O Insurance	\$ 945	\$ 1,400	\$ (455)
E-30 · Storage Rent & Supplies	\$ 552	\$ 550	\$ 2
E-40 · Other CASSAR Expenses	\$ -	\$ 2,000	\$ (2,000)
E-55 · The SAR Foundation	\$ 1,000	\$ 1,000	\$ -
E-70 · Richard F. Locke Award	\$ 1,250	\$ 1,250	\$ -
T-10 · State & Federal Taxes	\$ -	\$ 25	\$ (25)

Total Other Operating Expenses	\$ 51,756	\$ 61,200	\$ (9,444)
Total Operating Expenses	\$ 70,935	\$ 87,030	\$ (16,095)
Operating Surplus/(Deficit)	\$ 8,909	\$ 8,897	\$ 32,178
T-10 • State & Federal Taxes	\$ -	\$ 25	\$ (25)
Net Operating Surplus/(Deficit)	\$ 8,909	\$ 8,872	\$ 32,153
E-51 • Transfers to Invest Accounts			
Congress Fund	\$ 2,000	\$ 2,000	\$ -
SD Education Fund	\$ 834	\$ 1,250	\$ (416)
Life Member Fund – New Members	\$ 1,480	\$ 2,500	\$ (1,020)
Total	\$ 10,248	\$ 5,750	\$ 4,498
Net Surplus/(Deficit)	\$ 17,203	\$ 3,122	\$ 21,463

Notes to Income Statement:

1. Receipts – major contributors to the shortfall of actual to budget (\$16,083):
 - a. Receipts for regular annual dues were below budget by \$2,042.
 - b. New Life Member Fees are \$1,020 below budget – 3 new life member dues have been received this year, showing a positive trend.
2. Expenses – total operating expenses are below budget by \$16,095. Most expenses are incurred during the first four months of the year when the Spring BOM meeting is held, and during the last quarter of the year after the Fall BOM meeting. Therefore, this positive variance will reduce during the remainder of 2015. It is expected that the year will end with expenses being lower than budgeted.

Transfers To – From the Investment Account – Year-to-Date \$10,248 (\$8,768 + \$1480) have been transferred to the investment account. Transfers from the money market account to the CASSAR checking account are \$19,402. Of these transfers-from, \$12,320 pertain to life member dues that are submitted to National and State Chapters for 2015 Life Member dues.

	Amount
Transfer-to Investment Funds	
Congress Fund	\$ 2,000.00
Donations YTD Oct 2015	\$ 25.00
Intel Donation (D Littlefield)	\$ 360.00
SD Fund Interest 04/07/2014	\$ 834.26
2015 Non-LM Fees @ \$2.00	\$ 3,302.00
Life Member Fund – New Members	\$ 1,480.00
2015 New LM Fees Received	\$ 384.25
2014 LM Fees Received Dec 2014	\$ 350.58
Other	\$ -
Total Transfer-to Investment Funds	\$ 10,247.83

Transfer-from Money Market Funds

CASSAR LM Dues	\$ 5,544.00
CASSAR Emeritus	\$ 30.00
CASSAR Dual	\$ 18.00
NSSAR LM Dues	\$ 9,240.00
Chapter LM Dues	\$ 3,080.00
Chapter Dual	\$ 10.00
Total Transfer-from Money Mkt Funds	\$ 17,922.00
Net Transfer-From/(To)	\$ 9,037.33

The Balance Sheet as of October 31, 2014 shows the following balances:

Assets:

Cash and Savings Account (BofA)	\$ 52,942
Investment Account – Morgan Stanley	\$ 343,932
Total Assets	\$ 416,134

Liabilities	\$ -0-
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Equity

Equity Accounts	\$ 274,493
Retained Earnings	\$ 141,641
Total Equity	\$ 416,134

TRUSTEES of the CASSAR INVESTED FUNDS

CASSAR Board of Managers Meeting

October 31, 2015

The elected Trustees of the CASSAR Invested Funds are Richard S. Hawley (2013-2015), John Dodd (2015-2017), and Chairman Stephen Renouf (2014-2016).

The Fund is invested with Morgan Stanley Smith Barney (MSSB) in five separate funds: the Life Membership Fund, the Education Fund, the Permanent Fund, the 2019 Congress Fund, and the Unallocated Fund. The signers on the account are the three trustees.

The beginning value of the Invested Fund on October 31, 2014:
\$356,185.05

The ending value of the Invested Fund on October 31, 2015:
\$361,713.16

Fund Investment as of October 31, 2015:

Life Membership Fund: \$195,532.57

Target Allocation:

Money Market

7% Money Market

Equity

12% US Large Growth Equity

14% US Large Value Equity

7% International Equity

3% Emerging Markets Equity

3% Commodities

9% US Small Core Equity

Fixed Income

25% US Short-Term Fixed Income

18% US Core Fixed Income

Other

2% REITs

Fixed Income	\$84,576.15	43.25%
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Equities	\$85,806.13	43.88%
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Cash	\$15,629.91	7.99%
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Alternatives	\$9,520.38	4.87%
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Investment style: Conservative to Moderate Risk.

Report of CASSAR Trustees October 2015

Permanent Fund: \$92,308.21

Target Allocation:

Money Market

5% Money Market Funds

Equity

15% US Large Growth Equity

18% US Large Value Equity

5% US Small Value Equity

14% International Equity

4% Emerging Markets Equity

4% Commodities

5% US Small Core Equity

Fixed Income

15% US Short-Term Fixed Income

10% US Core Fixed Income

Other

5% REITs

Fixed Income \$23,295.57 25.24%

Equities \$54,890.57 59.46%

Cash \$5,945.17 6.44%

Alternatives \$8,176.90 8.86%

Investment style: Moderate to Moderate Aggressive Risk.

Education Fund: \$34,906.76

Target Allocation:

Money Market

7% Money Market Funds

Equity

12% US Large Growth Equity

14% US Large Value Equity

4% US Small Value Equity

7% International Equity

3% Emerging Markets Equity

3% Commodities

5% US Small Core Equity

Fixed Income

25% US Short-Term Fixed Income

18% US Core Fixed Income

Other

2% REITs

Fixed Income \$14,748.33 42.25%

Equities \$15,807.27 45.28%

Cash \$2,630.77 7.54%

Alternatives \$1,720.39 4.93%

Investment style: Conservative Risk.

Report of CASSAR Trustees October 2015

2019 Congress Fund: \$19,298.89

Target Allocation:

Money Market

7% Money Market Funds

Equity

12% US Large Growth Equity

14% US Large Value Equity

4% US Small Value Equity

7% International Equity

3% Emerging Markets Equity

3% Commodities

5% US Small Core Equity

Fixed Income

25% US Short-Term Fixed Income

18% US Core Fixed Income

Other

2% REITs

Fixed Income **\$8,275.18** **42.88%**

Equities **\$8,519.08** **44.14%**

Cash **\$1,551.90** **8.04%**

Alternatives **\$952.73** **4.94%**

Investment Style: Conservative Risk.

Unallocated Fund: \$19,666.73

Target Allocation:

Money Market

18% Money Market Funds

Equity

7% US Large Growth Equity

7% US Large Value Equity

1% US Mid Cap Growth Equity

1% US Mid Cap Value Equity

1% US Small Growth Equity

1% US Small Value Equity

8% International Equity

3% Emerging Markets Equity

Fixed Income

21% US Short-Term Fixed Income

21% US Core Fixed Income

5% International Fixed Income

2% Inflation Linked Securities

2% High Yield Fixed Income

2% Emerging Markets Fixed Income

Fixed Income **\$10,248.06** **52.11%**

Equities **\$5,499.83** **27.97%**

Report of CASSAR Trustees October 2015

Cash	\$3,918.84	19.93%
Alternatives	\$0.00	0.0%

Investment Style: Conservative Risk.

Recent Activity.

On April 24, 2015, Stephen Renouf and John Dodd had a phone conference with Morgan Stanley Advisor Sean Bell. The risk of the funds was discussed and re-evaluated. It was decided to rebalance to the target allocations. We discussed replacing Curtis Porter with John Dodd on the signature cards. We also discussed creating a new fund – the Unallocated Fund.

On May 8, 2015, the three trustees decided to switch from the TRAK Advisors Program to the Select UMA Program. All clients will eventually be converted to Select UMA, so it was decided to convert now. Select UMA gives us more investment vehicle options and better reporting.

During the period described above the accounts increased \$5,528.11 in value.

Trustee Management.

Your Trustees have continued their tripartite management style and are continuing to act cautiously in management of the Invested Fund. Accordingly, the Trustees will continue to move forward with moderate to conservative management in the best interests of the Society.

Trustees' Statement.

The trustees reiterate their pledge to the membership that their activities and management of the CASSAR Invested Fund will be transparent to the membership. No actions will or have been taken by the present Trustees without the full participation of all Trustees.

FOR THE TRUSTEES

S/
Stephen R. Renouf
Chairman

S/
Richard S. Hawley
Trustee

S/
John Dodd
Trustee

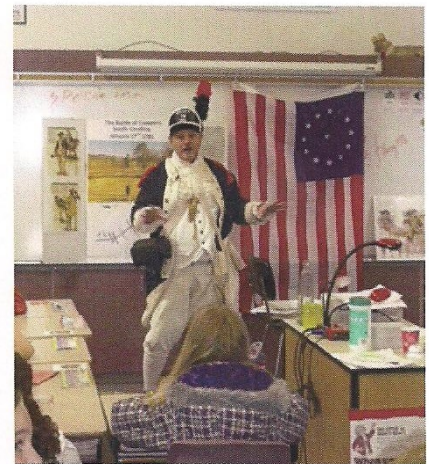
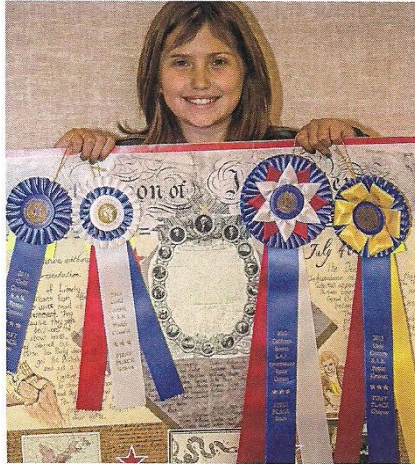
CALIFORNIA SOCIETY OF THE SONS OF THE AMERICAN REVOLUTION
Morgan Stanley Fund Accounts by Month
Year 2015

	DEC 2013	JAN 2015	FEB 2015	MAR 2015	APR 2015	MAY 2015	JUN 2015	JUL 2015	AUG 2015	SEP 2015	OCT 2015	NOV 2015	DEC 2015	TOTALS
LM Fund 244-022510-095														
Prior Balance														212,171.75
Deposits														
Gains														15,425.24
Withdrawals														14,797.17
Losses														15,208.41
Fees														2,058.84
Ending Balance	212,171.75	210,901.40	216,650.55	214,846.58	216,276.27	201,495.65	198,194.57	199,076.11	192,551.26	188,769.35	195,532.57	-	-	195,532.57
Education Fund 244-030129-095														
Prior Balance														32,854.29
Deposits														2,572.17
Gains														2,536.20
Withdrawals														
Losses														2,532.00
Fees														323.90
Ending Balance	32,854.29	32,418.46	33,315.98	33,852.44	34,076.53	34,987.02	34,489.57	34,554.78	33,454.84	32,836.58	34,906.76	-	-	34,906.76
Permanent Fund 244-030130-095														
Prior Balance														92,858.65
Deposits														645.00
Gains														9,529.28
Withdrawals														
Losses														9,790.99
Fees														933.73
Ending Balance	92,858.65	91,862.22	95,227.53	94,219.21	95,064.80	95,644.50	93,488.70	94,036.17	89,921.28	87,823.43	92,308.21	-	-	92,308.21
2019 Congress Fund 244-030131-095														
Prior Balance														17,493.35
Deposits														2,000.00
Gains														1,360.30
Withdrawals														
Losses														1,381.80
Fees														172.96
Ending Balance	17,493.35	17,360.93	17,811.86	17,668.62	17,825.18	19,818.36	19,595.61	19,582.55	18,965.65	18,611.92	19,298.89	-	-	19,298.89
Unallocated Fund 244-050390-095														
Prior Balance														
Deposits														
Gains														
Withdrawals														
Losses														
Fees														
Ending Balance														
TOTALS														
Prior Balance	355,178.04	352,543.01	363,005.92	360,586.85	363,242.78	371,945.53	365,768.45	367,131.95	354,284.86	347,220.27				355,178.04
Deposits														25,217.17
Gains														25,338.76
Withdrawals														14,797.17
Losses														29,622.57
Fees														3,601.07
Ending Balance	355,178.04	352,543.01	363,005.92	360,586.85	363,242.78	371,945.53	365,768.45	367,131.95	354,284.86	347,220.27	361,713.16			361,713.16
													FUND INCREASE/(DECREASE)	6,535.12



EXHIBIT E

Americanism Elementary School Poster Contest



This contest is open to grade school students studying the American Revolution. In California public schools, the American Revolution is normally taught in the 5th grade, but private and charter school may teach it in grades 4 through 6. Entries should be submitted to local SAR chapters through school classrooms, cub scouts or CAR members.

The 2016 Topic for California is

“Fort Ticonderoga’s Cannons & the Henry Knox Trail”

The inspiring story of how Continental Army Colonel Henry Knox and his men transported cannons that had been captured at Fort Ticonderoga to the Continental Army camps outside Boston, Massachusetts during the winter of 1775–1776

How the contest works:

1. Each local school winner will compete at the Chapter level.
2. Each Chapter winner will compete at the State level.
3. Once the State Society has selected a winner, that poster will compete at the National level.
4. Posters must be on a standard 22×28 inch poster board.
5. Posters should not be framed or enhanced in any way by the submitting Chapter.
6. No “3D” posters will be accepted.
7. The posters must conform to the yearly theme, be visually pleasing and show evidence of research.

Each Chapter may submit one poster for judging at the California SAR 2016 Spring Meeting. Please have posters at the Spring Meeting by 5:00PM Friday.

Voting by ballot takes place during the Saturday morning business session. The winner will be announced at the Saturday Luncheon.

Contact California SAR Poster Contest Chairman Dave Gilliard with questions: dave@gbacampaigns.com

**California Society Sons of American Revolution
Eagle Scout Committee**

Report 2015

Submitted by
Gary Jensen reporting Chairman
November 6, 2015

EXHIBIT F

Arthur M. & Berdena King Eagle Scout Scholarship

December 1st is the Dead Line for sumitting Applications for 2015.

Robert E. Burt Boy Scout Volunteer Award

The California Society can summit four (4) applications each year
We can summit two (2) additional applications for 2015
And four (4) for 2016

Eagle Scout Scholarship Committee Members

NEEDED

Your help is needed in being a judge for 2015 Eagle Scout Scholarship program. The committee members are needed for a short window from December 1st to January 15th. If interested in serving on the committees, contact Gary Jensen at: Gary@JensenMyWay.com

Boy Scouts of America Youth Protection Training

At the spring 2015 NSSAR Scout Committee meeting it was suggested that all SAR members that are working with **YOUTH** should take the Boy Scouts of America Youth Protection Training. This is an online Training course and there is no cost to take the training, it takes about 30 minutes to complete the course, nor do you need to register with the BSA. They offer the course to all that would like to take the training; the training is good for two (2) years. <https://myscouting.scouting.org>

Eagle Scout Certificates

110 Requests for Eagle Scout certificates were received
As of 1 November 2015
80 of the request were forwarded to 18 Chapters to fulfill

NSSAR Annual Report Scout Report

E-mail a report as the number of Eagle Scout Certificates issue/presented by the
Chapter for 2015

to

Gary@JensenMyWay.com

By January 5th 2016

Pledge to the SAR

*We descendants of the heroes of
the American Revolution who, by their sacrifices,
established the United States of America,
reaffirm our faith in the principles
of liberty and our Constitutional Republic,
and solemnly pledge ourselves
to defend them against every foe.*

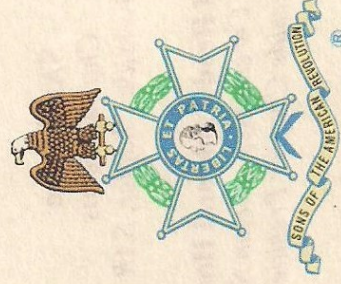


SAR Recessional

*Until we meet again, let us remember
our obligations to our forefathers,
who gave us our Constitution, the Bill of Rights,
an independent Supreme Court,
and a nation of free men.*

California Society, Sons of the American Revolution 140th Fall Board of Managers Meeting 1876 – 2015

Public Service Luncheon



Friday, November 6, 2015

Mission Inn Hotel
Riverside, California

EXHIBIT G

Program

Opening Ceremonies

Invocation

*Rev. Louis V. Carlson, Chaplain
California Society, SAR*

Pledge of Allegiance

*Mark Kramer
Riverside Chapter, SAR*

SAR Pledge

*Charles Gentis
Riverside Chapter, SAR*

Introduction of Head Table and Honored Guests

*Master of Ceremonies – Brian Stephens
Riverside Chapter President*

Greetings

*M. Kent Gregory, President
California Society, SAR*

Lunch

Presentation of Awards

Fire Safety Commendation Medal

*Firefighter Scott Huchtings
City of Riverside*

Law Enforcement Commendation Medal

*Officer Ian Crocker
Officer Strawberry Cruz
City of Riverside*

Silver Good Citizenship Medal

*Brennan Leininger
Flag For Every Hero*

Closing

SAR Recessional

*Henry Lucas
Riverside Chapter, SAR*

Benediction

*Rev. Louis V. Carlson, Chaplain
California Society, SAR*



**The California Society
of the
Sons of the American Revolution**



EXHIBIT H

Spirit of America Award Program
Report for the 2015 Fall Board of Managers

The General George S. Patton, Jr. Chapter presented awards at the graduation ceremonies for the four middle schools in the Camarillo Pleasant Valley School District and the Ventura County Christian School in Ventura. The Chapter awarded two bronze Good Citizenship medals and eight Outstanding Citizenship pins with certificates to ten deserving student graduates from these five schools. Chapter compatriots presented the awards and certificates at the schools' graduation ceremonies 9 June 2015 (Ventura County Christian School) and 10-11 June 2015 (Pleasant Valley School District).

Monte Vista Middle School (11 June – Compatriot Robert Colbern)

Girl: Naomi Igarashi (Outstanding Citizenship pin & certificate)

Boy: Drake Moody (Outstanding Citizenship pin & certificate)

Las Colinas Middle School (11 Jun – Compatriot William Hurley)

Girl: Brittany Lam (Outstanding Citizenship pin & certificate)

Boy: Conner Chatfield (Outstanding Citizenship pin & certificate)

Santa Rosa Technology Magnet (10 June – Compatriot William Hurley)

Girl: Antonia Marietti (Outstanding Citizenship pin & certificate)

Boy: Mitchell Burr (Bronze Good Citizenship medal & certificate)

Los Primeros School of Science and Art (11 June – Compatriot Robert Taylor)

Girl: Allison Martinez (Outstanding Citizenship pin & certificate)

Boy: Mark Pizza (Bronze Good Citizenship medal & certificate)

Ventura County Christian School (9 June – Compatriot Robert Taylor)

Girl: Isabella Margarita Gomez (Outstanding Citizenship pin & certificate)

Boy: Jason Lee Messner (Outstanding Citizenship pin & certificate)

Respectfully submitted

Robert L. Taylor

Spirit of America Award Program Chairman

CASSAR Best Chapter Contest Discussion Paper

EXHIBIT I

Observations

1. Thus far in 2015, 10 (38%) of the 26 chapters have submitted Best Chapter reports as shown in the attached Alternative A chart. Delta is the only Chapter in the Small category. There are five chapters participating in the medium small category and no chapters in the medium large category. Riverside is the only chapter participating in the large category, and there are three chapters participating in the very large category. During the eight years I have compiled the Best Chapter data, seven chapters have not participated in the contest (Yosemite, Butte, Central Coast, Santa Barbara, Monterey Bay, George Washington, and San Francisco). The Eagle, Redwood Empire, Redding, Coachella Valley, Gold Country, George Patton, and Sons of Liberty chapters have participated intermittently.
2. Three years ago the contest was changed from three categories to five categories in hopes that more chapters would participate. A downside to that change is that the number of chapters in the medium small, medium large, and large categories have fluctuated widely year to year. This seems to result primarily from the number of dropped members at the end of the year. A substantial number of members are reinstated in the first two to three months of the year. In 2013 and 2014 there were two categories with only one chapter submitting reports. In 2015, the small and large categories have only chapter submitting reports, and in the medium large category no chapters are submitting reports.
3. The Chapters are assigned to a size category based on the number of members in the chapter on December 31 of the preceding year. As shown in the first attachment, the distribution of chapters in the 2015 contest is as follows:

Category	# of Members	# of Chapters
Small	1-25	6
Medium Small	26-50	10
Medium Large	51-75	2
Large	76-100	2
Very Large	101+	6

Possible Changes to the Contest

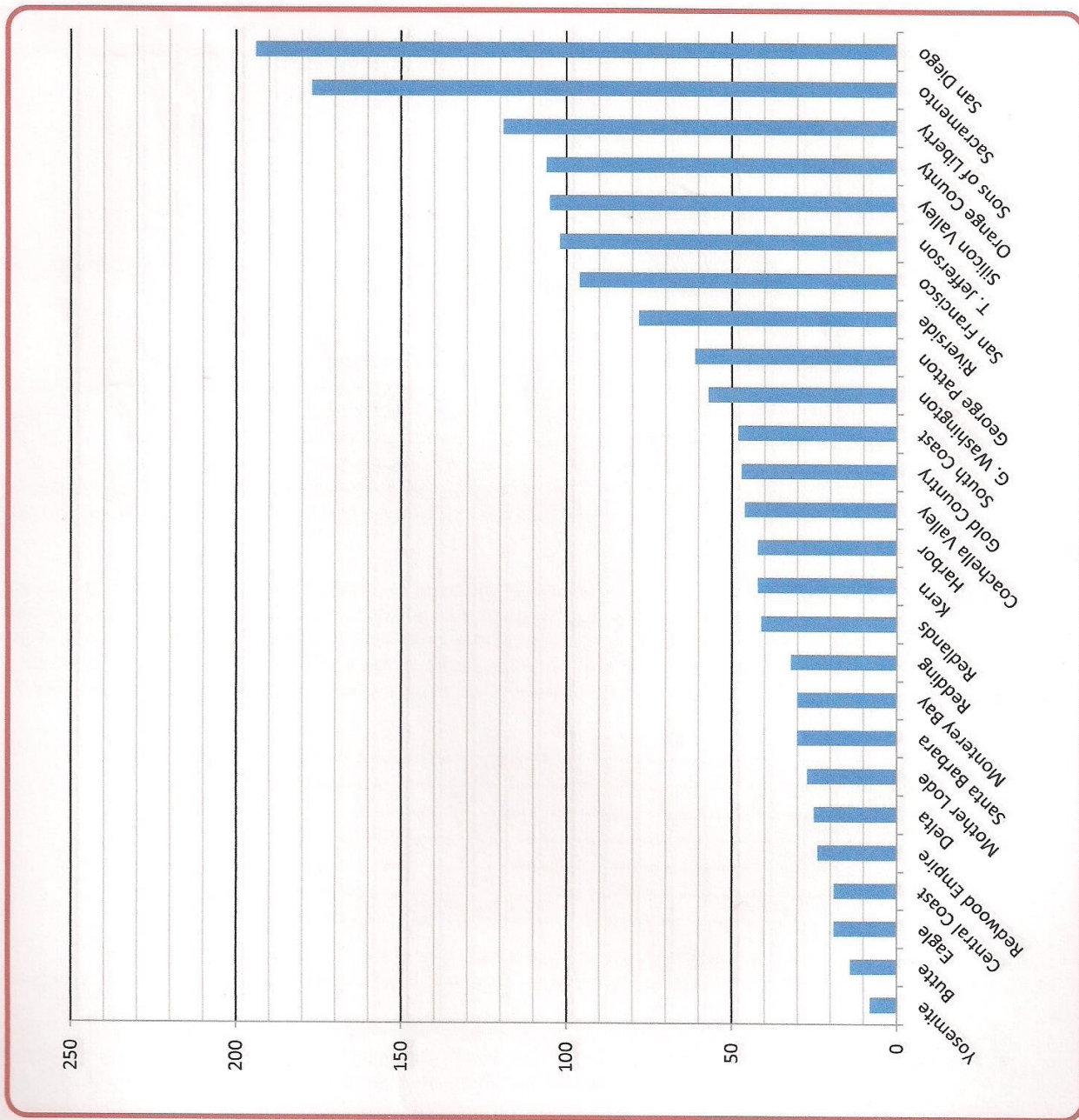
- A. Maintain the five size categories and assign chapters so that there are five chapters per chapter size category as shown in the attached Alternative B chart. When required, a chapter would be added to one or more categories. Given that there are now 26 chapters, four of the categories have five chapters and the large category would have six chapters. In 2016, if the same chapters submit reports as in 2015, this concept would result in no chapters competing in the small category and a minimum of two chapters in the remaining categories. This concept would not necessarily encourage non-participating chapters to participate.
- B. Change the date that chapter assignments to a size category are made from December 31 to February 28 so that the fluctuation in membership numbers resulting from non-payment of dues and reinstatements in the first 60 days of the years would be avoided. This would effectively change the contest year from January 1 – December 31 to March 1 – February 28. This change could more realistically reflect the chapter membership levels throughout the year. A downside to this change would be that the CASSAR Secretary would have to provide the contest proctor with the number of members in each chapter in the first two weeks of March so that the proctor could determine the winners for each of the nine awards presented in each category (e.g. a total of 45 awards).

Questions

1. Do members of the Executive Committee have other changes that might improve the contest?
2. Is the Best Chapter contest a useful method of encouraging chapters to promote the goals and values of SAR?
3. Are there other means by which CASSAR could more effectively recognize chapter activities?
4. What could be done to increase the number chapters participating in the contest?
5. Should Change A described above be implemented?
6. Should Change B described above be implemented?

CASSAR 2016 BEST CHAPTER CONTEST ALTERNATIVE A (same as 2015)

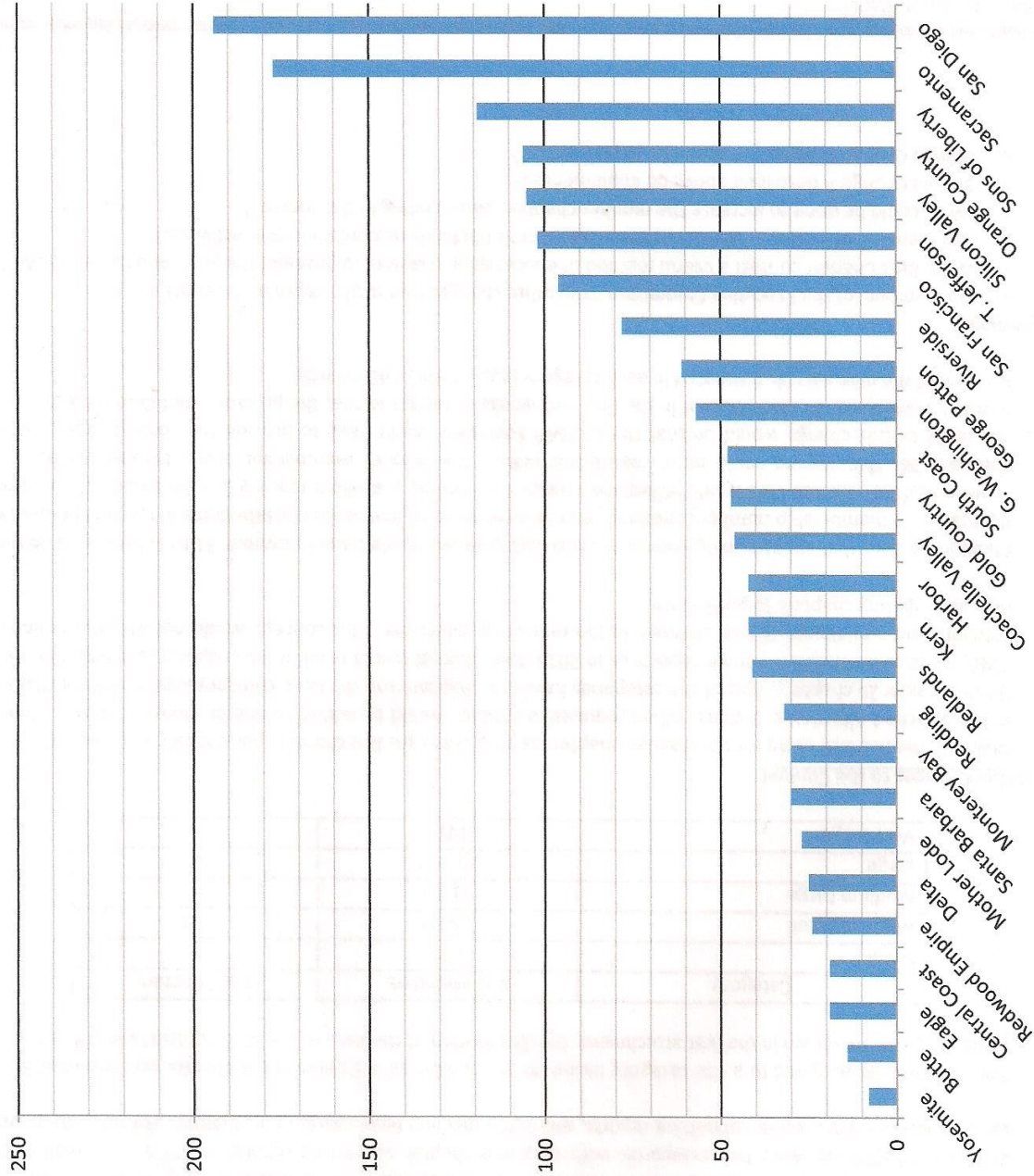
Group	CASSAR Chapters	Members as of 12/31/14
Small (1 - 25)	Yosemite	8
	Butte	14
	Eagle	19
	Central Coast	19
	Redwood Empire	24
	Delta	25
Medium Small (26 - 50)	Mother Lode	27
	Santa Barbara	30
	Monterey Bay	30
	Redding	32
	Redlands	41
	Kern	42
	Harbor	42
	Coachella Valley	46
	Gold Country	47
	South Coast	48
Medium Large (51 - 75)	G. Washington	57
	George Patton	61
Large (76 - 100)	Riverside	78
	San Francisco	96
Very Large (101 +)	T. Jefferson	102
	Silicon Valley	105
	Orange County	106
	Sons of Liberty	119
	Sacramento	177
	San Diego	194
	Total	1,589



Chapters in red participated in 2015

CASSAR 2016 BEST CHAPTER CONTEST ALTERNATIVE B

Group	CASSAR Chapters	Members as of 12/31/14
Small	Yosemite	8
	Butte	14
	Eagle	19
	Central Coast	19
	Redwood Empire	24
Medium Small	Delta	25
	Mother Lode	27
	Santa Barbara	30
	Monterey Bay	30
	Redding	32
Medium	Redlands	41
	Kern	42
	Harbor	42
	Coachella Valley	46
	Gold Country	47
Medium Large	South Coast	48
	G. Washington	57
	George Patton	61
	Riverside	78
	San Francisco	96
Large	T. Jefferson	102
	Silicon Valley	105
	Orange County	106
	Sons of Liberty	119
	Sacramento	177
	San Diego	194
	Total	1,589



Chapters in red participated in 2015

Spins of the American Revolution



11 November 2015 - The watermark behind the names is a picture of the WWII Memorial on the National Mall in Washington, D.C. The names here are living Western District veterans.

1. Seward Andrews, Jr.	164542-CA	17. William C. Hart	150306-CA	33. LeBron C. Preston	137953-CA
2. Thomas Barry	8599-CA	18. Philip G. Harvey	172317-CA	34. James L. Quinnelly	132941-CA
3. Rush Blodgett	115306-CA	19. Raymond A. Hasey	169328-CA	35. William B. Race	135336-CA
4. Allen Breed	161802-CA	20. William H. Henry, Jr.	164730-CA	36. Dale W. Ritter	164345-CA
5. Glen D. Brem	151248-CA	21. Frederick S. Hillhouse	121749-CA	37. Theodore M. Robinson	151057-CA
6. Edward C. Brockert, Jr.	140506-CA	22. Robert H. Hutchinson	85635-CA	38. Edward L. Rudisill	133714-CA
7. Giles T. Brown	67168-CA	23. Thomas L. Jarrard, Jr.	165714-CA	39. Welbourne D. Sanford	151374-CA
8. James L. Brown	148215-CA	24. James S. Jensen	154983-CA	40. James O. Schuyler	129086-CA
9. Raymond Burgess	125548-CA	25. Herman R. Kletzman, Jr.	93341-CA	41. William W. Siler	168437-CA
10. John E. Cahoon	152822-CA	26. Robert E. Krohemyer	70926-CA	42. Raymond E. Skinner	131299-CA
11. Watson Davis	124192-CA	27. Jack S. Laney	146478-CA	43. Roy S. Stanford	141324-CA
12. Frank E. Denison, Jr.	150011-CA	28. Ernest P. McCullough	156548-CA	44. William J. Taylor	118331-CA
13. Eugene H. Farrell	143392-CA	29. Carroll Moore	103759-CA	45. Russell L. Waters	167333-CA
14. Lafayette W. Grover	149332-CA	30. William F. Nicol	155913-CA	46. Robert L. Wilson	135034-CA
15. James E. Halbert	160615-CA	31. John W. Pefley	108950-CA	47. Ralph E. Winkler	125364-CA
16. Joseph E. Hallam	174818-CA	32. Lyle D. Phillips	158230-CA	48. Barlane R. Eichbaum	135514-NV

This certificate perpetuates the memory of the 855 members of the SAR World War II Veterans Corps. Shown here are 48 of the 81 initial Western District Compatriots who remain with us. Their service is etched permanently in our hearts and in granite at the entrance to our nation's World War II Memorial: "...we honor those twentieth century Americans who took up the struggle during the Second World War and made the sacrifices to perpetuate the gift our forefathers entrusted to us—a nation conceived in liberty and justice."

Thomas E. Lawrence
Thomas E. Lawrence, President General

EXHIBIT J

EXHIBIT K

JOHN MICHAEL "Mike" TOMME, SR.

Candidate for the Office of

President General 2016-2017

Endorsed by GASSAR, VASSAR

Endorsed by: AMS District, So. Central District

Endorsed by numerous individuals

George Washington Fellow

Financial Supporter of the CAAH

National Service (NSSAR)

Secretary General, 2015-2016

Treasurer General, 2014-2015

Registrar General, 2012-2014

Geo. Washington Endowment Fund Bd. 2009-2013

Vice Chairman of GWEF Bd., 2012-2013

Alternate National Trustee, 2012-2013

National Trustee, 2011-2012

Color Guard Comm., Commander, 2011-2013

Color Guard Comm., Vice-Commander, 2009-2011

Color Guard Adjutant, 2007-2009

Finance Committee, 2011-2016 (voting member)

Retention/Reinstatement Committee

Americanism Committee, Chairman 3 years

Medals and Awards Committee

Membership Committee

Minute Man Committee

Council of State Presidents

CAAH Advisory Task Force

Veterans Committee

CAR Committee

Congress Planning Committee

First Line Signers-32

Attended last 25 Trustee/Leadership Meetings

Attended last 9 National Congresses

Experience

State Recording Secretary & Chapter Secretary for Two Terms.

34 year career with the State of Georgia, Risk Mgt. Department. Served as Treasurer for (RIMS) Risk Insurance & Management Society

State Service (GASSAR)

President, 2010-2011, Sr. Vice President, Registrar, Recording Secretary

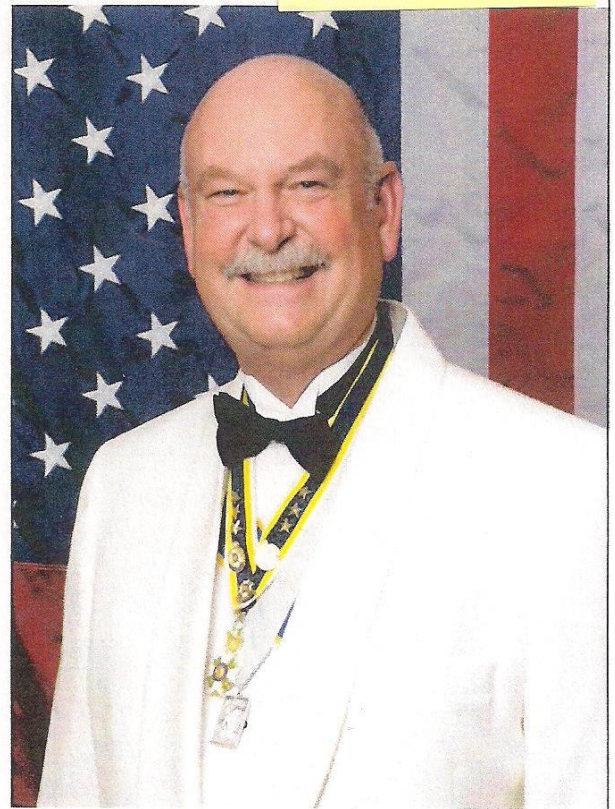
Congress Planning Committee, 2009, Vice-Chair

Chairman of Patriot Medal Committee

Chairman of Membership Committee

Chapter Service (GASSAR)

Chapter President (Two terms), Vice President, Secretary (Two terms), Charter Member-Marquis de Lafayette Chapter, GA



SAR Medals & Certificates:

Minute Man Class 2013

Patriot Medal

State Medal of Distinguished Service

Meritorious Service Medal-National (2), District, State & Chapter Level

Gold & Silver Roger Sherman Medal

Silver Good Citizenship Medal

Silver & Bronze C.A.R Medal

Liberty Medal & Oak Leaf Cluster

Bronze Good Citizenship Medal

Service to Veterans Medal & Oak Leaf Cluster

Gold, Silver & Bronze Color Guard Medals

Silver & Bronze Samuel Adams Congress Medals

Silver Council of State Presidents Medal

Chapter Medal of Distinguished Service

Dual SAR memberships

Col. Fielding Lewis & George Washington Chapters (VA), Old North State Chapter (NC), West Virginia Society, Delaware Society, Kansas Society, Norman Chapter (OK), Ohio Society, Athens Chapter (GA) Plano Chapter (TX), Mother Lode & Orange Co. Chapters (CA)

Personal

Married to Cilla Leed

Three children; son is a member of the SAR, 5 grandchildren

Warren M. Alter
Candidate for
TREASURER GENERAL
2016-2017

National Society Service

Appointed Inspector General 2012, 2013, 2014, 2015

Elected Vice President General Rocky Mt District 2013

Elected to GWEF Board Twice – Each Four Year Terms

- 2007-2011 Secretary all 4 years, Vice Chair 1 year
- 2012-2016 Secretary all 4 years, Vice Chair 1 year

Elected National Trustee AZ 2007, 2011, 2012

Elected National Alternate Trustee AZ 2008, 2009, 2010

National Committee Chairman:

Council of VPG 2013; Public Service 2006-09, 2012, 2013

National Committee Vice Chairman:

GWEF Board 2010, 2015; Public Service 2005, 2015;

Magazine Committee 2010-2014

National Committee Member:

Anniversary of the 250th American Rev War 2012-Present,

Congress Planning Committee 2012, Council of State Presidents

2004-2007, Eagle Scout Committee 2005-2010, Public Service

Committee 2004-Present, Magazine Committee 2009-Present,

GWEF Fund Raising 2008-Present, Library and Archives 2014-Present, History Committee 2014-Present.

SAR Supporter:

NSSAR Life Member, George Washington Fellow, CAAH-SAR Foundation Lamplighter Award, SAR 1776 Society, Eagle Scout Fund (3 Palms), JROTC Fund, Rumbaugh Orations Fund, Knight Essay Fund, Friends of Library-Ben Franklin Subscriber.

National Congresses Attended: 11 (2005-2015)

National Leadership Meetings Attended: 24 (2004-Present)

Society and Chapter Service

Arizona Society: Current State Secretary since 2007.

President 2005, Vice President 2004, Secretary/Treasurer 2007-

2015. **Committee Chairman:** Eagle Scout, CAAH, Bylaws and Constitution, Medals and Awards. Vice Chair 2012 AZ Congress Planning Committee.

Tucson Chapter: Current Registrar/Genealogist.

President 2003, Vice President, and Chaplain. **Committee**

Chairman: Public Service, Bylaws/Constitution, Medals/Awards

Dual Member: Germany Society, International Society, Spain Society, FL SAR, PA SAR, TX SAR

SAR Awards

Minuteman (Class of 2014)

Patriot Medal

Distinguished Service Medals (State and Chapter)

Meritorious Service Medals (National, State, and Chapter)

Roger Sherman Medals (Gold, Silver, and Bronze)

Silver Samuel Adams Congress Medal

Silver Good Citizenship Medal

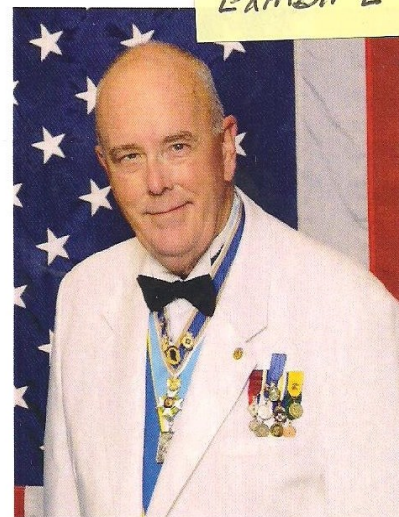
Silver Council of State Presidents Medal

Liberty Medal (w/8 oak leaf clusters – 96 new members)

Law Enforcement Commendation Medal

Personal

Married – Nancy Alter, President AZ Ladies Auxiliary 7 years. Daughters Katie Alter and Amanda (Arndt). Son-in-law Richard and grandson Brayden are both SAR Members. All are GWEF Fellows.



Education and Training

University of Arizona, B.S. Public Administration

University of Phoenix, M.A. Organizational Management

Northern Arizona University, M.Ed. Educational Leadership

Arizona State University, Certified Public Manager

Graduate FBI National Academy and Certified Peace Officer AZ

Professional Experience

Law Enforcement Executive. Retired as Bureau Chief Pima County Sheriff's Department after 39 years. At various times in my career, was responsible for \$110 million department budget with its 1500+ employees. Also operated and managed a 2,200 inmate Correctional Facility as Corrections Director. Obtained and managed numerous Federal and State Grants. Taught law enforcement classes at department and state academies. University/College Adjunct Faculty, 14 years, taught undergraduate level courses in criminal justice, corrections, and ethics; graduate level courses in corrections.

Community Activities

Criminal Justice:

Chairman, AZ High Intensity Drug Trafficking Area (AZHIDTA) Executive Committee. Oversaw its Federal Budget. Chairman, Counter Narcotics Alliance Board of Directors.

Responsible for overseeing its budget.

Member, AZ Criminal Justice Coordinating Council

Non-Profit Boards/Leadership Service:

Board Member and President, Pima Youth Partnership

Board Member and Vice President, Brewster Domestic Violence

Board Member, Crime Prevention League

Board Member, Sheriff's Auxiliary Volunteers

Member, Green Valley Rotary Club

Member and advisor numerous Masonic Organizations including

DeMolay, Rainbow, Masonic Blue Lodge, York Rite, Shrine

Community Awards:

2014 Kentucky Colonel

2005 Greater Tucson Leadership Community Leadership Award

Endorsements

Districts: Atlantic Middle States Association, Central District, Great Lakes District, and South Atlantic District. State Societies: AL, AZ, CO, FL, GA, IN, MI, MO, NC, NM, OH, OK, TN, TX, and VA. And numerous chapter and individual endorsements.

**Please send endorsements to: PG Lindsey C. Brock
at lindsey.brock@comcast.net or 6532 Heckscher
Dr. Jacksonville, FL 32226-3226.**

Russell F. DeVenney, Jr.*Candidate for***Registrar General****2016 – 2017****National Service - NSSAR**

Registrar General (2015 – 2016)
 Recording Secretary for the Trustee, Executive and Foundation meetings (2013 – 2015)
 National Trustee (2009 – 2010)
 Alternate Trustee (2008 – 2009)
 Life Member (2005)
 George Washington Fellow (2004)
 Contributor to the CAAH
 Contributor to Eagle Scout Scholarship (Silver Palm)
 Contributor to Rumbaugh Orations Scholarship (Patron)
 Contributor to the Friends of the SAR Library
 President General's Advisory Committee (2009)
 250th Celebration Committee (2009 – present)
 National Color Guard (Adjutant 2013 – present)
 Color Guard on SAR trips to France (2008),
 Spain (2010) and Germany (2012)
 C.A.R. Liaison Committee (8 years – VC 5 years)
 DAR Liaison Committee (6 years – VC 5 years)
 Veterans Committee (8 years – VC 4 years)
 (SAR VAVS Rep – 9 years)
 Congress Planning Committee (4 years – VC 2 yrs)
 Ladies Auxiliary Liaison Comm. (2 years – C 1 yr)
 George Washington Dist Committee (2 years)
 ROTC/JROTC Liaison Committee (2 years)
 Merchandise Committee (2 years)
 Council of State Presidents (3 years)
 Eagle Scout Committee (5 years)
 First Line Signer of 40+ applications.
 National Congress Attendance (10)
 National Leadership Meetings (19)
 South Central District Meetings (10)

State Service – Missouri Society

Honorary Vice President (2009 – present)
 President (2008 – 2009)
 Life Member (2005)
 Past Central Missouri Color Guard Commander
 Chairman of the 2010 Annual Convention
 Chairman of a number of Committees

Dual Memberships

MDSSAR (2005) Germany Society (2007)
 OHSSAR (2005) Spain Society (2010) (Charter Mem)
 WVSSAR (2006)
 TXSSAR (2014)

**Endorsements**

South Central District	South Atlantic District
Central District	Great Lakes District
Ohio Society	Alabama Society
Texas Society	Missouri Society
Oklahoma Society	

Personal

Married to Laura Hunter DeVenney (DAR)
 NSSAR 2nd Vice President Ladies Auxiliary
 2 Sons – SAR members & Color Guard
 2 Daughters – DAR members
 12 grandsons – C.A.R. & Color Guard
 3 granddaughters – C.A.R.
 (4 serve as M.S.S.C.A.R. Officers)

Education & Career

B.S. in Business Adm. minor in Accounting
 Office Manager & CEO for nearly 40 years
 of a Mechanical Contracting Company

Other Organizations

Organizing President of the War of 1812 in
 the State of Missouri (2008 – 2013)
 State Treasurer (2013 – 2016)
 General Society of the War of 1812
 Treasurer General (2014 – 2017)
 Ohio Valley Central DDPG (2011 – 2013)
 A.F. & A.M. of the State of Missouri
 SMOTJ – Priory of St. Louis the Crusader

Please send endorsements to: **PG Lindsey C. Brock**
6532 Heckscher Dr., Jacksonville, FL 32226-3226
 or: lindsey.brock@comcast.net

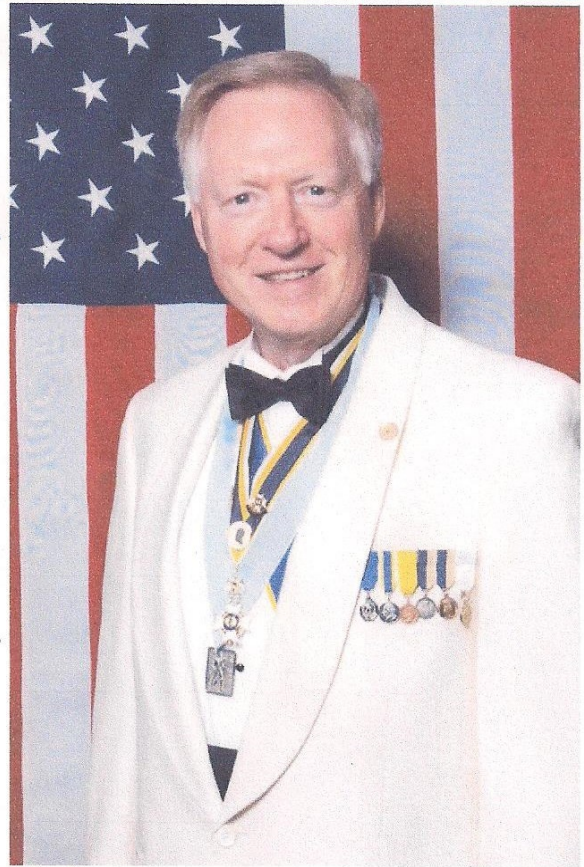
Larry Guzy Treasurer General 2015-2016 Candidate For Secretary General 2016-2017

**Continuously active at National since 1999.
I know our organization**

**In 1985 established a Corporation where I
served as the CEO and CFO for 28 years
I know and understand record keeping**

**As National Congress Planner for five years,
Registrar General, and now Treasurer General,
I know the various parts of our SAR**

- Life Member since 1998, member since 1995
- Active member at National from 1999
- GW Fellow from 1999, GW Board member 2013-2017
- Member of the Founders Circle
- Contributed over \$15,000 to the Center Campaign and now committed to Gold Quill
- Contributed \$2,000 to the Library Fund
- Germany Society Sec & Treas. 2014 to 2016
- National Congress Planner 2007-2011
- First Line Signer of over 145 members
- National Membership Chairman 2003-6
- Minute Man Class of 2006
- Chairman Council of Vice Presidents General as VPG South Atlantic District 2003
- Sec/Treas. Council of State Presidents 2005-7
- Color Guardsman from 1998
- Georgia Society President 2000, Trustee 2001
- Piedmont Chapter President 1998, and founding President of the John Collins Chapter 2000



- Awarded 56 Certificates of Appreciation
- Holder of 6 National Gold medals
- **BS Mathematics 1970**
- Naval Officer 1970-1973 (Lt USNR)
- **Eagle Scout in 1961**
- CEO & CFO of for profit Corp for 28 yrs

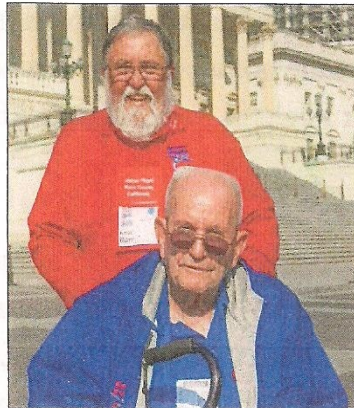
As Secretary General, will support the programs of the Society, and use my knowledge of the SAR to work toward changes that will enhance our Society for the future. We need to engage not only our current membership, but also to seek ways to appeal to the next generations

Endorsements: Atlantic Middle States, South Central District, GA, and various Compatriots

Send endorsements to: PG Lindsey C. Brock, 6532 Heckscher Dr., Jacksonville FL 32226-3226, or email lindsey.brock@comcast.net.

EXHIBIT 0

Honor Flight



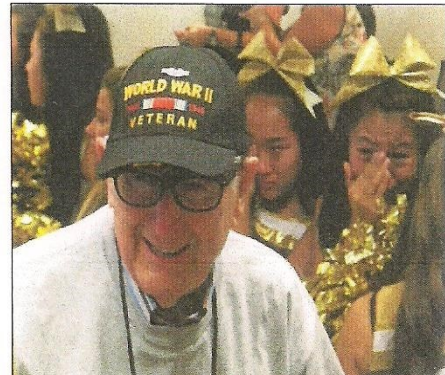
Korean War Veteran Buck Turner and Honor Flight Guardian Arnie Burr in Washington, DC. Compatriot Burr is the President of the California Society, SAR Kern County Chapter

Honor Flight is a non-profit nationwide network which consists of over 130 independent "hubs" across America. Honor Flight escorts veterans to Washington D.C. to see their memorials using monies donated by individuals, foundations, associations, business owners and corporations who wish to recognize their contributions and thank them for their service and sacrifice to the United States and its citizens.

The next flights are planned for the spring of 2016 – but they have not been scheduled as of this time.



Un Hui Yi, Gail and Ray Raser talk with WW II Veteran Bob Shaw



West Torrance High School cheer leaders can't control their emotions after greeting a WW II Army combat veteran

For additional information about Honor Flight see their webpage at:

<http://www.honorflight.org/>

Compatriots Jim Fosdyck, his wife Un Hui Yi, Compatriot Ray Raser and his wife Gail Raser participated in a welcome home greeting of ninety-one World War II and Korean War Veterans by Honor Flight in San Diego, California, Sunday, October 4, 2015.

Sunday, October 25, 2015 Compatriots Jim Fosdyck, his wife Un Hui, Compatriot Dan Henry and his wife Annette Henry along with Compatriot Matt Noell (Orange County Chapter) and Col. David Smith (Sons of Liberty Chapter) participated in an Honor Flight where more than sixty World War II and Korean War Veterans were welcomed home at Los Angeles International Airport.

EXHIBIT P

Daniel J. Henry
18421 Lemon Dr. Apt 214
Yorba Linda, CA 92886
(714)404-3227
H3rdmdregt@aol.com

CASSAR President Dr. Kent Gregory,

Dear President Gregory and the California State Society Board of Directors. As the California Society, SAR Veterans Programs Chairman, It is my honor to recommend to the California Society Board of Directors and the general membership that the California Society take the lead and recommend a resolution to make Honor Flight a National SAR recognized event and encourage each chapter within a reasonable distance to an airport that Honor Flight is either flying out of but even more exciting returning with their precious cargo of WWII, Korean War or Vietnam War veterans after their trip to see their own War & Veteran's Memorials in Washington D.C.

I have had the privilege to witness and speak with a number of Honor Flight veterans while in Washington D.C. a few weeks ago and also to participate in the return celebration of a recent Honor Flight at Los Angeles International Airport. Our society has a number of members such as myself, Jim & Un Hui Fosdyck (LAUX), Matt Noell from the Orange County Chapter, Col. David Smith USAF (Ret) of the Sons of Liberty Chapter, Ray and Gail Raser (LAUX) from the San Diego Chapter and Arnie Burr from the Kern Chapter to name a few and I know there are others who have been involved both as volunteers and as guardians for each of these trips. It is my earnest desire to support and to see this program recognized with our vocal and physical support to honor our veterans in this wonderful program.

It is also reassuring that our National President General Tom Lawrence and his wife Mickey Jo are both supporters of the Honor Flight program. I have asked Jim Fosdyck to speak on my behalf and would welcome others who have firsthand experience with Honor Flight to speak of their experience and to encourage our societies support for this endeavor.

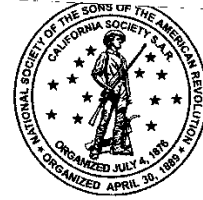
Sincerely,
Daniel J. Henry
California Society, SAR Veterans Programs Chairman

EXHIBIT Q

	A	B	C	D	E	F	G	H
1	2015 Budget							
2	California Society, Sons of the American Revolution							
3								
4			2016	2016	2016	ACTUAL		
5		FY2015	OPERATING	PASS THROUGH		SPENT		
6		<u>Budget</u>	<u>FUNDS</u>	<u>FUNDS</u>	<u>TOTAL</u>	<u>TO SEPT.</u>		
7	RECEIPTS							
8	I-01A · Annual CASSAR Dues Received	23360	23,620		23,620		1,181	23,620
9	I-01B · Annual NSSAR Dues Received	41550		41,335	41,335		1,181	41,335
10	I-03 · LM Annual CASSAR Dues(from Inv acct)	6360	6,180		6,180		309	6,180
11	I-03 · LM Annual NSSAR Dues(from Inv acct)	9300	-	10,710	10,710		306	10,710
12	I-04 · LM Dues for Chapters	3180	-	3,090	3,090		309	3,090
13	I-05 · New Member CASSAR Dues	5200	4,000		4,000			
14	I-06 · Supplemental App State Fee	900	700		700			
15	I-08 · Bank Account Interest	2	2		2			
16	I-09 · Reinstated Member Fee	720	740		740			
17	I-14 · Interest Income-San Diego Fund	1250	-	1,250	1,250			
18	I-16 · LM Accounts Receivable	2500	-	2,500	2,500			
19	I-17 · Income from Other Sources		-	-	-			
20	I-18 TRNSF FM EDUCATION FND	1500	1,250		1,250			
21	I-21 · Income from Medals & Certs		-		-			
22	I-25 · Donations		-		-			
23	I-26 Compatriot Subscription Fees	105	105		105			
24	Total Receipts	\$ 95,927	36,597	58,885	\$ 95,482			
25								
26	EXPENSES							
27	Executive Committee Expenses							
28	A-01 · President Expenses	500	500		500	183		
29	A-02 · Executive VP Expenses	300	300		300			
30	A-03 · VP_North Expenses	100	100		100			
31	A-04 · VP_South Expenses	100	100		100			
32	A-05 · VP-Membership Expenses	1000	1,000		1,000	189		
33	A-06 · Executive Secretary Expenses	1600	1,600		1,600	955		
34	A-07 · Treasurer Expenses	300	300		300			
35	A-08 · Registrar Expenses	600	700		700	528		
36	A-09 · Genealogist Expenses	100	100		100			
37	A-11 · Chancellor Expenses	100	100		100			
38	A-12 · Historian Expenses	100	100		100			
39	A-14 · Chaplain	100	100		100			
40	Total Exec. Cmte Expenses	\$ 4,900	5,000	-	\$ 5,000			
41								
42	Committee Expenses							
43	B-21 · Awards & Medals Com Exp	1300	1,300		1,300	795		
44	B-22 · Best Chapter Contest Exp	650	650		650	314		
45	B-24 · New Chapter Assistance Exp	250	250		250			
46	B-27 · Poster Contest Expenses	850	900		900	882		
47	B-29 · Brochure Contest	950	1,000		1,000	933		
48	B-30 · Oration Contest	1770	1,770		1,770	1,700		
49	B-33 · JROTC Committee Exp	1770	1,770		1,770	1,501		
50	B-34 · CAR Expenses	1000	1,000		1,000	576		
51	B-35 · Eagle Scout Contest Exp	1770	1,770		1,770	1,233		
52	B-39 · Essay Contest Expenses	1770	1,770		1,770	1,174		

	A	B	C	D	E	F	G	H
53	B-41 - Spring Meeting Allowance	300	300		300	300		
54	B-42 - Fall Meeting Allowance	300	300		300	300		
55	B-43 - Visitin PG Expenses	1900	1,900		1,900	652		
56	B-44 Sea Cadets	300	300		300			
57	B-60 - Valley Forge Contest Exp	3800	3,800		3,800	3,800		
58	Total Committee Expenses	\$ 18,680	18,780		\$ 18,780			
59								
60	Program Expenses							
61	C-45 - California Compatriot Exp	1100	1,100		1,100	692		
62	C-49 - CASSAR Flag Expenses	400	400		400	260		
63	C-50 - Congress Hospitality Suite	750	750		750	750		
64	Total Program Expenses	\$ 2,250	2,250	-	\$ 2,250			
65								
66	Operating Expenses							
67	E-01 - Annual Dues to NSSAR	50850	-	52,045	52,045	44,360	1,487	52,045
68	E-02 - LM Dues to Chapters	3180	-	3,090	3,090	2,740	309	3,090
69	E-03 - Filing Fees	55	55		55			
70	E-10 - Liability Insurance Expenses	890	550		550			
71	E-11 D & O Insurance	1400	1,000		1,000			
72	E-30 - Storage Rent & Supplies	550	600		600	552		
73	E-40 - Other CASSAR Expenses	2000	2,000		2,000			
74	E-55 - The SAR Foundation(E-55)	1000	1,000		1,000	1000		
75	E-70 - Richard F. Locke Award	1250	1,250		1,250			
76	T-10 State & Federal Taxes	25	25		25			
77	Total Operating Expenses	\$ 61,200	6,480	55,135	\$ 61,615			
78								
79	Total Expenses	\$ 87,030	32,510	55,135	87,645			
80								
81	E-51 - Transfers to Invest Accounts							
82	Congress Fund	2000	2,000	-	2,000			
83	SD Education Fund	1250	-	1,250	1,250			
84	Education fund							
85	Life Member Fund - New members	2500	-	2,500	2,500			
86	Total	\$ 5,750	2,000	3,750	\$ 5,750			
87								
88	Net Surplus/(Deficit)	\$ 2,532	2,087	-	\$ 2,087			
89								
90	2015 Budget Approved Nov. 7, 2014 at FBOM in Petaluma							
91	2016 Budget assumptions							
92	I-01A based on current 1882 members, minus 192 new members, minus 309 life members-minus 200 drops = 1181							
93	I-01B based on current 1882 members, minus 192 new members, minus 309 life members, minus 200 drops = 1181							
94	I-03 & E-02 There are 306 Regular Members (N,S,C), 3 Dual Members (S,C), and 3 Emeritus Members (\$0)							
95	I-05 based on est. 200 new members							
96	I-06 based on 70 supplementals. 67 in 2015.							
97	I-09 based on 47 reinstated members							
98	E-01 based on I-01B+I-03=1,487							
99								
100								
101	Respectfully submitted, Executive Vice President, CASSAR							
102	Ron Barker							
103	Executive Vice President							
104	CASSAR							

EXHIBIT R



**California Society,
Sons of the American Revolution**

***A Resolution in Support of the Outreach Education Center and Museum
in Accord with the Solid Light Vision Plan***

Whereas one of the patriotic goals of the Sons of the American Revolution is to maintain and extend the institutions of American freedom by promoting increased history and civics education;

Whereas Louisville's total population is over 1 million, and its Main Street has been listed by Forbes as one of the top 15 emerging downtown areas;

Whereas Louisville has over 12 million visitors and 2.8 million visitors to Museum Row each year, with six significant museum or tourist venues, and five additional museums currently in the planning stages or under construction on Main Street;

Whereas the Outreach Education Center project has been funded almost entirely by private donations from members, foundations, and individuals without resorting to National Society, SAR general funds originating from dues or the line of credit and will continue to be so funded;

Whereas the previous capital campaigns have met with success, raising approximately 20 million dollars for the purchase and construction of the National Society, SAR's offices and genealogical library and the initial Solid Light planning of the Center;

Whereas the Outreach Education Center and Museum are anticipated to generate revenue for the National Society, SAR, as projected in the business plan created by the University of Louisville, which revenue can be used for programs to better serve our membership and the community at large;

Whereas the Outreach Education Center and Museum will increase the visibility of the National Society, SAR, regionally, nationally, and internationally, by making its resources available to all via the internet;

Whereas Solid Light's experience with similar projects makes it uniquely suited to work as a partner to create a museum of ideas and experiences which will honor the service of our Patriot ancestors, tell their stories, inspire citizens, and demonstrate the relevance of the Patriot's sacrifices and the importance of Liberty in the present day;

Therefore, be it resolved that the California Society, Sons of the American Revolution, continues to support the National Society, SAR Outreach Education Center and Museum in accord with the Solid Light Vision Plan, requests its trustees and delegates to support continuing the project, and encourages other state societies and compatriots to do likewise.

Approved on November 6, 2015 by the Board of Managers of the California Society, Sons of the American Revolution.

Dr. M. Kent Gregory, President

Douglas Bergtholdt, Secretary

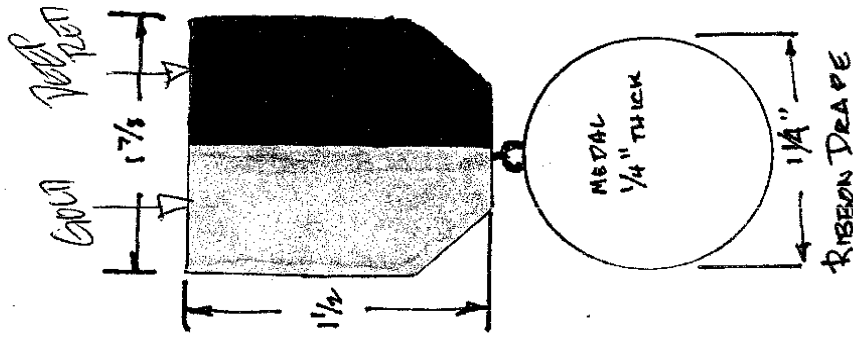
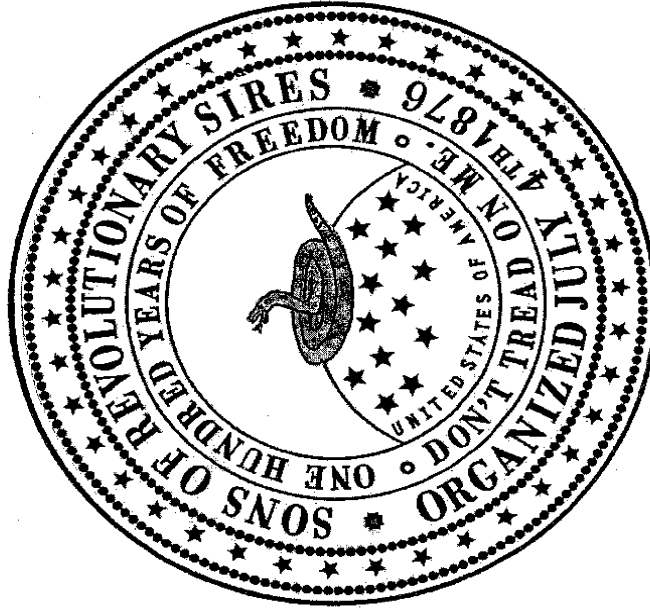
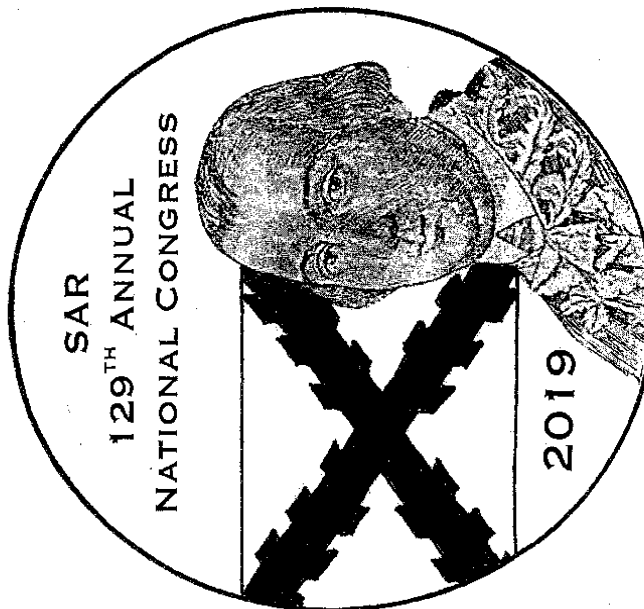


EXHIBIT S



REVERSE



OBVERSE

Pledge to the SAR

*We, descendants of the heroes of the American Revolution who,
by their sacrifices, established the United States of America,
reaffirm our faith in the principles of liberty and our
Constitutional Republic, and solemnly pledge ourselves
to defend them against every foe.*

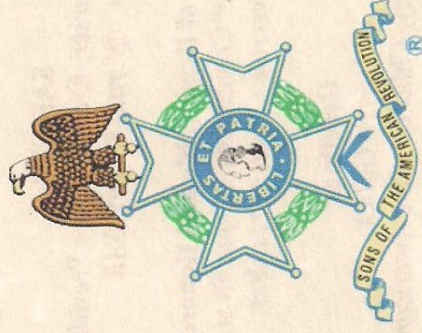


SAR Recessional

*Until we meet again, let us remember our obligations
to our forefathers who gave us our Constitution,
the Bill of Rights, an independent Supreme Court,
and a nation of free men.*

California Society, Sons of the American Revolution 140th Fall Board of Managers Meeting 1876 – 2015

Chapter Awards Luncheon



Saturday, November 7, 2015

Mission Inn Hotel
Riverside, California

EXHIBIT T

Program

Opening Ceremonies

Invocation

*Rev. Louis V. Carlson, Chaplain
California Society, SAR*

Pledge of Allegiance

*J. Michael Tomme, Secretary General
National Society, SAR*

SAR Pledge

*Ron Barker, Executive Vice President
California Society, SAR*

Introduction of Head Table and Honored Guests

*Master of Ceremonies – Brian Stephens
Riverside Chapter President*

Greetings

*Darren Gillick
California Society, Children of the American Revolution*

Lunch

Valley Forge Scholarship Program
Robert Taylor, Program Chairman

*Jenny Stocks, Newcastle Elementary School
Newcastle, California*

*Nicole Jacobson, John Adams Academy
Roseville, California*

Presentation of Awards

*M. Kent Gregory, California Society, SAR President
James C. Fodsyck, Color Guard Commander*

Closing

SAR Recessional

*Larry Magerkurth, former President General
National Society, SAR*

Benediction

*Rev. Louis V. Carlson, Chaplain
California Society, SAR*

Any CASSAR member who will have contact with youth in conjunction with Chapter, State, or national youth programs shall first complete the ~~BS~~ youth safety program sponsored by the Boy Scouts of America, or the equivalent

Move that the Chapter registrars be tasked with checking the Megan's law database for all new applicants and provide written confirmation to the State Registrar of the results, If ~~a~~ confirmation not provided or if application prepared by the State Registrar, the State Registrar shall check the Megan's law database ~~for~~ concerning the application prior to forwarding the application. If an applicant's name appears on the Megan's law database, the registrar shall not forward the application but shall bring the matter to the attention of the State President for resolution.

*California Society,
Sons of the American Revolution*

140th Fall Board of Managers Meeting
1876 – 2015

Gala Banquet



EXHIBIT W

Saturday, November 7, 2015

Mission Inn Hotel
Riverside, California

Pledge to the SAR

*We descendants of the heroes of the American Revolution who,
by their sacrifices, established the United States of America,
reaffirm our faith in the principles of liberty and our
Constitutional Republic, and solemnly pledge ourselves
to defend them against every foe.*



SAR Recessional

*Until we meet again, let us remember our obligations
to our forefathers, who gave us our Constitution,
the Bill of Rights, an independent Supreme Court,
and a nation of free men.*

Program

Opening Ceremonies

Invocation

*Rev. Louis V. Carlson, Chaplain
California Society, SAR*

Presentation of the Colors

*California Society, SAR Color Guard
James C. Fosdyck, Commander*

National Anthem

James Blauer, California Society, SAR Historian

Pledge of Allegiance

*Lindsey Brock, former President General
National Society, SAR*

SAR Pledge

*John. L. Dodd, Vice President General-Western District
National Society, SAR*

Introduction of Head Table and Honored Guests

*Master of Ceremonies – Rev. Louis V. Carlson
California Society, SAR former President*

Dinner

Ladies Auxiliary Raffle
Lisa Gregory, Ladies Auxiliary President

Presentation

“Spain: Our Forgotten Ally in the American Revolution”

*Edward F. Butler, former President General
National Society, SAR*

Presentation of Awards

*M. Kent Gregory, President
California Society, SAR*

Closing

SAR Recessional

*Philip Hinshaw, Vice President-Membership
California Society, SAR*

Benediction

*Rev. Louis V. Carlson, Chaplain
California Society, SAR*

Retirement of the Colors

*CASSAR Color Guard
James Fosdyck, Commander*

PG Butler Pens Award-Winning Book

On May 10, 2010, then-President General Judge Ed Butler, during a private audience with then-Crown Prince Felipe de Borbon of Spain, was asked by the Prince to write a book about Spain's involvement during the American Revolution. The royal audience was part of a three-week tour of Spain, organized and led by Butler for members the NSSAR and their wives.

Since serving as president of the Mexico Society of the SAR in 2001, Butler had been interested in helping Hispanics prove their descent from American Revolutionary War heroes. He descends from King Ferdinand and Queen Isabella of Spain. It was because he had published several articles about Spain helping the U.S. during the Revolutionary War in the National Genealogy Society's *News magazine* and *The SAR Magazine* that he had received letters of appreciation from Prince Felipe and his father, King Juan Carlos.

On the day of the audience, King Juan Carlos was in the hospital recovering from lung surgery, and Prince Felipe was the "acting king." Last year, Juan Carlos abdicated in favor of Felipe, who now serves as King of Spain. During that interview, King Felipe also asked Butler to write a screenplay and wanted him to get Hollywood to make a movie, "and I want Antonio Banderas to play the part of [Bernardo] Galvez," he said. Butler also has written the "swashbuckling" screenplay and contacted Banderas' agent, who declined until "the money for the production is in place."

For Hispanic family historians, the book is a treasure trove. It contains 360 pages with 214 footnotes, 22 pages of reference materials, and 38 pages of appendices, rich with the names of Spanish Patriots who may be the ancestors of

local Hispanics. These appendices include names of soldiers, citizens who donated pesos at the request of the king, and a list of Havana, Cuba, merchants who loaned money to France so it could pay its soldiers fighting in Virginia. This book gives a blow-by-blow description of how Spain systematically removed England as a threat for a second front from either the west or the south.

Interested Hispanics may find they are eligible for membership in the SAR and DAR, and Butler is attempting to recruit as many as can document their family trees.

For historians, the book discusses many heretofore unknown battles involving Spanish soldiers and Spanish Militia who fought the British at Fort San Carlos in present-day St. Louis, and who attacked Fort St. Joseph and seized its large stockpile of weapons and food, ending a planned British sweep down the Mississippi River Valley to destroy Spanish and American outposts.

The Texas Connection with the American Revolution (TCARA) has given Butler an award for the "Best American Revolutionary War History Book in 2014." The book documents participation in the American Revolutionary War by hundreds of Spaniards, all of whom have descendants living and working in the Southwest and Gulf of Mexico areas of the United States. Hispanic children must no longer feel estranged from society, as the probabilities are that one of their ancestors helped the U.S. achieve its independence.

Butler is seeking speaking dates for other organizations. He can be reached at SARPG0910@aol.com. For additional information, visit www.galvezbook.com. For more information about Butler, visit judge-ed-butler.sarsat.org.

The book can be ordered for \$29 plus \$6.50 for postage and handling. There is also a digital CD that will allow readers to scan the book for the names of possible ancestors. The CD costs \$15, but when ordered with the book, it is \$10. Mail orders to: Southwest Historical Press, PO Box 170, 24165 IH-10 West Suite 217-170, San Antonio, TX 78257.

THE PATRIOT MEDAL

The Patriot Medal is issued only by a state society. It is the highest award given for service at the state or chapter level. This medal is presented only once. It represents long, faithful and outstanding service at the state or chapter level.

THE DISTINGUISHED SERVICE MEDAL

The State Medal of Distinguished Service, authorized in 1998, is the highest medal that can be awarded by a state society president. A state president may present only one Medal of Distinguished Service during each year of his tenure as state society president. The medal is presented to a Compatriot for distinguished service rendered to the state society on the state level during a state society's president's term of office.

THE DAUGHTERS OF LIBERTY MEDAL

The Daughters of Liberty Medal, authorized in 1992, may be presented by the national society, a state society, or chapter to a lady recommended by any officer of a chapter, state or national society, SAR in appreciation for her unselfish devotion, tireless efforts, and assistance to the SAR, and who has dedicated her time, energy, ability and/or finances to the organization in support and furtherance of the stated objectives of the National Society SAR. The medal is considered second in importance only to the SAR Gold Good Citizenship Medal and it ranks all other SAR medal awards to ladies.

Past Recipients of the PATRIOT MEDAL, DISTINGUISHED SERVICE MEDAL, & DAUGHTERS OF LIBERTY MEDAL



California Society
Sons of the American Revolution

November 7, 2015

EXHIBIT Y

Distinguished Service

Medal Recipients

Ronald D. Risley, Esq. 1999
 Donald N. Moran 2000
 Robert F. Jackson 2001
 Clarence J. Lucas 2002
 Charles R. Lampman 2003
 Travis E. Spears 2004
 Julius W. "Bud" Marquette 2005
 Rex B. Shannon 2006
 Richard Andriano-Moore 2007
 Stanley G. Henderson 2008
 Wayne A. Griswold, Sr. 2009
 Jim L. W. Faulkinbury 2011
 Stephen Renouf 2012
 Thom H. Chilton, Jr. 2013
 Karl W. Jacobs 2014
 Don Littlefield 2015

Patriot Medal Recipients

John O. Yeisser 1964
 Glendon C. Hall 1964
 John H. Crippen 1964
 George H. Todt 1966
 J. Wilfred Cart 1966
 Lloyd M. Harmon 1967
 Dale D. Rosenkrans 1968
 Carl N. Helmeck 1968
 Robert H. Swadley 1969
 Nathan C. Sweet, Jr. 1969
 Ward B. Jenks 1970
 Earl Van Dusen 1970
 Robert W. Miller 1970
 Henry L. Lee, II 1971
 Marston Watson 1971
 Robert H. Fulton 1973
 George L. Hewitt 1973
 Milton A. Wise 1973
 William E. Mendenhall 1973
 Richard E. Sweet 1974
 Rolland S. Thomas 1974
 Calvin E. Chunn 1976
 Charles A. Ireland 1976
 Bergen H. Van Brunt 1976
 W. Edward Searing 1978
 Earl B. Stover 1978
 Thomas Darby 1978
 Donald Lewis 1978

Allen H. Reid

Dr. Robert W. Formhals 1981
 Joseph W. McLark 1981
 Carl H. Lamb 1982
 Arthur W. Barrett 1983
 William E. Searling 1983
 Trevenen A. Wright 1983
 Col. Thomas D. Gillis 1983
 Arthur L. Scott 1984
 Donald N. Moran 1984
 Leland B. Hawkins 1985
 Charles Vencill 1985
 Roger E. Robertson 1985
 Richard Andriano-Moore 1985
 Col. John C. Sparrow 1986
 J. Rey Hatfield 1986
 Jess T. Wolfe 1988
 F. Gage Biren 1988
 Maurice S. Lanning 1988
 Ralph A. Cangson 1989
 John R. Morgan 1989
 Col. Richard F. Locke 1990
 Frederick R. Rupert 1990
 Dr. Vernon C. Harp 1990
 Sherman B. Boivan 1990
 Hugh F. Fitzpatrick 1991
 James H. Reynolds 1991
 F. DeWitt Hoffman 1991
 Earl F. Rawlings 1992
 George S. Van Dorn 1992
 William J. Taylor 1993
 Arthur L. Ogilvie 1993
 Vernon D. Pharr 1993
 Thomas W. Armour 1994
 Howard E. Lohnes 1994
 Ronald D. Risley, Esq. 1994
 Robert C. Emrey 1995
 Robert von Pagenhardt 1995
 Robert F. Jackson 1995
 James Morgan 1996
 Frank Budroe 1996
 James O. Schuyler 1996
 Charles D. Conyers, II 1997
 Gary A. Dickey 1997
 Garrett F. Jackson 1997
 Harold L. Worrell 1997
 Julius W. Marquette 1998
 Edward St. Germain, Esq. 1998

David M. Leonard

Travis E. Spears 1999
 Clarence E. Lucas 1999
 Richard M. Small 1999
 Walter L. Davis 2000
 Richard L. Schmidt 2000
 Charles R. Lampman, Jr. 2000
 Berni K. Campbell 2001
 Edward Seabee 2001
 Gale T. Cornwell, II 2001
 Thomas H. Chilton, Jr. 2002
 Rev. Dr. Stanley DeLong 2002
 Stephen R. Renouf 2003
 Floyd J. Shadwick 2003
 Millard W. Miles 2003
 Stanley G. Henderson 2003
 Larry J. Magerkurth 2004
 Earl L. Young 2004
 Karl W. Jacobs 2004
 Robert M. Damon 2005
 James F. Blauer 2005
 John L. Dodd, Esq. 2005
 Rev. Louis V. Carlson 2006
 Robert D. Ebert 2006
 Michael F. Boyd 2007
 Jameson B. Bates 2007
 Phillip L. Hinshaw 2007
 Jim L. W. Faulkinbury 2008
 Wayne A. Griswold, Sr. 2008
 Curtis M. Porter 2008
 Dr. Phillip Dodson 2008
 Michael J. Howard 2009
 Richard D. Hawley, Esq. 2009
 James Quinnelly 2009
 Robert L. Wynne 2010
 Ernest F. Latham, MD 2010
 Keith L. Bigbee 2010
 Edward L. Rudisill 2011
 M. Kent Gregory 2011
 James C. Fosdyck 2011
 Clarence Lambing 2012
 Ronald J. Barker 2012
 Douglas Q. Bergholdt 2013
 Owen R. Stiles 2013
 Thomas C. Adams 2013
 Terry L. Briggs 2014
 Robert Taylor 2015
 J. Jeffries Goodwin 2015

Daughters of Liberty Medal Recipients

Virginia Emrey 1994
 Wilma Biren 1995
 Linda Moran 1996
 Doria Kemper 1996
 Jean McNew 1996
 Dorothy Kerrigan 1996
 Jane Hawkings 1997
 Edith Searles 1997
 Helen Barrett 1997
 Roxie Conyers 1997
 Elizabeth Vencill 1998
 Jean Bowles 1998
 Clarabelle McLaughlin 1998
 Rosemary Risley 1998
 Bobbi Jackson 1999
 Doris Emerson 1999
 Gloria Marquette 1999
 Carole Belcher 1999
 Francelle Spears 2000
 Gloria D. Schmidt 2001
 Linda S. Calvin 2002
 Barbara J. Magerkurth 2002
 Kathleen Watson 2003
 Joan DeLong 2004
 Jane Lambing 2004
 Linda Henderson 2005
 Louise Locke 2005
 Anne Lampman 2007
 Sandra C. Jacobs 2008
 Susan Shadwick 2008
 Joanne Murphy 2009
 Coreena Ross 2009
 Joy G. Javellana 2009
 Karen Carlson 2009
 Un Hui Yi 2010
 Yondie D. Griswold 2011
 Karen Dodd 2012
 Cindy Bigbee 2013
 Connie Barker 2014
 Lisa Gregory 2014
 Karen Faulkinbury 2015