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4/18

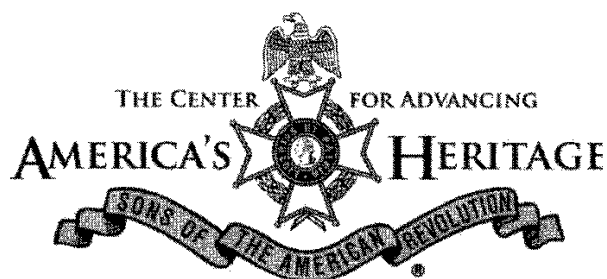
CASSAR ATTENDANCE SHEET					
OFFICERS	PRESENT	ABSENT		PRESENT	ABSENT
President	✓			✓	
Executive Vice-President	✓				Budget
Vice-President North	✓				"
Vice-President South	✓				"
Vice-President Membership	✓			✓	
Secretary	✓				"
Treasurer	✓				"
Registrar	✓			✓	
Historian	✓			✓	
Genealogist	✓			✓	
Chancellor		✓			✓
Chaplain		✓		✓	
Surgeon		✓			✓
Trustee(Funds) R.H.	✓			✓	
Trustee(Funds) S.R.	✓			✓	
Trustee(Funds) C.P.	✓			✓	
National Trustee		✓			Budget
Chapter Represented					
Butte		✓			✓
Central Coast		✓			✓
Coachella Valley	✓			✓	
Delta	✓			✓	
General George Patton	✓			✓	
Gen. George Washington	✓			✓	
Gold Country	✓			✓	
Harbor	✓			✓	
Kern		✓		✓	
Monterey		✓			✓
Mother Lode	✓			✓	
Orange County	✓			✓	
Redding		✓			✓
Redlands		✓		✓	
Redwood Empire	✓			✓	
Riverside	✓			✓	
Sacramento	✓			✓	
San Diego	✓			✓	
San Francisco	✓			✓	
Santa Barbara	LATE	✓		✓	
Silicon Valley	✓			✓	
Sons of Liberty		✓			✓
South Coast					✓
Thomas Jefferson	✓			✓	
TOTALS					

EAGLE

Yosemite

✓

✓



Donation and/or Confidential Pledge Commitment

DONOR INFORMATION:

Donations are tax deductible to the extent allowed by law.

Name: _____ National SAR #: _____
(NSSAR Member)

Mailing Address: _____

City, State, Zip: _____

Home #: (____) _____ Work #: (____) _____ Cell #: (____) _____

Email: _____

DONATION / PLEDGE AMOUNT:

I/We pledge to support The SAR Foundation and the Center for Advancing America's Heritage Capital Campaign.

With a gift enclosed of: \$ _____, and/or pledge of: \$ _____, totaling \$ _____

PLEDGE PERIOD:Pledge will be payable over (check one): ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 years

First payment will begin: _____

PAYMENT OPTIONS:☐ Please bill me:☐ Annually in the month of _____; or Semi-Annually in the months of _____ and _____☐ Other: _____☐ Please charge my: ☐ Visa ☐ MasterCard ☐ AMEX ☐ Discover

Card #: _____ Expiration: _____ Security Code: _____

☐ Monthly in the amount of: \$ _____☐ Annually in the amount of: \$ _____ in the month of: _____☐ Semi-Annually in the amount of: \$ _____ in the months of: _____ and _____☐ Full payment enclosed. *Please make checks payable to "The SAR Foundation"*☐ Gift of Stock. *Please contact us at 502-315-1777 for stock information and instructions.*☐ My gift will be matched by my Company.☐ I am interested in a gift through my estate or will, please call me at (____) _____**This statement of Pledge Commitment constitutes a declaration of intent.**

Signature: _____ Date: _____

The SAR Foundation, Inc.
Center for Advancing America's Heritage
PO Box 1776
Louisville, KY 40201-1776
502-315-1777 (Phone)
502-589-1671 (Fax)

The SAR Foundation, NSSAR

A LEGACY SOCIETY

THE SAR FOUNDERS CIRCLE

The Founders Circle is formed to recognize and thank all who contribute to The SAR Foundation endowment and or general funds by having made plans to make a specific bequest to the NSSAR/SAR Foundation in their estate plan. Membership in the SAR Founders Circle is available to individuals who have provided for the SAR Foundation by:

- 1) Naming The SAR Foundation as a beneficiary in a will, trust agreement or retirement plan for a cash or equivalent (stocks, bonds, life insurance policy, retirement or other benefit account, IRA, etc.) contribution,
- 2) Establishing a charitable remainder trust or a charitable lead trust naming The SAR Foundation as a beneficiary or owner,
- 3) Giving a tangible asset such as a real estate bequest with or without a retained life interest.

The minimum gift for membership is \$10,000 and SAR Founders Circle membership is in perpetuity.

To document your intentions, please complete the SAR Founders Circle data sheet below and return it to The SAR Foundation office. Information will be kept in strict confidentiality.

Membership names may be published, though anonymity is the member's choice.

SAR Foundation Founders Circle

Confidential Data Sheet

Name _____ Birthdate _____ Nat'l # _____

Spouse's Name _____ Birthdate (optional): _____

Address _____ City _____ State _____ Zip _____

Phone Number _____ Email Address _____

Please check the appropriate boxes.

I/We have made provision(s) for The SAR Foundation as follows:

☐ outright bequest payable upon my/our death(s) directly to SARF

☐ provision in will of surviving spouse payable to SARF at death

☐ present charitable trust with trustee other than SARF

☐ life insurance payable to SARF

☐ named SARF as beneficiary of retirement plan

☐ charitable trust to be established at death, payable to SARF

☐ added a codicil to name SARF as a recipient of proceeds

☐ other _____

Estimated value payable to SARF \$ _____

I/We would like SARF to use the gift for the following purpose:

☐ Permanent Endowment

☐ Operations / Museum

☐ Capital Expense Needs

☐ Youth Program(s) _____

☐ Civic Program(s) _____

☐ Other _____

Note: Undesignated assets will be added to the endowment fund. The income will be used at SARF discretion based upon needs at the time.

Date _____ Signature _____

Note: Minimum gift for SAR Founders Circle membership is \$10,000.

LETTER OF INTENT

FROM: _____

TO: Beneficiaries of my Estate

RE: Gift to the Sons of the American Revolution Foundation, Inc.

DATE: _____

Dear Family,

During my lifetime, my association with the Sons of the American Revolution meant a great deal to me. I have indicated to SAR Foundation that upon my death, my estate will give \$ _____ to the SAR Foundation.

In order to make administration to my estate less complicated, however, I have not formally added this charitable bequest to my will. I do, however, want my wishes carried out and I am trusting and depending upon you to make the above payment to The SAR Foundation from the assets you receive from my estate. This allows me to satisfy the pledge I made to The SAR Foundation during my lifetime.

The payment should be sent to the following address:

The SAR Foundation, Inc.
809 W Main St.
Louisville, KY 40202

Signature of Donor

State Society

National Number

STATE OF _____

COUNTY OF _____

CODICIL

I, _____, do make, publish, and declare this to be a

Codicil to my Will dated _____.

Except as hereinafter modified, I hereby remake, republish, and redeclare my said Will.

ITEM 1.

I HEREBY add a specific bequest to my Will as follows:

I bequeath the sum of \$_____ to
the SAR Foundation of the National Society Sons of the American Revolution
headquartered in Louisville, Kentucky.

IN WITNESS WHEREOF, I, _____, sign my name
to this Codicil this _____ day of _____, 20____, and being first duly
sworn, do hereby declare to the undersigned authority that I sign and execute this instrument
as a codicil to my last will and that I sign it willingly, that I execute it as my free and voluntary
act for the purposes therein expressed, and that I am eighteen years or age or older, of sound
mind, and under no constraint or undue influence.

_____(SEAL)
Signature of Maker (Donor)

We, _____ and _____, the witnesses, sign
our names to this instrument, being first duly sworn, and do hereby declare to the undersigned
authority that the maker signs and executes this instrument as a codicil to his/her last will and
that he/she signs it willingly, and that each of us, in the presence and hearing of the maker, hereby
signs this codicil as witness to the maker's signing, and to the best of our knowledge the maker is
eighteen years of age or older, of sound mind, and under no constraint or undue influence.

Signature of Witness 1 _____

Signature of Witness 2 _____

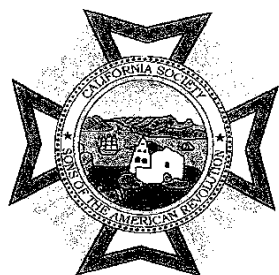
STATE OF _____

COUNTY OF _____

Subscribed, sworn to and acknowledged before me by _____, the Maker,
and subscribed and sworn to before me by _____,
witnesses, this _____ day of _____, 20____.

My Commission Expires:

Notary Public



The California Society
of the
Sons of the American Revolution

Instituted October 22, 1875
Organized July 4, 1876, Incorporated February 17, 1890

ROBERT L. TAYLOR
Treasurer
5277 Shiloh Way
Venture, CA 93003-7351
Tartar-taylor@att.net

TREASURER'S REPORT
YEAR ENDING DECEMBER 31, 2014

The following is the income statement for the year ending December 31, 2014. This includes the actual receipts and expenses compared to the budget for 2014.

CASSAR
2014 INCOME STATEMENT - ACTUAL TO BUDGET

	<u>Ending</u> <u>Jan - Dec 14</u>	<u>Budget</u> <u>FY2014</u>	<u>Variance</u> <u>FY2014</u>
Ordinary Income/Expense			
Income			
I-01A · Annual Dues Received - CASSAR	\$ 27,413	\$ 25,960	\$ 1,453
I-01B · Annual Dues Received - NSSAR	\$ 35,095	\$ 39,220	\$ (4,125)
I-03A · CASSAR LM Dues from Inv Fund	\$ 5,602	\$ 5,598	\$ 4
I-03B · NSSAR LM Dues from Inv Fund	\$ 9,240	\$ 9,330	\$ (90)
I-03B · Chapter LM Dues from Inv Fund	\$ 3,090	\$ 3,110	\$ (20)
I-05 · New Member State Fee	\$ 4,260	\$ 3,000	\$ 1,260
I-06 · Supplemental App State Fee	\$ 730	\$ 300	\$ 430
I-08 · Checking Account Interest	\$ 8	\$ 2	\$ 6
I-09 · Reinstated Member Fee	\$ 820	\$ 1,300	\$ (480)
I-14 · Interest Income-San Diego Fund	\$ 1,384	\$ 1,250	\$ 134
I-16 · New Life Member Fees	\$ 351	\$ 2,000	\$ (1,649)
I-17 · Income from Other Sources	\$ 61	\$ -	\$ 61
I-21 · Income from Medals & Certs	\$ 620	\$ -	\$ 620
I-25 · Donations	\$ 1,265	\$ -	\$ 1,265
I-60 · Compatriot Postage	\$ 20	\$ -	\$ 20
I-62 · Compatriot Subscriptions	\$ 30	\$ 1,000	\$ (970)
I-99 · Miscellaneous	\$ 175	\$ -	\$ 175
I-999 · Transfer-in From Educ Fund	\$ -	\$ 1,641	\$ (1,641)
Total Income	\$ 90,164	\$ 93,711	\$ (3,547)
Operating Expenses			
Executive Committee Expenses			
A-01 · President Expenses	\$ -	\$ 500	\$ (500)

A-02 · Executive VP Expenses	\$ -	\$ 300	\$ (300)
A-05 · VP-Membership Expenses	\$ 119	\$ 1,950	\$ (1,831)
A-06 · Executive Secretary Expenses	\$ 1,173	\$ 1,500	\$ (327)
A-07 · Treasurer Expenses	\$ 141	\$ 300	\$ (159)
A-08 · Registrar Expenses	\$ 309	\$ 500	\$ (191)
A-03 · VP North Expenses	\$ -	\$ 100	\$ (100)
A-04 · VP South Expenses	\$ -	\$ 100	\$ (100)
A-09 · Genealogist Expenses	\$ -	\$ 50	\$ (50)
A-11 · Chancellor Expenses	\$ -	\$ 100	\$ (100)
A-12 · Historian Expenses	\$ -	\$ 100	\$ (100)
A-14 · Chaplain	\$ -	\$ 100	\$ (100)
Total Executive Committee Expenses	\$ 1,742	\$ 5,600	\$ (3,858)

Committee Expenses

B-21 · Awards & Medals Com	\$ 1,250	\$ 1,300	\$ (50)
B-22 · Best Chapter Contest	\$ 187	\$ 650	\$ (463)
B-24 · New Chapter Assistance	\$ -	\$ 250	\$ (250)
B-27 · Poster Contest Expenses	\$ 545	\$ 475	\$ 70
B-29 · Brochure Contest	\$ 645	\$ 700	\$ (55)
B-30 · Oration Contest	\$ 1,530	\$ 1,520	\$ 10
B-33 · JROTC Committee	\$ 1,637	\$ 1,650	\$ (14)
B-34 · CAR Expenses	\$ 825	\$ 1,350	\$ (525)
B-35 · Eagle Scout Contest	\$ 1,358	\$ 1,520	\$ (162)
B-39 · Essay Contest Expenses	\$ 1,077	\$ 1,520	\$ (444)
B-41 · Spring Meeting Allowance	\$ 300	\$ 300	\$ -
B-42 · Fall Meeting Allowance	\$ 205	\$ 300	\$ (95)
B-43 · BOM PG Expenses	\$ 689	\$ 1,900	\$ (1,211)
B-60 · Valley Forge Contest	\$ 3,750	\$ 3,800	\$ (50)
Total Committee Expenses	\$ 13,998	\$ 17,235	\$ (3,237)
		\$ -	

Program Expenses

C-45 · California Compatriot	\$ 1,131	\$ 900	\$ 231
C-49 · CASSAR Flag Expenses	\$ 370	\$ 1,000	\$ (630)
C-50 · Congress Hospitality Suite	\$ 704	\$ 500	\$ 204
Other	\$ -	\$ 750	\$ (750)
Total Program Expenses	\$ 2,205	\$ 3,150	\$ (945)

Other Expenses

E-01 · Annual Dues to NSSAR	\$ 44,335	\$ 48,550	\$ (4,215)
E-02 · LM Dues to Chapters	\$ 3,040	\$ 3,110	\$ (70)
E-03 · Filing Fees	\$ 25	\$ 55	\$ (30)
E-10 · Liability Insurance Expenses	\$ 770	\$ 890	\$ (120)
E-11 D & O Insurance	\$ -	\$ 1,400	\$ (1,400)
E-30 · Storage Rent & Supplies	\$ 528	\$ 550	\$ (22)
E-40 · Other CASSAR Expenses	\$ 20	\$ 2,000	\$ (1,980)
E-55 · The SAR Foundation	\$ -	\$ 1,750	\$ (1,750)

E-70 · Richard F. Locke Award	\$ -	\$ 1,250	\$ (1,250)
Total Other Expenses	\$ 48,718	\$ 59,555	\$ (10,837)
State Taxes	\$ -	\$ 25	\$ (25)
Total Operating Expenses	\$ 66,663	\$ 85,565	\$ (18,902)
Net Operating Income	\$ 23,501	\$ 8,146	\$ 15,355
Transfers to Investment Accounts			
Congress Fund	\$ 2,000	\$ 2,000	\$ -
Donations	\$ 360	\$ -	\$ 360
SD Fund Interest	\$ 1,384	\$ 1,250	\$ 134
New Life Member Fees	\$ -	\$ 300	\$ (300)
Non-LM Fees	\$ 5,757	\$ 4,596	\$ 1,161
Operating Surplus	\$ -	\$ 8,146	\$ (8,146)
Total Transfers To Invest Accounts	\$ 9,501	\$ 16,292	\$ (6,791)
Net Operating Cash	\$ 13,999	\$ (8,146)	\$ 22,145

Notes to Income Statement:

Receipts:

1. Pass Through Receipts
 - a. NSSAR Annual Dues are receipts from members that are sent directly to National. These funds are not budgeted for operation use and, as such, have no adverse effect on the operating cash flow.
 - b. New Life Member Fees – as with the pass through receipts, all new life member fees are transferred to the investment account and not used for operating purposes.
 - c. San Diego Fund Interest – the interest received from the San Diego fund is transferred to the investment account and not used for operating purposes.
2. Education Fund – no transfers were made to the operating account from the Education Fund investment account.
3. New Member Fees were favorable to budget.
4. Donations – \$1,210 of the donations was from the Intel Charitable Match Trust directed by Compatriot Don Littlefield ... Thanks Don.

Expenses:

1. Executive Committee Expenses – there is a favorable variance of \$3,858. This is due to underspending by some Executives, and out-of-pocket expenses not requested for reimbursement.
2. Committee Expenses – there is a favorable variance of \$3,237. This is due to underspending in all categories.
3. Program Expenses – the favorable variance is a result of underspending for the CASSAR Flag program and the Congress Hospitality Suite.
4. Other Expenses – the favorable variance of \$10,873 is due to underspending in all related categories.

Transfers to Investment Accounts – refer to the Investment Committee Report.

Balance Sheet

The Balance Sheet at December 31, 2014 included the following account balances:

Assets

Cash and Savings	\$ 68,951
Investment Account	<u>\$ 343,932</u>
Total Assets	\$412,883

Liabilities

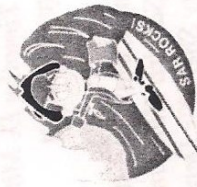
\$ -0-

Equity

\$412,883

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.*



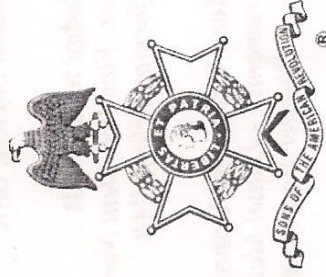
SAR Recessional

*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 Spring Meeting
1876 – 2015

Public Service Luncheon



Friday, April 17, 2015

Wyndham Irvine Hotel
Irvine, California

Program

Opening Ceremonies

Invocation

*Richard Adams, Chaplain
Orange County Chapter, SAR*

Pledge of Allegiance

*Lindsey Brock, President General
National Society, SAR*

Pledge to the SAR

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

Introduction of Head Table and Honored Guests

*Master of Ceremonies - Daniel McKelvie
Orange County Chapter Past President*

Greetings

*Lindsey Brock, NSSAR President General
Jim Klingler, Orange County Chapter President*

Lunch

Presentation of Awards
*Jim Faulkinbury, President
California Society, Sons of the American Revolution*

Heroism Medal
*Lifeguard Ben Carlson
City of Newport Beach*

Fire Safety Commendation Medal
*Firefighter Timothy D. Mitchell
City of Avalon*

Law Enforcement Commendation Medal
*Sheriff Sandra Hutchins
Orange County Sheriff's Department*

Closing

SAR Recessional
*Phillip Hinshaw, Vice President – Membership
California Society, SAR*

Benediction
*Richard Adams, Chaplain
Orange County Chapter, SAR*

2014 Public Safety Awards

In our daily lives, we as citizens and the public in general, go about our business with little anxiety or fear without really thinking about it. Our activities interact with a multitude of others who generally feel the same way and our progress is basically unimpeded. Of course it is no accident that we feel this way. We have designed our society with built in assurances that we can perform our activities with little hindrance. In the event of an emergency, the community has requested individuals, as a group or solitarily, to take on the tasks that the public cannot or will not perform. It is to these members of our society we are truly grateful.

We, as an organization, on an annual basis make the hard decision to single out individuals from many deserving potential recipients for special recognition for their dedication and contributions for the year. Although we only see them occasionally, they are here for us twenty four hours a day and all year long.

This year, 2014, was like all previous years that we experienced from our public safety personnel. There were individuals who performed their service to the community valiantly and loyally beyond our expectations. Unlike many years of recognition, 2014 proved to be a year of great loss and the community continues to mourn the passing of two of our bravest and most respected heroes. Although we all acknowledge the risk involved in public safety, the reality of the job couldn't be more visible this year and for this reason we are recognizing these Americans for their dedication and bravery.

Will the representatives for the City of Newport Beach please step forward.

Gary Conwell : Lifeguard supervisor and officer. length of service :19 years

George Leeper: Lifeguard supervisor and officer. Length of service: 18 years

The City of Newport Beach employs 200 lifeguards, 80 of which are seasonal employees. The beaches in Newport experiences approximately 10,000,000 visitors each year. Newport lifeguards make 3000-5000 rescues annually. During the year the guards also make approximately 250,000 public contacts and perform between 4000-7000 medical aids.

Among the city's fleet of vehicles and equipment are three rescue boats. Some of the duties include inside surfline rescue, boating rescues and assists and safety awareness. The Newport Lifeguards make more public contacts than any other department in the city of Newport Beach.

Today, Gary and George are here to accept our recognition of:

EXHIBIT-I

Ben Carlson

Ben Carlson was born in 1982 and grew up in Alta Loma , California. His passion was to visit Newport Beach every summer as a child. His love of the water was evident of his interest in competitive swimming , water polo, and surfing while growing up. His enthusiasm and dedication to the water locked him into a position on UCI's water polo team where he excelled while attending college.

Ben started working as a lifeguard for the City of Newport Beach at 16 years old and spent the entire summer in Newport Beach as he worked. He was known to the other guards as one of their top swimmers and athletes. Ben was familiar with all aspects of lifeguarding including the particular tides, swells, and currents in specific and infamous parts of the Newport coast. These areas included the world famous "Wedge", "The Point", Corona Del Mar, and all of the 7 miles of beach included in his duties. Not to be excluded was his teaching of the Junior Life Guards about the ocean and personal mentoring of his younger peers.

On July 6, 2014, there was unusually high surf from residual hurricane weather pounding the Newport coast. There was high danger to swimmers and beach goers. Ben was assigned to Sea Watch 2, one of Newport's three rescue boats. The boat was patrolling the surf line at "the Point" when a swimmer in distress was spotted. Sea Watch 2 positioned itself within the 15 foot swells to afford the rescue. With its transom facing the shore, Ben entered the large waves to bring the swimmer to safety. During the rescue a large set of waves consumed both swimmers. Ben did not resurface after one of the powerful waves passed over him. Ben became the first line of duty loss in the 100 year history of Newport Beach. The distressed swimmer did survive.

It is with deep respect that we recognize Ben Carlson for his selfless dedication to duty and for the bravery he displayed during circumstances that most individuals would reject due to the danger.

(Mention the foundation formed to provide 2 annual scholarships for \$10,000 each for student s who show dedication and hard work skills such as the skills Ben displayed)

Will Brian Bray and Bob Kennedy of the city of Avalon please come forward.

Representing the Avalon Harbor Department is Harbor Master Brian Bray

Representing the Avalon Fire Department is Captain Bob Kennedy

Timothy D. Mitchell

Just off the Southern California Coast lies the destination for over a million annual visitors. Sightseers, fishermen, boaters, divers, cruise ships, athletes, adventurers, scientists, and more, travel to this Pacific Ocean gem approximately 30 miles off the coast. The common denominator for the visitors is the ocean surrounding this California isle. The approximate 4000 permanent residents on Santa Catalina Island have not only become the caretakers of the Island and its waters but of the fluctuating seasonal population.

Avalon is no different than our best American cities. Avalon has not only the normal duties needed to run the infrastructure of an American city but the added challenges that mother nature's ocean has to offer. One of the expected challenges is bad weather and storms in the winter. As all emergencies, the reason we have our first responders and safety personnel is for the unforeseen. On the night of December 30, 2014, the unforeseen happened when a Nor' Easter unexpectedly hit Avalon Bay.

The surprise storm caught the bay with a vengeance seldom seen. The more-than-usual visiting boats were moored on the cans as the boaters were preparing for the popular annual New Year's celebration ashore. The wind whipped through the harbor generating large and formidable waves. The storm waves crashed ashore carrying boats, debris and moorings to the beach and sea wall. There were people trapped on their boats. The larger boats on the outside were breaking loose and taking the boats and moorings on the inside to the beach. Tim, performing his job as a Harbor Patrol skipper, boarded one of the larger and well known Catalina boats known as the King Neptune. Tim's goal was to get the boat out of the harbor in order to prevent it from taking out the smaller boats and boaters on the inside moorings. The large waves and surge as well as the debris and mooring lines trapped the King Neptune inside and sent the large boat ashore where it was shattered by the relentless surf and Tim was lost in the beaching of the King Neptune.

Tim was born January 30, 1975 in New Zealand. He moved to Avalon from New Zealand 13 years ago. He was an accomplished diver and found his niche as a Diving Instructor and Licensed skipper. He loved Avalon and its people. His love of his new home and residents motivated Tim to become a reserve fireman for Avalon. For over 5 years Tim could be seen on the everyday community emergencies helping the town and the people he loved. A year ago, Tim was given the opportunity to apply his expert nautical skills as a Harbor Patrol Officer. His knowledge of the sea, dedication to Avalon and personal skills were not ignored by the City of Avalon and he became one of Avalon's most important employees. His job was to keep the harbor and the people in the bay safe. His seamanship and knowledge was a perfect fit.

Although Tim was a talented young man and had many goals, five months ago Tim accomplished another goal that he set for himself that proved his dedication and love for his new home. Tim became an American Citizen.

It is with the deepest gratitude and respect that we honor Timothy D. Mitchell, Harbor Patrol Officer and Firefighter for the city of Avalon.

Will P.B. and Tony Underwood please come forward:

P.B. aka Pretty Boy

During the storm in Avalon on December 2014, as the harbor struggled for survival, two well known friends of Avalon and many visiting boaters were in dire straits. 53 year old Bruce Ryder, business owner and boat resident, and P.B.,(also known as Pretty Boy), his faithful companion, were in the water after their boat had been destroyed by the treacherous wind and surf.

P.B was always with Bruce and the residents of Avalon and the visiting boaters would often see Bruce and P.B. on their dinghy cruising through the harbor on one errand or another. There was always a waving of the hand from the boats to their favorite inter species couple. When Bruce and P.B. went ashore to socialize, they would go together to the World Famous Marlin Club to chat, drink 7 up, and have a cup of water.

Although Bruce was a licensed skipper and diving instructor the pounding waves made it impossible for Bruce to use any of his maritime and ocean skills to get ashore. The waves were so ferocious that they slammed into the seawall and pushed back out to sea with such intensity that the only solution appeared to be to ride it out in the water as long as possible.

Knowing the relationship between Bruce and P.B., one can imagine Bruce shouting to P.B. in the darkness above the howling winds to go ashore. Although P.B. is over 12 years old and he has seen stronger days, he somehow overcame the beat down of the crashing surf and made it onto the beach. Knowing that his master and companion continued to struggle in the surf, P.B. made for Bruce's and his favorite place where P.B. knew their friends would be. Soaking wet he made his way to the Marlin Club where there were familiar faces and looked to them for help. The friends, realizing that something was wrong seeing P.B. without Bruce, followed the faithful dog back to the sea wall to search in vain for his beloved master. For the next few days P.B laid on the floor at the Marlin Club with his head facing the door waiting for his companion, who would never return.

P.B. has become Avalon's favorite companion and friend. Tony Underwood and the Marlin Club is now the caretaker of this faithful canine. He has the good life among his many friends and gets a lot of love from everyone on the island.

As most of us know, people are not the only heroes in our midst. We often hear of animals and pets contributing to the safety and rescuing of humans. Today we

are recognizing P.B., also known as Pretty Boy, for his loyalty and courage under the worst of conditions in his attempt to save his best friend and companion.



*You and your Guest
are invited to attend the*

***California Society, Sons of the American Revolution
Officers' Dinner***

Friday Evening, April 17

6:30 p.m. No-host Drinks followed by Dinner

at

Il Fornaio

18051 Von Karman Avenue, Irvine, CA

(near the Wyndham Irvine Hotel)

Authentic, Award-Winning Italian Cuisine

Cost: \$48 per person

Payable to Orange County Chapter, SAR

R.s.v.p. by April 1 to

Jim Klingler (klingler@sbcglobal.net)

Please send Payment to:

Orange County Chapter, SAR

Jim Klingler

33 Bethany Drive

Irvine, CA 92603

THE CALIFORNIA SOCIETY
OF THE
SONS OF THE AMERICAN REVOLUTION
(CASSAR)

WHISTLEBLOWER POLICY

It is the responsibility of all CASSAR Officers, CASSAR Investment Fund Trustees and CASSAR Committee members to observe the highest standards of business and personal ethics in the conduct of their duties and responsibilities, to comply with the Conflict of Interest/Code of Organizational Conduct Policy and to report violations or suspected violations in accordance with this policy. No CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member who in good faith reports a violation shall suffer harassment or retaliation to the extent such harassment or retaliation shall occur. A CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including review by the Ethics Committee. An open door policy exists so that CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee members can share their questions, concerns, suggestions or complaints with someone who can address them properly. In most cases, the CASSAR President or his designee is in the best position to address an area of concern. However, if a CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member is not comfortable speaking with the CASSAR President or his designee or the CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member is not satisfied with the response provided, the CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member is encouraged to speak with the Chairman of the Ethics Committee, CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member are required to report suspected violations of the Conflict of Interest/Code of Organizational Conduct Policy to the Chairman of the Ethics Committee, whose committee has specific and exclusive responsibility to investigate all reported violations on behalf of the CASSAR President. For suspected fraud, or when a CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member is not satisfied or uncomfortable with following the open door policy, the CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member should contact the Chairman of the Ethics Committee directly.

I acknowledge receipt of the above document, that I have read it, and that I understand its contents.

PRINT NAME

SIGNATURE

TITLE/POSITION

DATE

THE CALIFORNIA SOCIETY

OF THE

SONS OF THE AMERICAN REVOLUTION

(CASSAR)

CONFLICT OF INTEREST/CODE OF ORGANIZATIONAL CONDUCT

SECTION 1. PURPOSE:

The California Society of the Sons of the American Revolution (known hereafter as CASSAR) is a not for profit, tax-exempt organization. Maintenance of its tax-exempt status is important for both continued financial stability, public and member support. Therefore, the Internal Revenue Service, as well as other regulatory agencies, tax officials and other stakeholders view the policy and operations of the SAR as a public trust, which is subject to scrutiny by and accountable to such authorities as well as its constituents.

Consequently, there does exist between the CASSAR and its officers, trustees, committee chairmen, and the general public a fiduciary duty that carries with it a broad and clear duty to fidelity and loyalty. The officers, trustees, and committee chairmen have the responsibility to administer the affairs in an honest and prudent manner, exercising the best skill, abilities and judgment for the sole benefit of the CASSAR. Those persons who serve in leadership capacities shall exercise good faith in all matters and transactions, and shall refrain from practices that allow personal gain or benefit due to knowledge or influence. The interest of the SAR shall be the priority in all decision and actions.

SECTION 2. PERSONS CONCERNED:

This code and statement is intended for all general officers, trustees, committee chairmen, and others as so determined by the board of managers of the CASSAR. All persons who may influence decisions of the CASSAR may be added at any time.

SECTION 3. AREAS OF POTENTIAL CONFLICT:

Conflicts may arise in relations to officers, trustees, and committee chairmen with any of the following third parties:

1. Persons and firms supplying goods and services to the CASSAR
2. Persons and firms from whom the CASSAR leases property or equipment.
3. Persons and firms with whom the CASSAR is maintaining or plans to maintain a business relationship that involves the sale of real estate, securities, or other property.
4. Competing or affinity organizations.
5. Donors and others supporting the CASSAR.
6. Agencies, organizations, and associations that affect the operations of the CASSAR.
7. Family members, close associates and other employees.

SECTION 4. NATURE OF CONFLICT OF INTEREST:

A conflicting interest may be defined as an interest, direct or indirect, with any person or firms mentioned in Section 3. Such interest may arise from the following activities:

1. Owning stock or holding debt or other proprietary interests in a third party dealing with the CASSAR.
2. Holding office, serving on the board, participation in management, or being otherwise employed or previously employed with any third party who conducts business or intends

- to conduct business with the CASSAR.
3. Receiving remuneration for services with respect to individual transactions involving the CASSAR.
 4. Using the time, personnel, equipment, good will or other resources of the CASSAR for activities other than approved activities, programs and functions.
 5. Receiving personal gifts, professional opportunities or loans from third-party vendors conducting business or intending to conduct business with the CASSAR. Receipt of any gift of cash is prohibited. Gifts with a value of less than \$25 (twenty-five dollars) may be accepted only if the acceptance avoids a discourtesy.

SECTION 5. INTERPRETATION OF POLICY:

The areas of conflicting interest listed in Sections 3 and 4 are examples of potential conflicts and may be expanded as situations dictate. All persons who serve in leadership and critical areas of the CASSAR shall use best judgment to determine any possible conflicts. The CASSAR Chancellor shall be consulted on any question of this policy.

Persons in leadership positions of the CASSAR shall disclose any potential conflict before transactions are consummated. The leadership shall scrutinize all transactions and disclose any activities that are, or have the appearance of, a conflict to the board of managers immediately upon knowledge of such activities.

This policy, once enacted, shall be mandatory for all affected members. Any change of the policy will require a two-thirds affirmative vote of the Board of Managers of the CASSAR. Such vote will occur at the Annual Meeting, or a Board of Managers Meeting.

SECTION 6. DISCLOSURE POLICY AND PROCEDURE:

Transactions with parties with whom a conflicting interest exists may only be undertaken when all four (4) of stipulations are met:

The conflict of interest is fully disclosed.

The person with the conflict refrains from discussion and approval of such transaction.

A competitive bid or comparable valuation exists.

The leadership, executive committee, board of managers, or duly constituted committee determines that the transaction serves the best interest of the CASSAR.

Disclosure shall be made to the CASSAR President (Executive Vice President if the President is the person in conflict) and the Chancellor, who shall bring the matter to the Board of Managers for discussion and resolution.

The duly constituted committee shall determine whether a conflict exists. Further, the constituted body shall determine in a fair, just, and reasonable manner if the approval of such transaction with the disclosed conflict best serves the interest and mission of the CASSAR.

Please circle one: I have / have never been convicted of a felony crime.

I acknowledge receipt of the above document, that I have read it, and that I understand its contents.

PRINT NAME

SIGNATURE

TITLE/POSITION

DATE

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.*



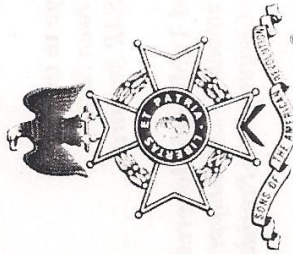
SAR Recessional

*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 Spring Meeting
1876 – 2015**

Youth Awards Luncheon



Saturday, April 18, 2015

**Wyndham Irvine Hotel
Irvine, California**

Program

Opening Ceremonies

Invocation

*Richard Adams, Chaplain
Orange County Chapter*

Pledge of Allegiance

*Stephen Renouf, Vice President General
National Society, SAR*

Pledge to the SAR

*Owen Stiles
CASSAR Registrar*

Introduction of Head Table and Honored Guests

*Master of Ceremonies - Dan Shippey
Orange County Chapter Past-President*

Greetings

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

Lunch

Presentation of Awards

Jim Faulkinbury, CASSAR President

Enhanced JROTC Program

*Cadet Claudia Jimenez
James C. Fosdyck, Chairman*

Eagle Scout Program

*Russell C. Cecil
Gary Jensen, Chairman*

Knight Essay Contest

*Heidi Lai
Keith Bigbee, Chairman*

Americanism Elementary School Poster Contest

David C. Gilliard, Chairman

Americanism Middle School Brochure Contest

Thomas C. Adams, Chairman

Best Chapter Contest

Philip Hinshaw, CASSAR Vice President

Closing

SAR Recessional

*Derek Brown, Youth Activities Director
California Society, SAR*

Benediction

*Richard Adams, Chaplain
Orange County Chapter*

California Society,
Sons of the American Revolution



Memorial Service
Saturday, April 18, 2015

*They shall not grow old,
As we that are left grow old.
Age shall not weary them
Nor the years condemn...
At the rising of the sun
And in the evening
We will remember them.*

Psalms 23

The Lord is my shepherd

I shall not want.

He maketh me to lie down in green pastures;

He leadeth me beside the still waters.

He restoreth my soul;

He leadeth me in the paths of righteousness

For his name's sake.

Yea, though I walk through the valley

Of the shadow of death,

I will fear no evil, for thou art with me.

Thy rod and thy staff, they comfort me.

Thou preparest a table before me

In the presence of mine enemies;

Thou anointest my head with oil;

My cup runneth over.

Surely goodness and mercy will follow me

All the days of my life,

And I will dwell in the house of the Lord forever.

Memorial Service

Earl Roger Adams
Central Coast Chapter

Cody Wells Blackshear
San Francisco Chapter

Frank H. Joseph Budroe
Gen. George Patton Chapter

Paul Reynolds Crouch
South Coast Chapter

Robert Dunlap Sr.
Redding Chapter

Joseph Leroy Frank
Butte Chapter

Joseph Edwin Hallam
San Diego Chapter

Louis Franklin Hanks
Gen. George Patton Chapter

Clarence Lawrence Lambing
Monterey Bay Chapter

Donald L. Lewis
Delta Chapter

Archie Lee McPherran
Sacramento Chapter

Col. Thomas Monroe, Jr.
Redding Chapter

George Peabody
Gold County Chapter

John Ellsworth Sholl
Coachella Valley Chapter

Edgar D. Whitley
Sons of Liberty Chapter

Rex Lowell Wilmer
Gold County Chapter

Charles Greenwood Wootton
San Diego Chapter

John Wright
Riverside Chapter

Prelude Kent & Lisa Gregory

Processional CASSAR Honor Guard

Welcome Chaplain Richard Adams

Invocation Chaplain Richard Adams

Pledge of Allegiance CASSAR President Faulkinbury

"Amazing Grace" Congregational Song

Roll Call of Remembrance Chaplain Richard Adams

Brief Eulogies..... Chapter Presidents or representatives

(In the absence of a eulogist, we will all say together

"We will remember our compatriot brother with thanksgiving.")

Special music Jim Blauer

Psalms 23 Congregational Prayer

Benediction Chaplain Richard Adams

RecessionalCASSAR Honor Guard

*Please remember to pray for the families
of our departed brethren and remember our compatriot
brothers with thanksgiving*

Amazing Grace

*If through the offence of one many be dead, much more the grace of God,
and the gift by grace, which is by one man, Jesus Christ, hath abounded unto many. Rom. 5:15*

1. A - maz - ing grace! How sweet the sound That saved a wretch like me!
 2. 'Twas grace that taught my heart to fear, And grace my fears re - lieved;
 3. Through man - y dan - gers, toils and snares, I have al - read - y come;
 4. When we've been there ten thou - sand years, Bright shin - ing as the sun,

I once was lost, but now am found; Was blind, but now I see.
 How pre - cious did that grace ap - pear The hour I first be - lieved.
 'Tis grace hath brought me safe thus far, And grace will lead me home.
 We've no less days to sing God's praise Than when we'd first be - gun.

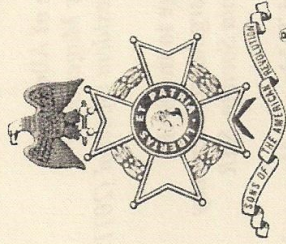
WORDS: John Newton, *pub.*1779; v. 4 Unknown, *pub.*1829. MUSIC: "New Britain"; Unknown, *pub.*1829. Public Domain.

EXHIBIT-R

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

**140th Spring Meeting
1876 – 2015**

Gala Inaugural Banquet

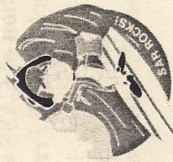


Saturday, April 18, 2015

Wyndham Irvine Hotel
Irvine, 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

Richard Adams, Orange County Chapter Chaplain

Presentation of the Colors

CASSAR Color Guard
James C. Fosdyck, Commander

National Anthem

James Blauer, CASSAR Historian

Pledge of Allegiance

Larry Magerkurth
NSSAR former President General (2011-12)

Pledge to the SAR

Douglas Bergtholdt, Secretary
California Society, SAR

Introduction of Head Table and Honored Guests

Master of Ceremonies – Joseph Dooley
NSSAR former President General (2013-14)

Surprise Greetings

Dinner

Ladies Auxiliary Raffle

Karen Carlson, Ladies Auxiliary President

Induction of New Members

Lindsey Brock, President General
National Society, SAR

Entertainment

Dave Champagne

Presentation of Awards

Jim L. W. Faulkinbury, CASSAR President

Farewell Remarks

Jim L. W. Faulkinbury, CASSAR President

Installation of CASSAR Officers

Lindsey Brock, NSSAR President General

Installation of Ladies Auxiliary Officers

Lindsey Brock, NSSAR President General

Acceptance Address

M. Kent Gregory, Ed.D.

Closing

SAR Recessional

Raymond Raser, President
San Diego Chapter, SAR

Benediction

Richard Adams, Orange County Chapter Chaplain

Retirement of the Colors

CASSAR Color Guard
James Fosdyck, Commander

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

April 18, 2015

Distinguished Service

<u>Medal Recipients</u>	
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

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	1981
Dr. Robert W. Formhals	1981
Joseph W. McClark	1982
Carl H. Lamb	1983
Arthur W. Barrett	1983
William E. Seearling	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. Bolvan	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	1998
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 Sebree	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
Jamieson 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. Fostdyck	2011
Clarence Lambing	2012
Ronald J. Barker	2012
Douglas Q. Bergholdt	2013
Owen R. Stiles	2013
Thomas C. Adams	2013
Terry L. Briggs	2014

<u>Daughters of Liberty Medal Recipients</u>	
Virginia Emrey	1994
Wilma Biren	1995
Linda Moran	1996
Doria Kemper	1996
Jean McNew	1996
Dorothy Kerrigan	1996
Jane Hawkings	1997
Edith Seafles	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
Francie 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
Barbara Magerkurth	2006
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
Cyndy Bigbee	2013
Connie Barker	2014
Lisa Gregory	2014