

Friendly Fifth Friday News September 15, 2017

In an attempt to help our lodge leaders become more familiar with resources, changes, deadlines and other information, I will compile a weekly "Friendly Fifth Friday News" email to our leadership. Some of the information you might already have, but hopefully it will be a good reminder for all of us (me included) of all the great resources that Sons of Norway has to offer. **Please feel free to cut and paste any of this information for your lodge's use!**

Darlene Arneson, District 5 Secretary

Send all web posting info to inputd5@sonsofnorway5.com

Questions on the new dues structure? 2018dues@sofn.com

Is your lodge ready for Foundation Month? Resources you can use!

<https://www.sofn.com/foundation/>

The screenshot shows the website for the Sons of Norway Foundation. At the top, there is a navigation bar with links for Convention, Donate, FBC Resources, E-Post Signup, Events, and Profile. A search bar labeled "MEMBER RESOURCES" is also present. Below the navigation bar is a main menu with links for About Us, Financial Products, Member Benefits, Norwegian Culture, Foundation, and Blog. The main content area features a large banner image of a flooded street with cars, overlaid with the text "Be Their Lifeline" and "Let's help out our members hurt by Hurricane Harvey". A "Donate Now" button is prominently displayed. Below the banner, the text reads "Faithful to our mission and members." followed by a paragraph describing the foundation's mission. A list of four focus areas is provided: creating opportunities for higher education, showcasing Norwegian heritage, exploring cross-cultural exchanges, and providing humanitarian support. To the right, there is a video player showing a play button over an image of the American, Norwegian, and Canadian flags. The Windows taskbar at the bottom shows the time as 5:54 AM on 9/15/2017.

Faithful to our mission and members.

The Sons of Norway Foundation is dedicated to funding activities that preserve and promote Norwegian heritage, positively affect members, and make Sons of Norway communities a more vibrant place to live. Be it through a student's scholarship for study, a cultural exchange experience, or assisting lodges to provide quality programs and community events – the Sons of Norway Foundation is true to its mission.

Established in 1966, our focus and offerings have grown to include several categories of scholarships and four categories of grants. Our passion is focused on the following areas:

- Creating opportunities for higher education as a means for success.
- Showcasing our unique Norwegian heritage to wider audiences.
- Exploring cross-cultural exchanges.
- Providing humanitarian support to Sons of Norway members who are victims of natural disasters.

We have awarded \$1,375,000 in scholarships, \$390,000 in grants and more than \$500,000 in humanitarian aid. Take a closer look at our efforts, the results, and opportunities to get involved on the following pages.

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[Donate](#)

The Foundation wouldn't exist without member support – find out how you can donate today and be part of the great works we're accomplishing.

Scholarships

The Sons of Norway Foundation funds several unique scholarship opportunities for students and encourages cross-cultural exchange between Norway and the United States.

Grants

The Sons of Norway Foundation offers four categories of grants that provide funding for Norwegian themed programming. Learn more about these opportunities, as well as how we partner with lodges in their community efforts.

Humanitarian Fund

Since 1997 the Foundation has awarded over \$500,000 in humanitarian aid to our members and their communities following natural disasters.

Annual Reports

We're making a difference – with donations from members, lodges and friends of the Sons of Norway Foundation. Our annual reports bear witness to your generosity as well as the resounding influence of every single donation, from the stories of students who studied in Norway, to the families attending a sponsored exhibit, and so much more.

Oversight and Governance

The Sons of Norway Foundation plays a vital role in the lives of our members and their communities. Learn more about the people who guide our efforts and see the results for yourself in the latest annual report.

Sons of Norway Foundation in Canada

The Sons of Norway Foundation in Canada provides scholarships for post secondary education in Canada for Canadian residents. Makes available bursaries for Norwegian heritage activities and cultural exchanges as well as humanitarian causes.

Sons of Norway Foundation Klubb



Everyone would like to be remembered, to feel that they've contributed something to the world and to leave a legacy. Now, the Sons of Norway Foundation has made it easier to do just that through its [Klubb program](#). This is a brand new way to make a lasting commitment to supporting our lodges, assisting those affected by natural disasters and helping students achieve their educational dreams.

By joining the Klubb, and becoming a recurring donor at the \$250, \$500 or \$1,000 annual level, you can help ensure the Foundation's continued ability to make a positive difference in the communities it serves. You can make a lasting impact through a recurring contribution to our Scholarship, Grant or Humanitarian funds.

The message you send with a Legacy Gift is one heard for generations to come, furthering the Sons of Norway Foundation's mission of "awarding grants and scholarships to promote the heritage and culture of Norway, and to provide assistance to our members, lodges and their communities." In fact, the impact you create with your gift of \$5,000 or more for the Sons of Norway Foundation may be much greater than you think.

Legacy Gifts- Getting Started

When considering charitable giving, you should start by consulting your financial planner and an attorney who specializes in estate planning. They'll help you determine which gift techniques are best for you. We're happy to work with you and your legal and financial advisors to help you accomplish your planned giving goals. Feel free to contact the Sons of Norway Foundation Director at foundation@sofn.com to learn more about the variety of ways to plan a future gift:

- **Gifts by Will, Revocable Trust or Beneficiary Designation:** A testamentary bequest may be designated for general support, permanent scholarship, or for another purpose. Many friends prefer that their bequest be used to meet the Foundation's greatest needs at the time the gift is realized. Some individuals designate the Foundation as the primary beneficiary of their estate, or name the Sons of Norway Foundation as a contingent beneficiary in the event that a loved one predeceases them. Others designate the Foundation as the beneficiary of a specific bequest from the estate.
- **Giving Life Insurance:** By making the Sons of Norway Foundation the owner and irrevocable beneficiary of an existing policy, you may take an immediate federal income tax deduction for approximately the cash value of the policy. The Foundation will immediately receive the dividends from the policy and will ultimately receive the insurance proceeds as well. Another option is to purchase a new policy and name Sons of Norway Foundation as the owner and irrevocable

beneficiary. You receive a charitable contribution deduction for all premium payments, and you can make a substantial contribution that otherwise may not have been possible. Speak with your Sons of Norway Financial Benefits Counselor for information that may assist you, and always consult with your tax advisor regarding the availability of the tax deductions.

- **Gifts by Charitable Trust:** A gift of cash, stock, or other property to the Foundation can provide a guaranteed lifetime income to you, your spouse, and if you wish, other beneficiaries. The trust may be set up to provide immediate income or can be invested to grow until a future date. Once the term of the annuity is complete, the remaining assets are added to the Foundation fund of your choice to help sustain the Foundation's ongoing mission. A Charitable Trust may also be established to provide payments to the Foundation for a term of years. After the completion of the term, the trust principal goes to your children, grandchildren, or others free of, or at greatly reduced, federal gift and estate tax. Please note that a Generation Skipping Tax [GST] is imposed on large transfers to grandchildren and others who are more than one generation younger than you.
- **Gifts of Real Estate:** If you own a home or other real estate that has appreciated in value and you would like to give a gift of substance to the Foundation, consider a life estate gift. This allows you to keep using the property, possibly get a current income-tax deduction, and remove all or part of the property value from your taxable estate. You may also consider outright gifts of real estate without the reservation of a life interest.
- **Gifts of Appreciated Stock:** Gifts of appreciated stock may be placed in any of our Foundation funds. Your gift qualifies for a tax deduction on the full market value of your stock; plus, you avoid capital gains tax that would otherwise arise from the sale of these stocks.
- **Gifts to a Designated Fund:** Another option is to establish a fund or scholarship. Currently you may designate your gift to any of the following sources: The Humanitarian Fund, The Heritage and Culture Fund, The King Olav V Norwegian-American Heritage Fund and the General Fund.

Making Your Gift

To designate your gift for a special purpose, please talk with the Director of the Sons of Norway Foundation by calling (800) 945-8851 or by email at foundation@sofn.com.

Video to show at meetings- found on the Foundation page of the website!

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The Sons of Norway Foundation was started to help fund community outreach, educational goals, humanitarian aid and cultural exchange. Watch the video to learn more.

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District Calendar of Events: (new items in red)

September 2017

- September 30- **Lodge liability premium due** to International SN office
- September 30 – Registration deadline for the District 5 President's Conference

October 2017

- October 20-22- District 5 Local Lodge President's Conference and District 5 Board Meeting
- Nominating Committee report due to Lodge

November 2017

- Elect Lodge Officers for coming year (unless you have two-year officer terms)

December 2017

- December 1 – SN Foundation **General Heritage and Culture** grants due
- December 15 –SN Foundation **Local Lodge Partnership and Helping Hands to Children** grants
- December 15- **D-63 Report of Elections** due. Send one copy to International Headquarters and one to District Secretary.

Note:

- **Check correspondence from the International and District and the International (www.sofn.com) and District (www.sonsofnorway5.com) websites for any updates and changes** Additional deadlines for the District 5 and International Conventions/Lodge Meetings will be added as those dates are established. Watch for future mailings and the District 5 website.
- The District 5 Convention will be June 27-July 1, 2018 at Hotel Radisson in La Crosse, Wisconsin.
- The International Sons of Norway Convention will be August 16-18, 2018 in Minneapolis, MN.

Compiled by Darlene Arneson, SN District 5 Secretary (arnesonfamily5@gmail.com or 608-873-7209)