

# **Widows Sons Masonic Riding Association of Florida**

## **New Chapter President, Secretary and Treasurer's Packet**

This guide provides the essential steps and tools to establish and operate a new chapter of the Widows Sons Masonic Riding Association of Florida effectively. It is designed to help Chapter Presidents, Secretaries, and Treasurers set up their organization with structure, transparency, and efficiency.

## **1. Register Your Chapter as a Non-Profit 501(c)(3)**

Register your chapter as a corporation on sun biz and mark it is a non-profit. The state is already a non-profit per the IRS and your chapter will operate under its 501(c)(3). You need a sunbiz corporation set up so you can open a bank account for your chapter and link Pay Pal and other payment methods to it. It makes it infinitely easier to accept donations and pay Chapter bills etc.

- Link to Sunbiz: <https://dos.myflorida.com/sunbiz/>

## **2. Open a Chapter Bank Account**

Once your chapter is registered, open a bank account in the chapter's name. Select a bank that offers Zelle or similar electronic transfer methods to make member dues and event payments easier.

## **3. Set Up Cloud Storage for Chapter Documents**

Create a dedicated cloud storage account for your chapter. Recommended platform: Google Drive. Store all bylaws, minutes, petitions, member lists, photos, and media assets here. Give shared access to all chapter officers to ensure operational continuity.

- Link to Google Drive: <https://drive.google.com>

## **4. Event Management & Communication System**

Use an event management tool to schedule stated communications and other activities, and send reminders via email. Recommended platform: eVite (free).

- Link to eVite: <https://www.evite.com>

## **5. Document Templates and Letterhead**

Establish a standard document format for chapter communications and record keeping. Use a WS-branded letterhead and footer. Suggested platform: Google Docs for easy sharing and real-time editing, eliminating the need for file uploads after each meeting.

- Link to Google Docs: <https://docs.google.com>

## **6. Membership Petitions**

Always keep blank membership petition forms on hand for prospective members. These should be easily accessible in your chapter's cloud storage and physically during events and meetings.

## **7. Maintain a Member Directory**

Maintain a secure and up-to-date list of all members, including their names, road names, email addresses, phone numbers, and mailing addresses. Recommended platform: Google Sheets for collaborative editing.

- Link to Google Sheets: <https://sheets.google.com>

## **8. Virtual Meeting Access**

Provide a virtual option for members who cannot attend meetings in person. Recommended platform: Zoom, which offers free plans with a 40-minute cap per session.

- Link to Zoom: <https://zoom.us>

## **Attachments**

Included in this packet:

- Membership Petition Form (PDF)
- Chapter Minutes Template (DOCX)

These templates are to be duplicated and customized with your Chapter's name and information.

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For questions or assistance, contact the State Secretary.