



INSPECTORS RETREAT 2025



The Simple Guide to Alcohol & Fundraising

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These are complex topics!

On a complexity scale of 0 to 10:

Alcohol 4

Fundraising and expenditures 9





- 1. Be fully familiar with the relevant parts of the C.M.C.
- 2. Be aware of some tax and state law regulations (when the general public is invited to our events)
- 3. Have your Lodges present a detail written plan
- 4. Review the Lodge's plan closely
- 5. Consult with your A.G.L., if necessary
- 6. Consult with the Grand Treasurer, if necessary
- 7. You may have to ask Grand Master's approval
- (follow the chain the communication)



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- Have your Lodges present a detail written plan.
- Ask your Lodges to go through these questions as they plan their event.
 - Where is the location of the event?
 - Who is invited (Masons, their family and friends and the general public)?
 - What is the primary purpose of the event?
 - Is there a plan to raise funds? What is that plan?
 - Is there a plan to support a charity? Is it a Masonic charity?
 - Is there a plan to financially support the Lodge?
 - Is there a plan to purchase or do something for the Lodge or the Hall?
 - How will the event be announced or advertised?
 - Is alcohol going to be sold or served? How will the alcohol be sold or served?
 - Where will the alcohol come from?
 - Will any prize or gift (money or otherwise) be given out?
 - What funds will be used to cover such prizes or gifts?
 - Is there a charge or the event is free?
 - Will Lodge funds be used at all?
 - What exactly will the entrance fee or the admission ticket cover?



Have your Lodges present a detail
written plan.

When they present you with a detail
written plan, ask them to cite or refer
to the relevant C.M.C. sections.

Presentation

(relevant sections and parts of the C.M.C.)

Relevant Chapters and Articles (applicable to Masonic Lodges)

Part 8. Constituent Lodges

Chapter 9. Financial Matters (§809.000)

Article 1 – Lodge Assets and Investments (§809.110 et seq.)

Article 2 – Permitted Lodge Financial Support (§809.210 et seq.)

Article 3 – Lodge Dues (§809.310 et seq.)

Article 4 – Contributions and Other Financial Assistance (§809.400)

Article 5 – Lodge Expenditures (§809.510 et seq.)

Chapter 11. Restricted or Prohibited Activities (§811.010 et seq.)



C.M.C. Sections that we must know well!

§809.210. PERMITTED FINANCIAL SUPPORT

§809.220. ADDITIONAL FINANCIAL SUPPORT

§809.230. ADDITIONAL FINANCIAL SUPPORT FOR CHARITABLE ACTIVITIES

§809.400. CONTRIBUTIONS AND OTHER FINANCIAL ASSISTANCE

§809.520. EXPENDITURES

§809.530. PROHIBITED EXPENDITURES

§809.540. REQUIRED EXPENDITURES

§809.550. DISCRETIONARY EXPENDITURES

§809.560. SOCIAL AND FRATERNAL EXPENDITURES

§811.010. ALCOHOLIC BEVERAGES

§811.020. FINANCIAL AID SOLICITATION

§811.030. FRAUDULENT OR ILLEGAL VENTURES

§811.040. GAMBLING

§811.050. BINGO AND BUNCO



Relevant Sections
(applicable to Masonic Hall Associations)

Part 9 . Masonic Hall Associations

§900.020. OPERATIONS.

§900.030. ALCOHOLIC BEVERAGES.



Relevant Sections
(applicable to Masonic Organizations)

Part 12 . Masonic Organizations

§1200.025. FRAUDULENT OR ILLEGAL VENTURES.

§1200.030. PERMITTED FINANCIAL SUPPORT.

§1200.035. ADDITIONAL FINANCIAL SUPPORT.

§1200.040. ADDITIONAL FINANCIAL SUPPORT FOR CHARITABLE ACTIVITIES.

§1200.045. ALCOHOLIC BEVERAGES.

§1200.050. GAMBLING.

§1200.055. BINGO AND BUNCO.



In addition to the C.M.C. Sections, we must also know the following:

Interpretation of Sections 811.010, 900.030 and 1200.045 of the California Masonic Code.

Guidelines for Use of Alcoholic Beverages by Masonic Lodges and Masonic Organizations
(1995 G.M. Recommendation No. 5, as revised by 2009 G.M. Decision No. 1)

Interpretation of Sections 811.040 and 1200.050 of the California Masonic Code.

Advertising for Gambling Establishments in Masonic Publications
(1996 G.M. Decision No. 3)

Interpretation of Sections 809.220 and 1200.035 of the California Masonic Code.

Guidelines for Advertising in Masonic Publications
(1993 G.M. Decision No. 5)
(as modified by 1996 G.M. Decision No. 3 and Recommendation No. 1)



Discussion

(consider and analyze different scenarios)

Scenarios!

1. Clearly permissible
2. Permissible but we may still choose not to do
3. Difficult and unclear (more information is needed to decide)
4. Clearly not permissible



DISCLAIMER!

The following scenarios or vignettes are **not** intended to suggest, illustrate or present any approved form of event, activity or venture.

These are simply examples where we can practice the application of the C.M.C. rules and standards.

Scenario 1

The Lodge plans to pay for Life Membership of the Senior Deacon. He is a Past Master of the Lodge and has faithfully served the Lodge for several years.

At the stated meeting, a motion is brought and is passed unanimously.

Scenario 2

One of the Brothers is a professional bartender working at a major hotel chain and has a certificate from a national bartenders' association.

At the Lodge Installation, the Lodge is planning to ask the Brother to manage and run the bar where wine and beer will be sold.

Scenario 3

A Brother donates 10 brand new iPads to the Lodge.

At the next stated meeting dinner, all guests (Masons and their family members) receive a ticket with a number. The Lodge does not charge anyone for the stated meeting dinner.

At the conclusion of the dinner, numbers are drawn, and 10 guests receive an iPad.

Scenario 4

A Brother owns a winery and donates 10 bottles of wine to the Lodge.

At the next stated meeting dinner, all guests (Masons and their family members) receive a ticket with a number. The Lodge does not charge anyone for the stated meeting dinner.

At the conclusion of the dinner, numbers are drawn, and 10 guests receive a bottle of wine.

Scenario 5

The Lodge is celebrating its 125th Anniversary. A licensed caterer will serve dinner and wine after the ceremony.

As the number of the guest exceeds the number of seats in the dining room, the Lodge plans to hold the dinner in the Lodge room.

Scenario 6

The Lodge has an Anniversary event. A licensed caterer provides alcohol, and all C.M.C. rules are being followed.

Two hours into the event, the Lodge Master realizes that some Brothers have consumed too much alcohol. The Master orders the caterer to stop serving alcohol.

Scenario 7

A Lodge always serves wine at its dinners and events. The wine is donated by one Brother, and the C.M.C. rules are followed.

The Lodge has a new banner that faces the street. The banner says:

“Freemasons: a fraternity of Brothers, who serve the community, support the local schools, frequently enjoy delicious food and wine together, and proudly support our veterans.”

Scenario 8

In its dining room, the Lodge has a built-in bar with locked cabinets where alcohol may be safely secured.

The Hall Association plans to apply for a liquor license so it can sell and serve alcohol during events such as Installation and Hiram Award dinners.

Scenario 9

The Master presents his budget at the January state meeting. One of the budget items is \$1,500 to cover the Lodge picnic which is held every year. All members approve, and the budget is passed.

At the June stated meeting, the Master declares that since the budget has been approved, the secretary should issue a check for \$1,500 for the Junior Warden to purchase all that is needed for the picnic. The Master states that no further vote is needed to approve the payment of \$1,500.

Scenario 10

At a Lodge dinner event, a liquor table is set in the dining room. The drinks were all donated by one Brother who is managing the table and is serving the drinks. The Junior Warden places a jar on the liquor table where the guests may tip. The collected tips will be placed in the Lodge's bank account.

Scenario 11

A Brother attends the stated meeting. As the members come to the Lodge room, and before the Lodge is opened, the Brother distributes a flyer asking the members to make a donation to a local church.

The church building is in a bad condition and is seeking donations from the community for much needed repairs.

Scenario 12

A Lodge places a large sign in front of its building (following all the rules and regulations of the local government regarding signage and advertisement).

The sign includes a QR code and asks the general public to donate to the Lodge.
The sign says:

“Your donations may go to a charity.”

Scenario 13

A Lodge places a large sign in front of its building (following all the rules and regulations of the local government regarding signage and advertisement).

The sign includes a QR code and asks the general public to donate to the Lodge.
The sign says:

“All donations will go the Shriners Hospital.”

Scenario 14

The Lodge sets up a bowling tournament. Participants pay \$125 to join.

The winner will receive \$1,000. After covering the expenses for lunch, the remainder of the collected money will be put in the Lodge's main bank account.

Scenario 15

The Lodge sets up a bowling tournament. Participants pay \$125 to join.

The winner will receive \$1,000. After covering the expenses for lunch and beer, the remainder of the collected money will be put in the Lodge's main bank account.

Scenario 16

Some members of the Lodge gather at the Master's house to participate in a poker tournament. This was not arranged or sponsored by the Lodge.

Each member contributes \$100. One Brother wins the tournament.

At the next stated meeting, the Brother who won the tournament reports about the gathering and the poker tournament and donates his entire winnings to the Lodge.

Scenario 17

Some members of the Lodge gather at the Master's house to participate in a poker tournament. This was not arranged or sponsored by the Lodge.

Each member contributes \$100. One Brother wins the tournament.

The Brother who won the tournament donates his entire winnings to a Masonic charity without mentioning anything about the poker tournament.

Scenario 18

A Lodge schedules a golf tournament. Each participant pays \$100 to join.

At the end of the tournament, and after deducting the expenses, a profit of \$3,000 is realized.

The Lodge plans to donate that money to a recognized Masonic charity.

Scenario 19

A Lodge schedules a golf tournament. Each participant pays \$100 to join.

At the end of the tournament, and after deducting the expenses, a profit of \$3,000 is realized.

The Lodge plans to transfer the money to the Hall Association, so that it can purchase a new refrigerator for the Lodge kitchen.

Scenario 20

A Lodge regularly holds a dinner-dance event every November.

This year, to increase its profits, the Lodge wants to advertise the event in a local newspaper to invite more guests and the general public. The title of the advertisement will say:

“Come, dance with the Masons!”

Scenario 21

The Lodge owns several structures in a large shopping center. A company wants to rent one of the Lodge's structures and plans to open a wine tasting facility in that structure.

Scenario 22

At the conclusion of an Installation dinner, a few bottles of wine are left. The Brothers are tired and decide to return the next morning to clean the dining room. The Master places the bottles of wine in a secure closet and locks it.

Scenario 23

One of the Lodge members who lives in Nevada attends the stated meeting and wants to make an announcement about a special poker tournament, which will be held in Las Vegas and sponsored by one of the local casinos.

A portion of the proceeds from the tournament will go to Shriners Hospitals nationwide.

Scenario 24

A Brother owns a liquor store. He wants to purchase a page in the Lodge's Trestleboard advertising his business.

Scenario 25

A Brother owns a cigar shop. He wants to purchase a page in the Lodge's Trestleboard advertising his business.

Scenario 26

A Brother is invited by his friends (who are not Masons) to attend a poker tournament at a local casino. The tournament is not related to any Masonic Lodge.

The Brother knows that his friends always take group pictures and post them on social media.

The Brother plans to wear his Lodge polo shirt (that has a large square and compass embroidery) when attending the tournament.

Scenario 27

A Brother has donated several bottles of wine for the stated meeting dinner.

After the dinner is concluded, and the members retire to the Lodge room for the stated meeting, the bottles are left in the dining room (which is a separate and apart from the Lodge room).

As the stated meeting takes longer than expected, the Master announces a break. The lodge is properly called from labor to refreshment.

During the refreshment, some Brothers go to the dining room and consume wine.

Scenario 28

A Lodge is scheduling a backgammon tournament.

Participants will pay \$25 each.

The proceeds will be donated to a Masonic charity.

Scenario 29

A Lodge is scheduling a chess competition.

Participants will pay \$25 each.

The proceeds will be donated to a Masonic charity.

Scenario 30

A Lodge holds an annual picnic every year regularly and charges \$20 for each guest.

A part of the admission fee will be used to purchase 10 wallets with a Masonic logo.

Towards the end of the picnic, numbers will be drawn, and 10 guests will receive a wallet.

Scenario 31

A Lodge holds an annual picnic every year regularly and charges \$20 for each guest.

Using the Lodge general funds, the Lodge had purchased 10 wallets with a Masonic logo last year.

Towards the end of the picnic, numbers will be drawn, and 10 guests will receive a wallet.

Scenario 32

A member of the Lodge dies and wills \$500,000 to the Lodge. The Lodge receives the money.

Months later, it is discovered that the member who made the \$500,000 gift in his will was engaged in illegal activities and had made a fortune from such activities.

Scenario 33

A Lodge wants to participate in a local community fair by renting and operating a booth to sell Masonic literature, Masonic badges and pins to those attending or participating in the fair.

Scenario 34

A Lodge plans a dinner event. Guests pay \$30 which will cover the dinner and non-alcoholic beverages.

The Lodge plans to ask the members to donate cigars which will be auctioned after the dinner.

The Lodge will not pay for the cigars but will keep the proceeds of the auction.

Scenario 35

A Lodge plans a dinner event. Guests pay \$30 which will cover the dinner and non-alcoholic beverages.

The Lodge plans to ask the members to donate bottles of wine which will be auctioned after the dinner.

The Lodge will not pay for the bottles of wine but will keep the proceeds of the auction.

Scenario 36

To increase public awareness, a Lodge regularly holds a picnic in a city park inviting Masons and non-Masons. Alcohol is not served.

Anyone can attend, and the event is free.

Scenario 37

A Lodge allows its members to advertise in the Lodge Trestleboard. All C.M.C. regulations are followed as to the contents of the advertisements.

At the end of the year, after calculating the expenses for publishing, printing and distributing the Trestleboard, it appears that \$1,000 profit was made from the Trestleboard advertisements.

The Lodge plans to use that profit for its next year's fraternal and social activities.

Scenario 38

Brothers meet at the Lodge dining room to watch the Superbowl together.

Food and drinks are free, but each guest donates 50 dollars. At the end of the game, the Lodge donates the collected money to the Masonic Homes.

Scenario 39

Brothers meet at the Lodge dining room to watch the Superbowl together. Each guest donates 50 dollars and picks one of the two teams.

Half of the money collected from the brothers is spend on food. The other half will be distributed evenly between those who picked the winning team.

Scenario 40

A cigar vendor rents a table during a social outdoor event scheduled by a Lodge. Guests may approach the table and purchase cigars, lighters, or humidors.

The Lodge will get a set amount of money as rental fee, regardless of the income generated by the cigar vendor.

Scenario 41

A cigar vendor rents a table during a social outdoor event scheduled by a Lodge. Guests may approach the table and purchase cigars, lighters, or humidors.

The Lodge will get a set amount of money as rental fee, regardless of the income generated by the cigar vendor.

In addition to selling cigars, the vendor will also arrange for a raffle. Participants will pay \$10, and at the end, numbers will be drawn, and some guests will win gifts.

Scenario 42

A cigar vendor rents a table during a social outdoor event scheduled by a Lodge. Guests may approach the table and purchase cigars, lighters, or humidors. The vendor will pay the Lodge 25% of its sale proceeds.

Scenario 43

A member of the Lodge is an accountant and provides accounting services to a local casino which operates legally under the laws of California.

The casino wants to purchase a page in the Lodge Trestleboard to advertise.

The image features a 3D orange question mark as the central focus, positioned slightly to the right of the center. It is surrounded by a dense field of dark grey, three-dimensional dollar signs (\$). The background is dark and textured, with several prominent white, brush-like strokes that sweep across the scene, adding a sense of movement and artistic flair. The lighting creates highlights and shadows on the 3D objects, giving them a tangible, metallic appearance.

Questions?



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