

# Al-Anon Family Groups of Massachusetts

## Bequests from Al-Anon Members

### 5/21/2022

#### For Approval of Assembly:

Principles

Policy

#### Informational:

Example of bequest

Overview of Excess Funds Process

# Al-Anon Family Groups of Massachusetts

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Proposed policy 5/21/2022. Moved forward by Steering Committee 3/20/2022 and approved by the AWSC 4/3/22. To be approved by 2022 Spring Assembly. Procedures to be further developed following the Assembly.

### *PRINCIPLES*

1. Policies of AFG of MA will be based on the Al-Anon/Alateen Service Manual. (Article III of the By-Laws)]
2. By-Laws of Al-Anon Family Groups of Massachusetts, Inc [as revised Nov 3, 1990] Article IX. Finance, Section 5. Individual Contributions/Bequests. " Individual contributions and bequests to AFG of MA, Inc. are accepted as defined for the WSO in the Al-Anon/Alateen Service Manual at the time the contribution is received." (note: this Policy was created based on 2018-2021 version two pgs 103-104)
3. Tradition Four "Each group should be autonomous, except in matters affecting another group or Al-Anon or AA as a whole."
4. Tradition Six "Our Family Groups ought never endorse, finance or lend our name to any outside enterprise, lest problems of money, property and prestige divert us from our primary spiritual aim. Although a separate entity, we should always co-operate with Alcoholics Anonymous."
5. Tradition Seven "Every group ought to be fully self-supporting, declining outside contributions."
6. Tradition Twelve "Anonymity is the spiritual foundation of all our Traditions, ever reminding us to place principles above personalities."
7. Concept One " The ultimate responsibility and authority for Al-Anon world services belongs to the Al-Anon groups."
8. Warranty One "Sufficient operating funds, including an ample reserve, should be its prudent financial principle."

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### ***POLICY***

1. AFG of MA may accept a one-time bequest from an Al-Anon member's estate or trust in any amount.
2. Bequest amounts, up to 10% of the total revenue of AFG of MA General fund as identified in the previous year's MA Tax Return, will be placed in the operating account .
3. Any excess amount (above the 10% as described above) will be held in a separate account and reported on monthly.
4. Expenditures from this account will be authorized by the Assembly via approval of the Annual budget or approval of a specific project, and monitored by the Steering Committee.
5. Excess amounts are not available for general purposes, unless authorized by the Assembly.
6. There will be no public acknowledgment of the gift and the gift may not be earmarked for specific purposes by the donor.

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### *EXAMPLE using the bequest received on 10/7/2021*

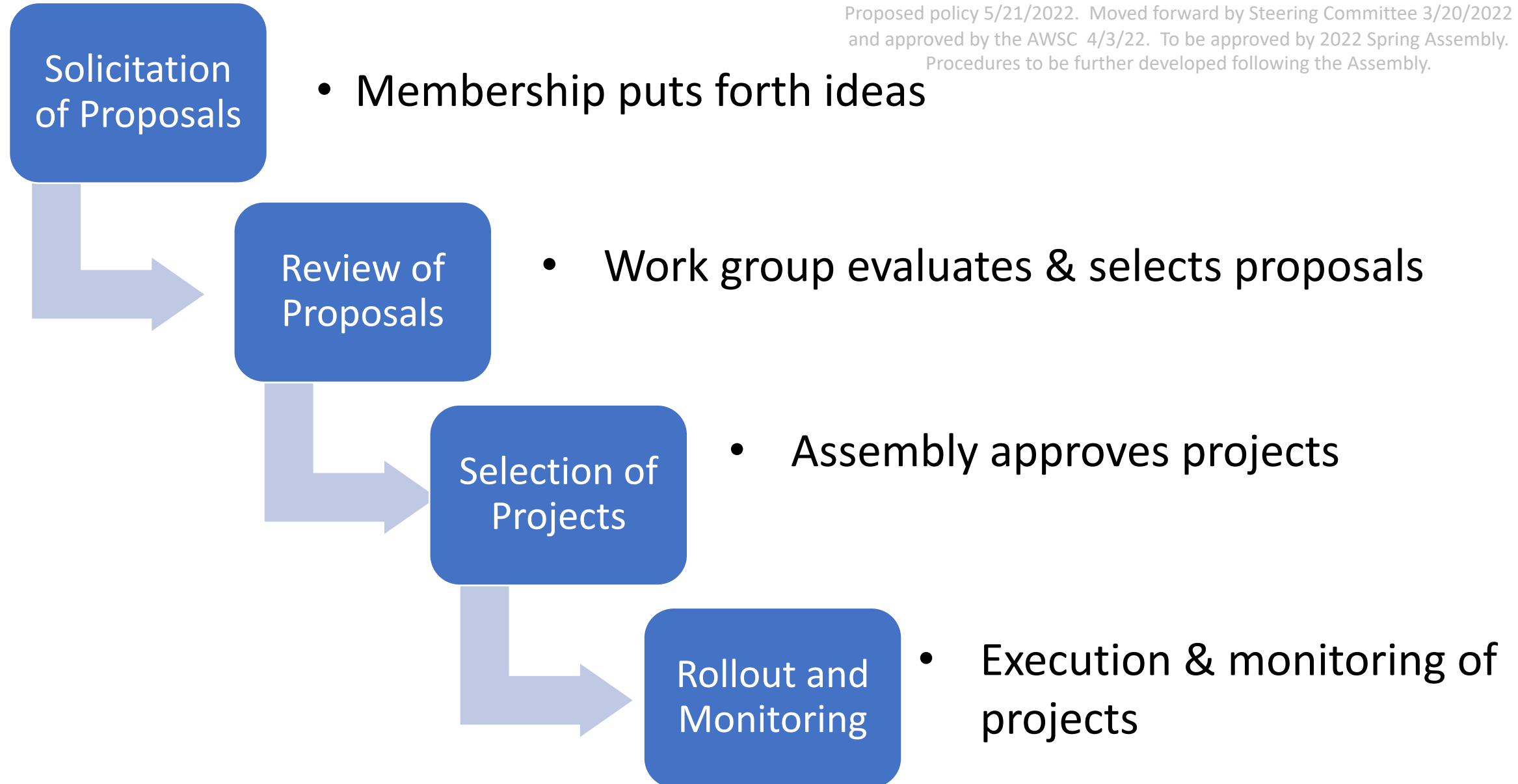
Bequest Amount:	\$85,841.85
2020 MA Tax Return, Gross Support & Revenue:	\$124,874
10% of MA Tax Return Revenue:	\$12,487
Amount to be placed in the operating account:	\$12,487 **
Excess funds from the bequest:	\$73,354
Funds subject to separate Assembly authorization:	\$73,354
Funds reported on separately:	\$73,354

\*\* All expenditures from the operating account are determined by the Annual Budget approved by the Assembly.

# SUMMARY OF EXCESS FUNDS PROCESS

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# **Al-Anon Family Groups of Massachusetts Bequests from Al-Anon Members**

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## **MOTION:**

**To accept the document “Bequests from Al-Anon members to Al-Anon Family Groups of Massachusetts, Inc. Principles and Policy” (as approved by Area Steering Committee on 3/20/22 and Area World Service Committee on 4/3/22). Process and procedures for implementation will be created by a Task Force chaired by the Area Treasurer for presentation at Fall Assembly 2022.**