

## THE FRIENDLY SOCIETIES ACT

REGULATIONS  
(under section 69)

## THE FRIENDLY SOCIETIES REGULATIONS, 1968

(Made by the Minister on the 17th day of July, 1968)

L.N. 289/68

[1st November, 1968.]

PART I. *Preliminary*

1. These Regulations may be cited as the Friendly Societies Regulations, 1968. Short title.

2. In these Regulations, unless the context otherwise requires— Interpreta-  
tion.  
 “the Act” means the Friendly Societies Act and includes these Regulations;  
 “the appointed day” means 1st November, 1968;  
 “auditor” means the person who audits the accounts of a registered society in accordance with section 23 of the Act,  
 and other expressions have the same meanings as in the Act.

PART II. *Matters to be provided for in the rules of a society*

3. The matters in respect of which every registered society shall make rules are the matters set out in the First Schedule. Matters  
for rules.  
First  
Schedule.

PART III. *Meetings*

4. Every society shall cause full and proper minutes of all proceedings of its general and special meetings and of all committee meetings to be entered in a book or books kept for the purpose. Minutes.

5. Notwithstanding anything in the rules of a society or branch to the contrary no meeting of any kind whatsoever shall take place or continue, and no subscriptions, levies or fines or other moneys shall be paid into the funds of a society or branch or to any officer thereof, between the hours of eleven o'clock in the night and six o'clock of the following morning. Hours of  
business.

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When  
notice of  
meetings  
unnecessary.

6. It shall not be necessary to give or serve notice of any general or regular meeting, the time or times for the holding of which are specifically stated in the rules of a society or branch, upon any member respectively thereof, anything to the contrary in the rules or constitution of the society or branch notwithstanding.

Notice  
of special  
meeting.

7. Notice of a special meeting of a society or branch shall be deemed to have been given or served upon every member of the society or branch if a notification thereof be stuck up in a conspicuous place in the registered office of the society or branch, as the case may be, for at least fourteen clear days previous to such special meeting, or in the alternative, if notice thereof be published once a week in a daily newspaper circulating in the Island during at least two consecutive weeks immediately prior to such special meeting, anything to the contrary in the rules or constitution of the society or branch notwithstanding.

Member  
having  
interest.

8. A member of the committee of the society or branch shall not vote or take part in any matter before the committee or general body of the society or branch in which he has directly or indirectly any interest.

#### PART IV. *Voting at Elections*

Form  
of voting.

9. At all meetings of a society or branch voting shall be by ballot or show of hands as required by the rules of the society or branch.

Multiple  
elections.

10.—(1) Not more than one office may be voted for at one time.  
(2) Officers shall not be elected *en bloc* save in the case of the election to office of the entire committee of management by acclamation, that is to say, without any dissentient vote or protest.

Proposing  
and  
seconding.

11. No member may propose or second more than one person for one office.

Who may  
not preside  
at election.

12. No member may preside at his own election or re-election to office.

Counting  
of votes.

13.—(1) Two or more tellers, as the case may require, shall be appointed by the chairman for the purpose of counting the votes.

(2) If the chairman thinks it necessary, votes may be counted in groups, that is to say, those supporting candidate A may be collected

into one group; those supporting candidate B may be collected in another group, and so on, with the formation of as many groups as there are candidates.

**14.** A member under the age of eighteen years shall not hold an elective office in a society or branch.

Age limit for elective office.

**15.** In the event of the failure of an election in respect of any office, those previously appointed shall continue in office pending the holding of a valid election as respects such office. Every officer shall remain in office until the installation of his successor.

Failure of election.

**16.** Where the rules of a society or branch are silent retiring members shall be eligible for re-election.

Re-election.

#### PART V. *Contribution Cards*

**17.** The committee of management of every society and branch shall issue to every member a contribution card, and it shall be the duty of the secretary to enter thereon from time to time all payments made by the member in respect of entrance fee, monthly or weekly contributions, as the case may be, anniversary subscription, levies, dues, fines, arrears and other payments made under the rules of the society or branch. Every entry shall be initialled by the secretary. Every card shall contain the necessary columns to provide for all the above entries from the 1st day of January to the 31st day of December in any one year. No card shall be issued to a member unless and until it is signed by the secretary and the chairman.

Contents of contribution cards.

**18.** Every contribution card whenever issued shall be returned to the secretary as soon as possible after the 31st day of December of the year of its issue but in no event later than the 31st day of January of the year following its issue, and no card for the following year shall be issued to a member until he shall have returned his card for the previous year or satisfactorily accounted for its loss. It shall be the duty of the secretary to furnish the committee of management with a list of those members who have failed to return their cards by the 31st of January as required hereunder and the committee of management of a society shall enquire into the reason or reasons for the failure of every member on the said list so to return his card, and may impose a fine not exceeding fifty cents on any member of the society who has failed so to return his card.

Return of contribution cards.

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Contribution cards, to be submitted for audit.

19. All contribution cards returned by members shall be kept by the secretary and submitted for audit along with the said list showing the action taken in each case by the committee of management as respects those members who have failed to return their cards as hereunder provided.

List of contributions, etc., for auditor.

20. It shall be the duty of the secretary of every society or branch to supply the auditor for the purposes of the annual audit with a certified list of the amount of contributions, dues, levies and fines in arrear as respects every individual member in respect of every particular fund for the year under review; and it shall be the duty of the auditor to check and verify the items therein appearing with the register of members and contribution cards of the society or branch.

#### PART VI. *Discipline*

Enforcement of discipline.

21. Every society and branch shall under its rules have full power and authority to enforce discipline among its members and obedience to its said rules and to expel or otherwise discipline its members: Provided that notwithstanding anything to the contrary contained in the rules of a society or branch a member shall be entitled to be fully informed of any charges against him, with the opportunity to be heard in his own defence, before he can lawfully be suspended or deprived of membership.

#### PART VII. *Accounts*

Accounts to be kept.

22.—(1) The committee of management of every society and branch shall cause proper books of account to be kept, including a blotter, cash books for both the secretary and the treasurer, a register of members, a record of benefits paid to members and a general ledger so arranged as to exhibit on one side all the sums at the debit of the account of each particular fund or benefit assured by the society and on the other all the same at the credit of each account.

(2) Proper vouchers shall be obtained for every payment.

Instructions for keeping accounts correctly.

23. If, at any time, it appears to the Registrar that the accounts of a society or branch are not kept in such a manner as to show correctly the state and condition of the society or branch as required under the Act the Registrar may nominate a person to give such instructions as will enable the officers of the society or branch to keep the accounts correctly thereafter and the cost thereof shall be borne by the society or branch.

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## THE FRIENDLY SOCIETIES REGULATIONS, 1968

7

24. If the Registrar, upon inquiry or other examination, or from the returns, or from the special report of an auditor, or upon other evidence, finds that the receipts and funds of a society or branch are insufficient to justify the continuance of the current expenses of management and administration or of any other expenses, or that the rates of salaries or other allowances paid to its officers and members are excessive, unfairly discriminatory, or otherwise unreasonable, he may call upon the society or branch to reduce the whole or any item thereof and may fix a limit therefor which shall in no case be exceeded until further direction from him.

Restriction  
of expenses.PART VIII. *Loan Fund*

25. The committee of management shall present yearly to the general body in general meeting a statement of accounts with respect to the operation of the society's loan fund, if any, showing the loans outstanding, deposits on hand, a report as to the instalments or repayments due and unpaid, the action proposed to be taken in each case and a general review of the operation of the said fund.

Account of  
loan fund.

26. Notwithstanding the functions or powers of any other committee under the rules of a society the committee of management shall satisfy itself that the provisions of the Act and all rules relating to the operation of a loan fund have been complied with, and shall consider whether there has been any alteration in the status of any borrower or his sureties, if any, which would justify special action being taken for the termination of any loan.

Control of  
loan fund.

27. If a loan be repayable by instalments the borrower shall be supplied with a card or book (for which he shall pay a sum not exceeding five cents) in which shall be recorded the amount and the terms of the loan and in which the instalments repaid shall be entered and initialled by the officer to whom the money is paid.

Loans  
repayable  
by instal-  
ments.

28. Except in the cases where the committee of management renews a promissory note at maturity so soon as the debt or moneys due in respect of any loan made from a loan fund become due and payable by a member to a society, the committee of management shall, except for good cause, forthwith take all reasonable and necessary steps to sue for recovery and receive such debt or moneys and all interest due thereon together with all legal, usual and customary costs, charges and expenses.

Recovery  
of moneys  
due in  
respect of  
loans.

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PART IX. *Audit*

List of documents to be supplied to auditor.

29. When any accounts of a society or branch are to be audited the secretary of the society or branch shall make out and deliver to the auditor a list in writing of all vouchers, receipts, invoices and other supporting documents and the books of the society or branch in which the accounts of the society or branch are kept.

Auditing.

30.—(1) The annual audit under the Act shall extend to the whole of the accounts of the society or branch.

(2) The auditor shall make himself acquainted so far as necessary for the purpose of the audit with the provisions of the Act, and with the rules of the particular society or branch, the accounts of which he is auditing.

(3) The auditor shall satisfy himself—

- (a) as to the accuracy and sufficiency of the books and accounts of the society or branch and that all transactions of the society or branch are correctly and adequately recorded therein;
- (b) that all payments made are duly vouched and have been authorized in the manner prescribed by the Act;
- (c) that so far as reasonably practicable all sums received and all payments made by the society or branch for the period have been brought to account;
- (d) that where separate contributions are paid to particular funds these have been stated separately and that any payments from the funds have been correctly charged thereto; and
- (e) that the accounts submitted to him for audit are drawn up in the form and disclose such particulars as are prescribed or required under the Act.

(4) Should there be errors in the annual return, or in the books, accounts, vouchers or other documents submitted to the auditor, the books, accounts, vouchers or other documents shall be returned (at the cost of the society) for correction or adjustment, unless the auditor be requested by the society to correct the inaccuracies, in which case he shall be entitled to claim a special fee to be arranged between him and the society, the amount, however, to be paid personally by the officer or officers respectively responsible for the particular error or errors, as the case may be. In the event of any dispute arising between the society and an auditor appointed by the Registrar relating to any matter or thing under this regulation either party shall be at

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## THE FRIENDLY SOCIETIES REGULATIONS, 1968

liberty to refer the same to the Registrar whose decision shall be final.

**31.** For the purpose of carrying into effect the provisions of the Act the auditor shall at every audit make such investigations as may be necessary.

Auditor must investigate.

**32.** Every auditor shall verify every annual balance sheet and shall either certify that it is correct and in accordance with the law, or specially report to the society or branch and the Registrar in what respect he finds it defective, incorrect, or not in accordance with the law.

Audit of balance sheets.

**33.** If a person appointed by the Registrar to audit the accounts of a society or branch finds that there has been any misapplication or wrongful withholding of the funds, moneys or property of the society or branch by any person or persons he shall submit to the Registrar a special report thereon.

Report on mis-application, etc., of funds.

**34.—(1)** Upon every audit of the accounts of a society or branch it shall be the auditor's duty to examine every entry in the books of the society or branch; and under no circumstances whatsoever may the accuracy of the said accounts be verified by test checks.

Auditor must examine all entries in books.

(2) It shall be the duty of the auditor to demand a voucher for every item of expenditure and in the case of sick, death and funeral benefits to compare the books of account with the contribution cards of those who received such benefits, and to satisfy himself that those who received such benefits were in good compliance or standing and entitled to be paid.

(3) The auditor shall also require to be produced a certificate of death where required by section 43 of the Act.

**35.** Where in the opinion of an auditor the annual return or balance sheet of a society or branch shows that the society or branch is not in a position to provide for the payment of its benefits at the rates in force without increase in its existing rates of contribution or that owing to depletion in membership, excessive mortality, sickness, epidemic, or other cause its funds are insufficient or are likely to be insufficient to provide in the future for the payment thereof, he shall specially report the same to the Registrar and in such report shall set out all material facts relating to its financial condition as in his opinion warrant alteration in its existing rates of contribution. The

Report on inadequate funds.

Registrar after consideration of the said report may call upon the society or branch to make within such time as he may fix, but not exceeding six months, such increase in its rates of contributions as will enable the society or branch to provide for the payment of its benefits at the rates in force, or alternatively such reduction in the benefits payable by the society or branch, as will permit and justify its continuance upon a sound and solvent basis.

Review of  
operation  
of a  
society.

36. The Registrar may appoint an actuary, auditor, accountant, or other qualified person to review for any period the operation of any society or branch proposing or intending to give benefits payable on the death of a member exceeding \$100, and make a report to him on the financial condition of the said society or branch and the adequacy or otherwise of the subscriptions received by such society or branch or of its funds to support the benefits or bonus moneys payable by the society or branch having regard to the obligations or liabilities of the said society or branch under its rules or any proposed rules, the cost of every such report to be borne and paid by the society or branch.

Auditor  
may make  
recommendations.

37. Every auditor shall, if he thinks fit, set out, in relation to the audit of the accounts of a society or branch, such requirements and recommendations as he may think desirable for the better operation of the society or branch or the better arrangement of its accounts, and in the discretion of the Registrar effect shall be given thereto by the committee of management within such time as may be directed by him.

#### PART X. *Levies*

Principles  
governing  
determination  
of levy.

38. It shall be the duty of the committee of management in determining a levy authorized by the rules of a society or branch to exercise a reasonable and honest discretion in estimating the amount that such levy may be expected to realize. The committee shall not make a larger or heavier levy than that which shall reasonably suffice to satisfy the purpose for which such levy may lawfully be made.

Record of  
levies.

39. A book shall be kept for the purpose of recording all levies imposed upon members by a society or branch during each year, and of the estimated results of such levies, and of the reason for each such levy, and of the purposes for which the moneys arising thereby have been applied.

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40. Notwithstanding anything to the contrary contained in the rules of a society or branch, the society or branch shall not, save with the written consent of the Registrar, impose a levy or levies which shall exceed in the aggregate, in relation to a building fund the sum of \$2 or in relation to a banner fund the sum of 40c, respectively, payable by any member of the society or branch, in any one year.

Maximum  
levy for  
certain  
funds.

#### PART XI. Bonds

41.—(1) In all cases where under the rules of a society or branch a bond is required to be given by a treasurer, the bond shall, except where the Registrar otherwise orders, be given in an amount not less than double the amount of money to be placed in the possession or control of the treasurer and with at least one surety in a like sum.

Minimum  
amount  
of bonds.

(2) In no case under the rules of a society or branch may the bond required to be given by any other officer having receipt or charge of money be less than one-half of the amount required from the treasurer, with at least one surety in a like sum.

(3) In all cases under the rules of a society or branch the bond required to be given by a trustee shall, except where the Registrar otherwise orders, be in a sum not less than \$100 with at least one surety in a like sum.

42. Bonds shall be attested by a Justice of the Peace who shall take care (as far as possible) that the sureties to bonds are responsible persons. Sureties to bonds must testify. Every bond shall upon execution be filed in the office of the Registrar without the payment of any fee.

Attestation  
and filing  
of bonds.

43. A bond may be continuing to the extent that an officer re-elected to the said office in a society or branch for a consecutive term or terms need not furnish a fresh bond, and the surety thereto may therein undertake to become bound, without further attestation, in respect of any such consecutive term or terms of office to be held by the principal in the society or branch. The committee of management of every society or branch shall at least once in every year verify the existence of the sureties to bonds furnished by officers.

Continuing  
bond.

#### PART XII. Reduction of Benefits

44. In the event of any epidemic, excessive sickness, emergency or other unforeseen contingency impairing the funds of a society or

When  
benefits may  
be reduced.

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branch the committee of management of the society or branch may by a resolution of the majority of its members reduce the benefits payable or afforded under its rules or impose a special levy or levies upon the members of the society or branch and such reduction of benefits or special levy or levies shall be binding on the members of the society or branch notwithstanding anything to the contrary contained in the provisions of its rules or constitution.

Procedure  
after  
resolution  
to reduce  
benefits.

45. Where the committee of management of a society or branch shall determine by resolution to reduce the amount payable in respect of any benefit under its rules on the grounds of epidemic, excessive sickness, emergency or for other good cause, a copy of every such resolution signed by the secretary and countersigned by the president or chief executive officer of the society or branch shall be sent to the Registrar and until that copy is so sent and an acknowledgement received therefor the resolution shall not take effect. The committee of management shall also cause a notification of every such reduction of benefit to be posted in a conspicuous place in the registered office of the society or branch for a period of not less than two months or to be mentioned during at least four consecutive general meetings of the society or branch, whichever is the less.

#### PART XIII. Pensioners

Declaring  
a person  
to be a  
pensioner.

46. No society or branch shall save by the permission of a majority of the members present and entitled to vote in general meeting declare any person to be a pensioner on its funds. At least fourteen days' notice of such meeting and intending resolution shall be given to such person. Every pensioner shall be provided without charge with a card or document signed by the secretary and countersigned by the president containing the name and registered number of the society or branch, the name, age and address of the person declared to be a pensioner, the reason for such declaration and the date from which such person is declared to be a pensioner as aforesaid.

List of  
pensioners.

47. Every society or branch shall keep and maintain in a book (to be known as the List of Pensioners) a list of the pensioners upon its funds, and the secretary shall immediately duly record therein the particulars herein required of every person declared to be a pensioner of the society or branch. Every such list shall contain the name, age, address, and reason for the declaration of pensionable status in respect of every person recorded therein and shall be open to inspection at all reasonable times by members of the society or branch without fee.

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48. Nothing herein shall prevent a member who has become a pensioner of a society or branch from being by majority vote of the members present and entitled to vote at a general meeting of the society or branch taken off the List of Pensioners and from regaining his previous status as an ordinary member subject to such terms and conditions as the society or branch may impose. A note to such effect shall, however, be made by the secretary in the List of Pensioners against the name of every pensioner who has regained his status as an ordinary member and the date thereof.

Removal  
from List  
of Pensioners.

49. Notwithstanding anything to the contrary contained in the rules or constitution of a society or branch every pensioner respectively thereof, who has against his will been restored to the status of an ordinary member with the duties and obligations attendant thereon as required under the rules of the society or branch, shall be entitled to apply to the Registrar who may if he considers the said restoration to be unfair or inequitable in the circumstances of the case order him to be retained as a pensioner of the society or branch or make such other order as the justice of the case may require.

Pensioner  
may appeal  
to Registrar.

#### PART XIV. *General and Miscellaneous*

50. The committee of management of every society and branch shall have the right, and every member of every such society and branch shall afford to the committee of management of the society or branch, an opportunity to examine, through its medical, detail or optical officer, as the case may be, the person of the said member when and as often as it may reasonably require while a claim for benefits is pending or within a reasonable time thereafter notwithstanding any provisions contained in the rules or constitution of the society or branch to the contrary.

Medical  
examination  
of members  
making  
claims.

51.—(1) The Tribunal for hearing appeals under subsection (4) of section 8, subsection (4) of section 11, subsection (2) of section 17, subsection (3) of section 56 and subsection (2) of section 58 of the Act shall consist of a chairman (who shall be either a barrister-at-law or a member of the Jamaica Bar or a solicitor of the Supreme Court of Jamaica) and two other persons, all of whom shall be appointed by the Minister for such term as the Minister shall specify.

Appeal  
Tribunal.

(2) Every appeal to the Tribunal shall be in the form of a written memorandum which shall set out concisely the grounds and reasons of the appeal.

(3) Subject to the provisions of the Act, the procedure for the consideration and determination of appeals to the Tribunal shall be such as the chairman shall determine.

Appointment  
of  
arbitrators.

**52.** Every arbitrator to whom a reference is made under section 46 of the Act shall be a person selected by all parties to the dispute or, where they cannot agree, appointed by the Registrar.

Reference to  
arbitration.

**53.—(1)** Where in pursuance of section 46 of the Act the Registrar refers a dispute to arbitration, such reference shall be embodied in an order of reference under his hand.

(2) Every order of reference under this regulation shall—

- (a) specify the name, surname, place of abode and occupation of the arbitrator or arbitrators;
- (b) set out the dispute and full particulars thereof; and
- (c) limit the time within which the award shall be forwarded by the arbitrator or arbitrators to the Registrar.

Proceedings  
in arbitra-  
tion.

**54.—(1)** The proceedings before the arbitrator or arbitrators shall as nearly as possible be conducted in the same way as proceedings before a court of law and in particular the following provisions shall have effect in respect thereof—

- (a) notice of the time and place at which the proceedings are to be held shall be given to the parties to the dispute and such notice shall be a ten days' notice;
- (b) a record of the evidence adduced before the arbitrator or arbitrators shall be made, dated and signed by the arbitrator or arbitrators;
- (c) documents produced as exhibits before the arbitrator or arbitrators shall be marked, dated and initialled by the arbitrator or arbitrators and shall be attached to the file of the proceedings; and
- (d) in the absence of any party duly notified to attend, the dispute may be decided by the arbitrator or arbitrators *ex parte*.

(2) The award of the arbitrator or arbitrators shall—

- (a) be in writing;
- (b) be dated and signed by the arbitrator or arbitrators; and
- (c) state the amount of the costs and expenses of the arbitration.

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if any, and by which party or parties to the dispute the same are to be paid.

(3) Upon the completion of the proceedings the arbitrator or arbitrators shall forward to the Registrar—

- (a) the file of the proceedings; and
- (b) the award,

and the Registrar shall send a copy of the award to each party to the dispute.

(4) Subject to the provisions of these Regulations any dispute referred to arbitration pursuant to section 46 of the Act shall be determined in the manner provided by the Arbitration Act.

**55.**—(1) The period within which an appeal to the Registrar under subsection (3) of section 46 of the Act may be made is one month from the receipt by the appellant of the copy of the award or such further period as the Registrar may in any case allow.

Appeal to Registrar.

(2) Every such appeal shall be in the form of a written memorandum which shall set out concisely the grounds and reasons of the appeal.

**56.**—(1) The Registrar shall, for the purposes of the Act, keep or cause to be kept in his office a register of societies to which the Act applies.

Register.

(2) Such register shall be open to inspection by the public while the office of the Registrar is open.

(3) For the purposes of section 20 of the Act, registration of the office of a registered society or branch shall be effected by the inclusion of the address thereof in the register kept by the Registrar made in pursuance of an application therefor by the society or branch.

**57.** For the purposes of section 26 of the Act, the prescribed persons, are the valuer and the actuary.

Provision relating to section 26 of Act.

**58.** The fees set out in the right hand column of the Second Schedule shall be payable in respect of the matters set out opposite thereto in the left hand column thereof.

Fees. Second Schedule.

**59.**—(1) The forms contained in the Third Schedule are hereby prescribed for the purposes of the Act.

Forms. Third Schedule.

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(2) Every such form may from time to time be modified by the Registrar or replaced by a form approved by him.

## FIRST SCHEDULE

(Regulation 3)

*Matters to be Provided for by the Rules of Registered Societies*

1. The name and place of office of the society.
2. (a) The whole of the objects for which the society is to be established.  
(b) The purpose for which the funds thereof shall be applicable.  
(c) The terms of admission of members.  
(d) The conditions under which any member may become entitled to any benefit assured thereby, and the contributions payable by each member.  
(e) The fines and forfeitures to be imposed on any member.  
(f) The consequences of non-payment of any subscription, levy or fine.  
(g) The suspension and expulsion of members.
3. The mode of holding meetings, the quorum, the right of voting and the manner of voting, and the manner of making, altering, or rescinding rules.
4. (a) The appointment and removal of a committee of management (by whatever name), of a secretary, a treasurer, and other officers (if any).  
(b) The remuneration (including salary) payable to the members of the committee of management, to the secretary, the treasurer, and other officers.
5. In the case of a society with branches, the composition and powers of the central body, and the conditions under which a branch may secede from the society.
6. The duties and obligations of officers having receipt or charge of money of a society or branch and the keeping of the accounts.
7. The officers who have power to sign cheques and other documents on behalf of the society.
8. The inspection of the books of the society by every person having an interest in the funds of the society.
9. In case of dividing societies, a provision for meeting all claims upon the society existing at the time of division before any such division takes place.
10. The keeping of separate accounts of all moneys received or paid on account of every particular fund or benefit assured for which a separate table of contributions payable has been adopted, and the keeping of separate accounts of the expenses of management, and of all contributions on account thereof.
11. The voluntary dissolution of the society by consent of not less than three-fourths in value of the members, and of every person for the time being entitled to any benefit from the funds of the society, unless his claim be first satisfied or adequately provided for.

## SECOND SCHEDULE

(Regulation 58)

*Fees*

To be paid to a registered society	...	...	25c where rules consist
or branch for supplying a copy			of not more than 10
of its rules			pages;
	...	...	40c in other cases.

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THE FRIENDLY SOCIETIES REGULATIONS, 1968

- (a) a list of all the branches, and notice of the place where the registered office of each branch will be situated;
- (b) if the rules of all the branches (in this Act called branch rules) are or are intended to be identical, a statement to that effect and four copies of those rules; and
- (c) if the branch rules are not or are not intended to be identical, a statement to that effect and four copies of the rules of each branch.

(2) A society having a fund under the control of a central body to which every branch is bound to contribute may be registered as a single society."

FORM 2

Certificate of Registration

Name of Society:.....

Register No:.....

The society described above is registered this.....  
day of.....19..... as a\*.....  
society under the Friendly Societies Act.

.....  
*Registrar*

\*Insert friendly, or benevolent, or specially authorized, as the case may require.

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**THE FRIENDLY SOCIETIES REGULATIONS, 1968**

**FORM 3**

**GENERAL STATEMENT OF THE FUNDS AND EFFECTS OF THE SOCIETY TOGETHER WITH AN ACCOUNT OF THE RECEIPTS AND EXPENDITURE FOR THE YEAR ENDED 31ST DECEMBER, 19...**

Name of Society: .....

No. of Registration: .....

Place of Business: .....

Receipts	\$	c	Expenditure	\$	c
Entrance Fees .. ..			Sick Benefits .. ..		
Contributions .. ..			Funeral Grants .. ..		
Donations for Charity .. ..			Medical Fees .. ..		
Rents Collected .. ..			Charitable Grants .. ..		
Bank Interest .. ..			Management Expenses:—		
Goods Sold .. ..			Rents .. ..		
Levies .. ..			Light .. ..		
Fines .. ..			Salaries .. ..		
Other Receipts:—			Printing and Stationery .. ..		
.....			* .....		
.....			Miscellaneous (small sums) .. ..		
.....			Total Expenditure for year		
.....			By Balance on last day of year .. ..		
			Amount in hands of Treasurer .. ..		
			Amount in Bank .. ..		
			Amount in Building Society .. ..		
			Amount in Securities .. ..		
			Amount in Stock .. ..		
			Amount in Shares and Debentures .. ..		
	\$			\$	

\* Insert any other large items of expenditure.

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**THE FRIENDLY SOCIETIES REGULATIONS, 1968**

**FORM 3, contd.**

**Statement of Assets**

The Assets of the Society on the 31st day of December, 19.... were :—

	\$	c
Cash Balance as shown above .. .. .		
Furniture, Fixtures and other property .. .. .		
Real Estate—Premises situate at .. .. .		
Any other property (name them) .. .. .		
	_____	
	<b>\$</b>	_____

**Membership**

On the 31st day of December, 19.... there were.....members on the books of the Society.

..... **Secretary**

.....  
**Secretary's Address**

.....  
**Date**

**Auditor's Certificate**

We the undersigned members of the abovementioned Society, Auditors duly appointed by the said Society, having gone carefully over all the Accounts, Vouchers, etc., of all Receipts and Disbursements in detail, certify that the above General Statement of the Funds and effect together with the Account of the Revenue and Expenditure of the Society is true and correct.

..... }  
..... } **Auditors**  
..... }

(Place).....

(Date).....

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**THE FRIENDLY SOCIETIES REGULATIONS, 1968**

**FORM 4**

ANNUAL BALANCE SHEET AS AT 31ST DECEMBER, 19.....

Name of Society:..... Reg. No.....

Address:.....

*Balance Sheet*

<u>Funds and Liabilities</u>			<u>Assets</u>		
Sick Fund	..	.. \$	Cash in Hand	..	.. \$
Funeral Fund	..	.. \$	Cash at Bank:—		
Management Fund	..	.. \$	Current a/c (state Bank)	..	.. \$
Medical Fund	..	.. \$			
Distress Fund	..	.. \$	Cash in Deposit a/c ..	..	.. \$
List any other Liabilities:—			Workers Savings and Loan Bank		\$
.....		\$	.....		\$
			(other Banks)		
.....		\$	.....		\$
.....		\$	Land and Building ..	..	.. \$
			Furniture, Fixtures and		
			Equipment ..	..	.. \$
			List any other Assets:—		
			.....		\$
			.....		\$
		\$	.....		\$

Signature of Secretary.....

Address.....

The undersigned, having had access to all Books, Deeds, Documents and Accounts of the Society and having examined the foregoing Balance Sheet, and verified the same with the Books, Deeds Documents and Accounts relating thereto, now sign the same as found to be correct, duly vouched, and in accordance with law (subject to a Special Report dated..... day of ..... 19....).

Signature of Auditor.....

Address.....

Date of Completion of Audit.....

\* If no Special Report is made, the words in brackets should be struck out. The Auditor must make a Special Report if in any respect the Accounts and Balance Sheet is incorrect, unvouched, or not in accordance with law. A copy of any Special Report must be sent to the Registrar with this Balance Sheet.

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**THE FRIENDLY SOCIETIES REGULATIONS, 1968**

**FORM 5**

**RETURN AS TO MATERNITY, DENTAL, OPTICAL AND OTHER BENEFITS FOR THE YEAR ENDED 31ST DECEMBER, 19.....**

Name of Society .....

Reg. No. ....

Address .....

Benefits (1)	Number of Members (2)	Rate or Allowance (3)	Number of Benefits (4)	Under Rule No. (5)	Amount (6)
<i>Maternity:</i>					
Dental:—					
(i) Extractions					
(ii) Treatment					
Optical:—					
(i) Examination or Refraction					
(ii) Glasses					
<i>Other Benefits:—</i> (To be specified)					

Total \$—————

N.B. The figures to be given in Columns Nos. 2 and 4 above need not necessarily agree.

**THE FRIENDLY SOCIETIES REGULATIONS, 1968**

**FORM 6**

**RETURN AS TO SICKNESS AND DEATH BENEFITS FOR THE YEAR ENDING 31ST DECEMBER, 19.....**

Name of Society..... Reg. No.....

Address.....

Benefits	Number of Members	Number of weeks and days pay	Rate per Week	Under Rule No.	Amount
<i>Sickness Pay:</i>		W.D.			
Full pay lasting weeks					
First period reduced pay lasting weeks					
Second period reduced pay lasting weeks					
Permanent Sick Pay					

Total Sickness Pay \$\_\_\_\_\_

**Sums at Death:—**

- of † ordinary members at \$
- of \* wife (or husband) at \$
- of † widows
- of † dependents
- of † pensioners
- of † long standing members
- of † juvenile members

Total \_\_\_\_\_ Total sums at Death \$ \_\_\_\_\_

†State number

\*State number where both husband and wife are members.

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