

GUIDELINES FOR GENERAL OFFICER AND SAR FOUNDATION BOARD CANDIDATES

The rules governing General Officer and SAR Foundation Board nominations may be found in Bylaw No. 20, Section 2. All candidates for General Office and the SAR Foundation Board (“Candidate”) are expected to abide by these campaign guidelines and additional self-disclosure requirements, regardless of whether the Candidate seeks endorsement from the Nominating Committee or runs from the Congress floor. The Candidate Guidelines, Candidate Self-Disclosure Statement, and Conflict of Interest Statement are available in the *NSSAR Handbook* and from SAR Headquarters or the Nominating Committee Chairman.

General Provisions

1. All Candidates, regardless of whether a race is contested or whether the candidate has received the Nominating Committee’s nomination, must follow these guidelines in good faith.
2. Each Candidate understands that serving as a General Officer or a member of the SAR Foundation Board is a commitment of both time and resources. Both the SAR and the SAR Foundation deserve candidates who will perform their respective positions to the best of their ability.
3. The SAR is a society of gentlemen; Candidates will remain respectful of other candidates. Upon conclusion of a contested election, all Candidates will accept the certified results of such election in a gentlemanly manner.
4. Candidates will refrain from intentionally making derogatory or knowingly false remarks about any other Candidate during the election cycle and will instruct their supporters and spokesmen to do the same.
5. Candidates may be responsible for the words or actions of a supporter in accordance with any relevant provisions of the NSSAR Bylaws regarding member discipline or the duties and responsibilities of the Ethics Committee.

Candidacy Announcement

6. There will be no campaigning or announcements, including distribution of flyers, made by any Candidate or his supporters until ten (10) days following the Annual Congress.

Campaign Materials

7. SAR letterheads, insignia, logos, graphics or trademarks will not be used by any candidate on his campaign materials; *provided, however*, that a Candidate may include a picture of himself wearing his SAR insignia, medals and awards.
8. At no time will campaign literature be distributed in any of the meeting rooms at a Leadership Meeting or the Annual Congress.
9. Candidates may display and distribute campaign materials on a designated table (a) during the Thursday and Friday of the Fall and Spring Leadership Meetings and (b) the Annual Congress. Candidates may make themselves available at a candidate table for campaigning purposes.

10. Candidates should remove their campaign materials (i) at the conclusion of Saturday's Board of Trustees meeting at a Leadership Meeting or (ii) upon conclusion of voting at the Annual Congress.
11. Candidates will refrain from greeting members or campaigning to members in the Annual Congress voting line. Candidates may make themselves available for discussion with members at a stationary location removed from the voting line but of sufficient distance to be recognized. No campaign material may be distributed at such a location.

Required Disclosures

12. *Candidates Seeking Endorsement by the Nominating Committee:* Within fifteen (15) days of his announcement, but no later than December 31st, a Candidate shall provide the following materials (the "Disclosures") to the Nominating Committee Chairman:
 - (1) a letter containing: (i) a statement identifying the specific General Officer or SAR Foundation Board position the Candidate is seeking; (ii) a statement as to his participation in a Candidates' Forum; (iii) an acknowledgement that he will serve if elected to the indicated office; and (iv) an affirmation of compliance with the National Society's Charter, Constitution, Bylaws, policies, and these Guidelines, during the campaign;
 - (2) a copy of his SAR Youth Protection Training Certificate;
 - (3) a completed Conflict of Interest Statement;
 - (4) a completed Candidate Self-Disclosure Statement (plus any attachments); and
 - (5) a copy of his campaign materials.
13. *Candidates Nominated from the Congress Floor:* Candidates seeking office without the endorsement of the Nominating Committee will provide the Disclosures to the President General at the time of his announcement, if announced prior to Congress, unless previously provided to the Nominating Committee Chairman. Candidates nominated directly from the floor at the Annual Congress will provide the Disclosures to the President General at the time of their nomination and the President General will read the Disclosures to the Congress at that time.
14. A Candidate who does not provide the Disclosures as required by these Guidelines may be removed from the ballot by a majority vote of the delegates present and voting at the Annual Congress.
15. Delegates to the Annual Congress may review a copy of each Candidate's Disclosures at the Headquarters Office at the Annual Congress or such other specified location.

Candidates' Forum

16. The Chairman of the Nominating Committee may hold a forum for any Candidate on the Thursday evening of the Fall Leadership Meeting. Each Candidate will be permitted to speak for no more than three (3) minutes for uncontested positions or five (5)

minutes for contested positions. A period for questions of no more than the specified time for presentations by each Candidate will be permitted after each candidate speaks.

**National Society of the Sons of the American Revolution
Candidate Self-Disclosure Statement**

This form must be completed by all General Officer and SAR Foundation Board candidates and is intended to provide members of the Sons of the American Revolution with information about those individuals seeking to lead the national organization. ***This form is not intended to be an automatic bar to service at the National level, but may be considered by the members of the NSSAR Nominating Committee and the delegates to the NSSAR Annual Congress when assessing fitness for election to the indicated position.*** Neither the National Society nor the Nominating Committee attests to the accuracy of the information disclosed in this statement, however, candidates are required to certify their answers subject to the Constitution and Bylaws of the National Society of the Sons of the American Revolution and the Guidelines for General Officer and SAR Foundation Board Candidates found in the *NSSAR Handbook*.

PERSONAL INFORMATION

Name: _____

National Number: _____ State Society: _____

Position Sought: _____

*Candidates should answer the following questions accurately and completely.
Please attach additional pages as necessary.*

CANDIDACY INFORMATION

1. Have you previously been a General Officer or SAR Foundation Board candidate? If so, please provide a list of offices and dates?
2. Have you reviewed the relevant NSSAR Bylaws provisions with respect to the office you are presently seeking? If so, briefly describe why you believe you are qualified for the position.
3. Please provide a copy of your current SAR resume, biographical statement, or campaign materials issued by you or with your consent.

PROFESSIONAL QUALIFICATIONS

4. Please identify your current profession. If retired, please provide your profession as of your retirement.
5. Do you currently maintain any professional licenses (i.e., CPA, CFP, bar licenses, teaching certificate, etc.)? If so, please list. ***Candidates for Chancellor General, Surgeon General, and Chaplain General must provide copies of such certifications as required by the Bylaws.***
6. Have any of your professional licenses in any jurisdiction ever been withdrawn, suspended, or revoked? If so, please attach an explanation.
7. Has any disciplinary action ever been taken in connection with any of your professional licenses? If so, please attach an explanation.

MILITARY SERVICE

8. If you served in the military and your discharge was anything other than honorable or you received a court martial, please provide the relevant information.

BACKGROUND DISCLOSURES

9. Have you ever been convicted of a felony, or a misdemeanor involving any act of dishonesty, moral turpitude, breach of trust or financial malfeasance? If yes, please attach a detailed explanation.

10. Have you ever had a civil judgment or administrative decision entered against you for fraud, breach of trust, embezzlement, money laundering, conversion, misappropriation of funds, or other similar financial impropriety? If yes, please attach a detailed explanation.

11. Have you filed a personal petition in bankruptcy within the last ten (10) years or has a petition in bankruptcy been filed against you within the last five (5) years? If yes, please attach a detailed explanation.

12. Have you ever owned more than 25% of the issued and outstanding shares or acted as an officer or director of any corporation by which, or against which, a petition in bankruptcy has been filed within the last five (5) years? If yes, please attach a detailed explanation.

13. Are you currently prohibited from serving as a corporate officer or a corporate director as a sanction imposed by the United States Securities & Exchange Commission, the Internal Revenue Service, the Office of the Comptroller of Currency or any similar state or federal governmental agency? If yes, please attach a detailed explanation.

14. Do you currently suffer from, or have you suffered from, any of the following ailments in the last five (5) years:

- a. Dependence on narcotics, drugs or intoxicating beverages?
- b. Pathological or compulsive behavior?
- c. Memory loss or impaired judgment?

If yes, please attach a detailed explanation.

15. Are there any circumstances in your professional or personal life that create a substantial question as to your qualifications or ability to serve in the office you are presently seeking?

CERTIFICATION

I certify that the information given on this self-disclosure statement is complete, true and correct to the best of my knowledge and belief.

Executed this ____ day of _____, 20__

Signed: _____

Name: _____