29492022146082

Form 990-EZ

Short Form Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

► Do not enter social security numbers on this form as it may be made public.

► Information about Form 990-EZ and its instructions is at www.irs.gov/form990.

OMB No 1545-1150

2020

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the calendar year, or tax year beginning

B Check if applicable:
- [X] Address change
- [ ] Name change
- [ ] Initial return
- [ ] Final return/terminated
- [ ] Amended return
- [ ] Application pending

C
SONS OF NORWAY
LODSEN LODGE 4-138
PO BOX 6867
GREAT FALLS, MT 59406-6867

08

D Employer identification number: 81-6033521

E Telephone number: 406-454-3753

F Group Exemption Number ► 0108

G Accounting Method: [X] Cash [ ] Accrual Other (specify) ►

I Website: ► N/A

J Tax-exempt status (check only one) – [ ] 501(c)(3) [X] 501(c) (8) ◄(insert no) [ ] 4947(a)(1) or [ ] 527

H Check ► [X] if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

K Form of organization: [X] Corporation [ ] Trust [ ] Association [ ] Other

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts If gross receipts are $200,000 or more, or if total assets (Part II, column (B) below) are $500,000 or more, file Form 990 instead of Form 990-EZ ► $ 25,066.

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)

Check if the organization used Schedule O to respond to any question in this Part I [X]

REVENUE	1	Contributions, gifts, grants, and similar amounts received		1	200.
	2	Program service revenue including government fees and contracts		2	
	3	Membership dues and assessments		3	1,142.
	4	Investment income		4	22,626.
	5a	Gross amount from sale of assets other than inventory	5a		
	b	Less cost or other basis and sales expenses	5b		
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)		5c	
	6	Gaming and fundraising events			
	a	Gross income from gaming (attach Schedule G if greater than $15,000)	6a		
	b	Gross income from fundraising events (not including $ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds $15,000)	6b	1,098.	
	c	Less direct expenses from gaming and fundraising events	6c		
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)		6d	1,098.
	7a	Gross sales of inventory, less returns and allowances	7a		
	b	Less cost of goods sold	7b		
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		7c	
	8	Other revenue (describe in Schedule O)		8	
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8		► 9	25,066.
EXPENSES	10	Grants and similar amounts paid (list in Schedule O)		10	
	11	Benefits paid to or for members		11	
	12	Salaries, other compensation, and employee benefits		12	
	13	Professional fees and other payments to independent contractors		13	
	14	Occupancy, rent, utilities, and maintenance		14	6,354.
	15	Printing, publications, postage, and shipping		15	1,284.
	16	Other expenses (describe in Schedule O) SEE SCHEDULE O		16	17,606.
	17	**Total expenses.** Add lines 10 through 16		► 17	25,244.
NET ASSETS	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	-178.
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)		19	427,795.
	20	Other changes in net assets or fund balances (explain in Schedule O)		20	
	21	Net assets or fund balances at end of year. Combine lines 18 through 20		► 21	427,617.

Part II Balance Sheets (see the instructions for Part II)
Check if the organization used Schedule O to respond to any question in this Part II . . . X

		(A) Beginning of year		(B) End of year
22	Cash, savings, and investments	399,993.	22	399,630.
23	Land and buildings		23	
24	Other assets (describe in Schedule O) SEE SCHEDULE O	29,159.	24	29,159.
25	**Total assets**	429,152.	25	428,789.
26	**Total liabilities** (describe in Schedule O) SEE SCHEDULE O	1,357.	26	1,172.
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	427,795.	27	427,617.

Part III Statement of Program Service Accomplishments (see the instructions for Part III)
Check if the organization used Schedule O to respond to any question in this Part III . X

What is the organization's primary exempt purpose? SEE SCHEDULE O

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title

Expenses (Required for section 501 (c)(3) and 501(c)(4) organizations; optional for others.)

28 THE LODGE PAID THREE UNIVERSITY SCHOLARSHIPS TOTALING $900, $300 EACH. DUE TO THE PANDEMIC ALL OTHER ACTIVITIES WERE REDUCED OR COMPLETELY ELIMINATED DURING THE YEAR.
(Grants $) If this amount includes foreign grants, check here ▶ ☐ 28a

29
(Grants $) If this amount includes foreign grants, check here ▶ ☐ 29a

30
(Grants $) If this amount includes foreign grants, check here ▶ ☐ 30a

31 Other program services (describe in Schedule O)
(Grants $) If this amount includes foreign grants, check here ▶ ☐ 31a

32 **Total program service expenses** (add lines 28a through 31a) ▶ 32

Part IV List of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated — see the instructions for Part IV)
Check if the organization used Schedule O to respond to any question in this Part IV . . ☐

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (If not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
BRETT HATLER PRESIDENT	10	0.	0.	0.
MARK WENAAS VICE PRESIDENT	6	0.	0.	0.
DONALD L KEITH TREASURER	12	0.	0.	0.
MARGE KLINE SECRETARY	10	0.	0.	0.
PAT BUELING ASST SECRETARY	6	0.	0.	0.
MARLENE LANE MARSHAL	6	0.	0.	0.
JENNA BOLAND MARSHAL	6	0.	0.	0.
WAYNE KELLY COUNSELOR	6	0.	0.	0.

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V) Check if the organization used Schedule O to respond to any question in this Part V . . . SEE SCHEDULE O [X]

			Yes	No
33	Did the organization engage in any significant activity not previously reported to the IRS? If 'Yes,' provide a detailed description of each activity in Schedule O	33		X
34	Were any significant changes made to the organizing or governing documents? If 'Yes,' attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)	34		X
35a	Did the organization have unrelated business gross income of $1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a		X
b	If 'Yes,' to line 35a, has the organization filed a Form 990-T for the year? If 'No,' provide an explanation in Schedule O	35b		
c	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If 'Yes,' complete Schedule C, Part III	35c		X
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If 'Yes,' complete applicable parts of Schedule N	36		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ► 37a 0.			
b	Did the organization file **Form 1120-POL** for this year?	37b		X
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee **or** were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a		X
b	If 'Yes,' complete Schedule L, Part II and enter the total amount involved 38b N/A			
39	Section 501(c)(7) organizations Enter			
a	Initiation fees and capital contributions included on line 9 39a N/A			
b	Gross receipts, included on line 9, for public use of club facilities 39b N/A			
40a	Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under: N/A section 4911 ► N/A , section 4912 ► N/A ; section 4955 ► N/A			
b	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If 'Yes,' complete Schedule L, Part I	40b		
c	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ► 0.			
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax on line 40c reimbursed by the organization ► 0.			
e	All organizations At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T	40e		X
41	List the states with which a copy of this return is filed ► NONE			

42a The organization's books are in care of ► DONALD L KEITH Telephone no ► 406-454-3753

Located at ► 1314 7 ST S GREAT FALLS MT ZIP + 4 ► 59405

			Yes	No
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? If 'Yes,' enter the name of the foreign country. ►	42b		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
c	At any time during the calendar year, did the organization maintain an office outside the U.S ? If 'Yes,' enter the name of the foreign country: ►	42c		X

43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** – Check here ► [ ] N/A and enter the amount of tax-exempt interest received or accrued during the tax year ► 43 N/A			
44a	Did the organization maintain any donor advised funds during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ	44a		X
b	Did the organization operate one or more hospital facilities during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ	44b		X
c	Did the organization receive any payments for indoor tanning services during the year?	44c		X
d	If 'Yes' to line 44c, has the organization filed a Form 720 to report these payments? *If 'No,' provide an explanation in Schedule O*	44d		
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a		X
b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)	45b		X

		Yes	No
46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I	46		X

Part VII Section 501(c)(3) organizations only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VII ☐

		Yes	No
47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II	47		
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E	48		
49a Did the organization make any transfers to an exempt non-charitable related organization?	49a		
b If 'Yes,' was the related organization a section 527 organization?	49b		

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than $100,000 of compensation from the organization. If there is none, enter 'None'

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation

f Total number of other employees paid over $100,000 ►

51 Complete this table for the organization's five highest compensated independent contractors who each received more than $100,000 of compensation from the organization. If there is none, enter 'None'

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over $100,000 ►

52 Did the organization complete Schedule A? **Note.** All section 501(c)(3) organizations must attach a completed Schedule A ► ☐ Yes ☐ No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

Sign Here

► Donald Keith — Signature of officer — Date 04/21/2021

► DONALD L KEITH — TREASURER — Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
[redacted]	SELF-PREPARED			[redacted]

Firm's name ► [redacted]

Firm's address ► [redacted] Firm's EIN ► [redacted]

Phone no. [redacted]

May the IRS discuss this return with the preparer shown above? See instructions ► ☐ Yes ☐ No

SCHEDULE O (Form 990 or 990-EZ)	Supplemental Information to Form 990 or 990-EZ	OMB No 1545-0047
Department of the Treasury Internal Revenue Service	Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information. ► Attach to Form 990 or 990-EZ. ► Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.	2020 Open to Public Inspection

Name of the organization	Employer identification number
SONS OF NORWAY LODSEN LODGE 4-138	81-6033521

FORM 990-EZ, PART I, LINE 16 OTHER EXPENSES

ADVERTISING AND PROMOTION	$ 94.
BANK SERVICE CHARGES	53.
BLD REPAIRS/MAINTANCE	438.
CHARITABLE CONTRIBUTIONS	900.
COLLEGE SCHOLARSHIPS PAID	900.
DINNERS/MISC MEALS	1,925.
INSURANCE	734.
LAUNDRY/CLEANING	206.
LICENSES/PERMITS	42.
MEMBERSHIP EXPENSES	67.
MISC MERCHANDIZE PURCHASES	134.
MONTHLY DRAWING COSTS	50.
MONTHLY SOCIAL FUNDS	398.
SNOW/MOWING/LANDSCAPE	3,312.
SUPPLIES	147.
TELEPHONE	500.
UTILITIES	7,706.
TOTAL	$ 17,606.

FORM 990-EZ, PART II, LINE 24 OTHER ASSETS

	BEGINNING	ENDING
FURNITURE AND FIXTURES	$ 29,159.	$ 29,159.
TOTAL	$ 29,159.	$ 29,159.

FORM 990-EZ, PART II, LINE 26 TOTAL LIABILITIES

	BEGINNING	ENDING
MEMBERSHIP DUES IN TRANSIT	$ 239.	$ 578.
MEMORIAL FUNDS HELD	419.	0.
PIG FOUNDATION	109.	4.
SONS CULTURAL FUNDS HELD	292.	292.
TIP FUNDS HELD	298.	298.
TOTAL	$ 1,357.	$ 1,172.

FORM 990-EZ, PART III - ORGANIZATION'S PRIMARY EXEMPT PURPOSE

THE ORGANIZATION'S PRIMARY EXEMPT PURPOSE IS TO PROMOTE AND MAINTAIN KNOWLEDGE OF NORWEGIAN/SCANDINAVIAN HERITAGE TO THE MEMBERS AND THE GENERAL PUBLIC. THE LODGE PRESENTS CLASSES IN THE NORWEGIAN LANGUAGE AND HANDCRAFTS, SUCH AS HARDANGER EMBROIDERY,ROSEMALING, COOKING,AND WOODCARVING. IT PRESENTS DEMONSTRATIONS FOR MAKING NORWEGIAN FOODS/CRAFTS. THE LODGE HAS AN ETHNIC BOOTH AT THE STATE FAIR WHERE VOLUNTEER MEMBERS SELL NORWEGIAN MEATBALLS (AKA "VIKINGS") AND LEFSE. THE LODGE SUPPORTS THE SONS OF NORWAY FOUNDATION, NORWEGIAN CENT-A-DAY FOUNDATION AND

Name of the organization SONS OF NORWAY LODSEN LODGE 4-138

Employer identification number 81-6033521

FORM 990-EZ, PART III - ORGANIZATION'S PRIMARY EXEMPT PURPOSE (CONTINUED)

VINLAND REHABILITATION WITH BOTH TIME AND MONEY. IT CONTRIBUTES TO VARIOUS LOCAL CHARITABLE ORGANIZATIONS. THE LODGE SUPPORTS INDIVIDUALS IN NEED OF ASSISTANCE AND OFFERS SCHOLARSHIPS TO HIGH SCHOOL SENIORS. THE LODGE MEMBERS CELEBRATE THEIR

NORWEGIAN HERITAGE BY INVITING THE GENERAL PUBLIC TO AN OPEN HOUSE FOR PURPOSES OF IMPARTING NORWEGIAN INFORMATION TO THE PUBLIC.

THE ABOVE DESCRIBES NORMAL ACTIVITIES BY THE LODGE DURING YEAR 2020 THE LODGE DISCONTINUE MOST NORMAL ACTIVITIES DESCRIBED ABOVE.

FORM 990-EZ, PART V - REGARDING TRANSFERS ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

(A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS, DIRECTLY OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL BENEFIT CONTRACT? . . NO

(B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS, DIRECTLY OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT? . . NO