



Albuquerque Lodge No. 60

of Ancient Free & Accepted Mason of New Mexico

6600 Zuni Road SE, Albuquerque, New Mexico, 87108
+1(505)265-0800 ext. 123 abqmasons@gmail.com

2026 Budget and Charity Allocation

We received, and I have reviewed, financial statements from Eagle Strategies dated September 30, 2023, through September 30, 2025. The yearly budget and amount allowed to award to charities is decided on a three-year moving average of net investment income. Using the moving average model, budgeting is more stable and uniform. In 2023, the Lodge had an income of \$299,927.69; in 2024, the Lodge had an income of \$614,837.72; and in 2025, the Lodge had an income of \$377,094.36. The total income divided by three (3) is \$430,619.92.

The amount allowed to be distributed for Charity is 75% of the net income from investments from the prior year. We also have rollover funds from the 2025 allocation, in the amount of \$24,255.43. This year we will allocate **\$347,220.36** for Charity. The remaining 25% or \$107,654.98, of the prior year's net income will be reinvested into the investment account. It is my suggestion that the Charity Committee considers the amount to actually exhaust for charitable causes, keeping in mind that this number is not a reflection of the income for future years and it is possible for us to lose money in the market. In addition, we would like to purchase a new building which will have significant expenses associated with that.

The proposed budget for 2026 is attached as **Exhibit A**. Pursuant to our Bylaws, that budget cannot exceed 2.5 times the collected dues from last year.

In 2025, the Lodge received around **\$7,562.98** in annual dues. Our budget for 2026 cannot exceed **\$18,907.45**.



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As membership decreases, we may need to reconsider the amount for annual dues. Currently, our annual dues are sufficient to keep the lights on, but that is not to say this will be possible moving forward.

Sincerely,

By: /s/ Tristian J. Ortiz

Tristian J. Ortiz, Senior Warden and
Chair of Finance Committee

**Exhibit A
Proposed Budget Breakdown**

Expenses	Amount (\$)
Accounting and tax return (electronic file with IRS)	\$1,500
Rent	\$5000
Liability Insurance	\$850
Postage	\$100
Misc. Office Expenses	\$200
Past Master Apron, Case, and Gavel	\$500
Installation Dinner	\$800
Degree Dinner's (Cervantes, etc.)	\$2,500
Grand Lodge Travel (Stationed Officers of ABQ #60; Secretary and Treasurer)	\$1,500
Lodge Expenses (Aprons, Bibles, Monitors, Ciphers)	\$800
Candidate and Visitor Meals	\$600
Fellowship and Entertainment	\$1,000
Website Hosting and Email Addresses	\$600
Total	\$15,950