

What forms & documents do we have to file?

1. Order incorporation materials from the Secretary of State, or call (860) 509-6200. This office has a wealth of sample documents that allow you to secure a registered agent, perform a name search and reserve your corporate name.
2. Contact the Secretary of State's office and prepare & file Articles of Information. Keep in mind you need to file the Non-Stock Certificate of Incorporation. Be sure to ask for any other materials that explain the rules, etc. governing charitable solicitations, hiring employees, employer payroll and unemployment taxes, registering for taxes and for sales and/or income taxes under state and local law (if any), and matters of interest for setting up and managing a nonprofit in your state. These may come from several different offices at both the state and local levels.
3. Prepare and file your organization's bylaws. (There are many, many good books in libraries and bookstores to help you). In general, the IRS looks at the bylaws to determine whether a group is what it claims to be. This is a critical document, and of at all possible, should be reviewed by an attorney.
4. Order, prepare and file your Federal tax exemption application. This includes Form 8718 (User fee for Exempt Organization Determination Letter request), Package 1023 Application for Recognition of Exemption with instructions), Form SS-4 (Application for Employer Identification Number), Publication 557 (Tax-Exempt Status for Your Organization), and if you are filing as a foundation order Publication 578 (Tax Information for Private Foundations and Foundation Manager). It is assumed you will be applying for 501(c)(3) tax exempt status, and therefore you must file Form 1023, if not, you need to file Form 1024. If your organization is a church, or church-affiliated auxiliary or an association of churches, you are not required to file Form 1023. You must file your Form 1023 within 15 months after the end of the month in which you filed your Articles of Incorporation to ensure that your organization is tax exempt from inception. If not, your tax exemption does not become effective until the postmark date.
5. Apply for Federal Nonprofit Mailing Permit to qualify for lower rates on bulk mailings. Visit a big post office, or call the nearest Postal Service administrative office, and request the information packets for nonprofit mailers. The postal service will require a copy of each of the items mentioned above, plus copies of your literature, newsletters, or promotional materials before approving your request.
6. Set up corporate checking account with local bank. They will require a copy of your organization's Employer Identification Number, Articles of Incorporation, etc.

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