

Employer Identification Number (EIN)

First obtain your coalition's EIN from the IRS. You will need basic contact information when your organization was started and income. You can now open a bank account in the name of your coalition, this protects your members from opening a bank account with their personal SS#. Even if you do not do anything else, this is a good thing to have for your coalition. No additional paperwork is required.

https://irs.ein-tax-id-number.com/application/?gclid=CjwKCAjw7SWBhAnEiwAx8ZLajn0Dzpy1fAWBhlcLNa0zLTWEQBxSmGmq2mk-yui66wYW5xh2AY2qxoCnhQQAvD_BwE

Bank account

If you have funds, it is best to keep them in a bank account. As you decide on a bank, as about fees for low balances and anything else. You may need a bank account for fund transfers if you plan to apply for your incorporation and 501c3. It will also be helpful if you do any fundraising and plan to offer electronic fund transfers like Venmo, PayPal or plan to accept credit cards.

To open an account, you may need a copy of your by-laws and minutes that identify you as the person responsible for financial transactions. There will not be any additional paperwork required except watching your monthly statements.

Our coalition in Wichita has our account with Fidelity Bank.

Articles of Incorporation

Being incorporated makes your 501c3 less complicated and we were advised by an attorney to go through this process prior to submitting our application for that. It is filed with the Secretary of State, go to the website below, find Business Services, scroll down to forms, then scroll down to Articles of Incorporation. (See linked PDF) You will be required to submit names, title with your coalition and home addresses of every Board of Director for your coalition. **There is a \$20 fee for Incorporation.** You are also required to file an annual report within 6 months following the tax closing month (for us, June 15th) We have not had to do this yet, as we had been incorporated less than 6 months in 2021.

<https://sos.ks.gov>

https://sos.ks.gov/forms/business_services/AI.pdf

501c3

Filed with the Internal Revenue Service (IRS), go to the website below and search "1023EZ". This is the form you will fill out to apply for your 501c3. First, find the "Instructions for 1023EZ" and read it all! Toward the end of that form, you will find the eligibility worksheet. You need to fill this out. If you answer yes to any of these questions, you will need to fill out the full 1023, I do not know anything about that. Toward the end of the eligibility worksheet, you will be asked for your National Taxonomy of Exempt Entities (NTEE) Code, we used **E01** (Health- General and Rehabilitative, Alliance/Advocacy Organization).

For this application you will again need names, titles and addresses of all your Board. In addition, you will need to attest that your organization has organizing documents (by-laws) and that your organizing

documents contain a dissolution provision that is consistent with the state law. There is a \$275.00 fee for filing the 501c3. This is by no means everything you will be asked, but it is a great start. Once you obtain your 501c3, you do have to file an annual report. This can be done online and is called "990-N e-postcard". There are income guidelines for this form, if your coalition income is less than \$50,000, you can continue to file the 990N.

<https://www.irs.gov>

My suggestions:

Make sure before you start the process that your By-laws are up to date and contain the necessary verbiage to qualify.

Read through requirements and make sure you are willing to take on the work!

Make sure someone is keeping up to date on reporting.

A bonus item!

Retail Sales Tax Registration

If you plan to sell items, legally, you are required to charge and pay Kansas Sales Tax. Register for an account with the Kansas Department of Revenue. We did this when we sold books at the KBC Annual Conference. There is no fee to file for this but you will be required to file an annual report EVEN if you do not sell anything or have any income.

<https://www.ksrevenue.gov/business.html>