# **Your Start-up Checklist**

#### What do you need to remember when registering your new nonprofit in the U.S.?The following table describes the required steps to register your new nonprofit.

#### Starting a Nonprofit Organization

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| **Activity** | **Comment** | **Notes** |
| draft mission statement | draft a brief mission statement that describes the charitable purpose of your new organization;your board should soon review it during strategic planning and authorize the statement |  |
| recruit board members | (if you plan to incorporate in your state) recruit at least enough board members to meet state requirements for a corporate board (contact state attorney's office); if you don't plan toincorporate, consider an informal advisory board to help guide you |  |
| get a lawyer | to help you file articles of incorporation (if you plan to incorporate), application to IRS for tax- exemption (if you plan to seek exemption from federal taxes); you can do most of the work yourself, but at least have a lawyer review the materials before submission; will eventuallyneed special expertise to review personnel policies |  |
| get banker andbank account | get a bank account; seek bank that understandsneeds of new, small nonprofit |  |
| get accountant | get an accountant or other finance expert to help you set up basic bookkeeping system;when you get a board treasurer, then he/she can be very helpful in this regard |  |
| get insurance agent | you may need liability insurance, property insurance, and when you hire staff: worker'scompensation, health and life insurance benefits, etc. |  |
| draft articles of incorporation and get board approval | these specify legal description of your organization and power to the board; you'll need to draft these only if you plan to file for incorporation with your state; the board shouldapprove the articles before submission |  |

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| draft bylaws and get board approval | these specify how the board will operate and configure the staff; some states require these; some of this information will be in the Articles ifyou file Articles; the board should approve the bylaws |  |
| file forincorporation with state | register for incorporation including submittingyour drafted and approved Articles (if you plan to incorporate); may need to submit bylaws, too; also find out what various reports the state wants from nonprofits |  |
| file for federaltax-exempt with IRS | apply for tax-exempt status (to be exempt frompaying federal taxes); board should approve this filing before submission |  |
| get state taxexemption from state | once you get IRS exemption, file for any state tax exemptions |  |
| get property tax exemptionfrom city | once you get IRS exemption, file for any state tax exemptions |  |
| get solicitationlicense | if you plan to solicit funds, your city mayrequire a solicitation license |  |
| get mail permit | this permit gives you a discount on bulkmailings |  |
| get federalemployer number | (do this once you start to hire employees) getfederal employer number to withhold income and FICA (once you hire employees) |  |
| getunemployment insurance req's | do this once you start to hire employees |  |