



THE GOLD BEACON, PLLC

Nonprofit Sustainability Solutions

We're Here to Serve You!

The GOLD Beacon, PLLC is a national development consulting agency offering project solutions to nonprofit, for-profit, and government agencies seeking to be recognized champions in social change. Our comprehensive services increase productivity, improve workplace culture, build team cohesiveness, and strengthen sustainability. We successfully drive teams toward their mission by increasing their capacity and readiness towards mission success.

What's in this file:

- ✓ "How to Start a Nonprofit: Texas Edition" Checklist
- ✓ TX Certificate of Formation (Form 202)
- ✓ NTEE Codes
- ✓ EIN Filing Form (SS-4)
- ✓ Federal Tax Exemption Filing Form (1023-EZ)
- ✓ Texas Tax Exemption Filing Form (AP-204 & AP-205)

This checklist is the property of the copyright owner: The GOLD Beacon, PLLC. The custom tasks and processes used to create the checklist are created by The GOLD Beacon, PLLC, and are not available elsewhere. The government forms and tools are open-source and are not the property of The GOLD Beacon, PLLC, but rather are included in this checklist for the user's convenience.

This checklist is to help you start or strengthen a nonprofit. You may not sell the checklist in any form or distribute the checklist for use by anyone else, either paid or free.

 (325) 710-9968

 info@thegoldbeacon.com

 www.thegoldbeacon.com



Kimberly Henry, LMSW
Founder/CEO

10 Steps to Starting a Nonprofit

Are you ready to change the lives of others but don't know where to start?

Follow this simple checklist to establish your nonprofit in a sustainable manner with strategy and purpose.

1. Idea

Define the problem you aim to solve, and your proposed solution, and identify the beneficiaries and areas you'll serve.

2. Market Research

Understand the depth of the issue and outline the resources, demographics, and financials to address it.

3. Mission and Vision

Articulate your organization's purpose and long-term goals in concise statements.

4. Brand

Create a unique identity by registering a name, designing a logo, and possibly developing a slogan.

5. Structure

Form your leadership team, staff, and volunteer layout, and identify potential partners for your mission.

6. Paperwork

Navigate the essential legal steps, from filing your formation documents to securing an Employer Identification Number (EIN).

7. Strategic Planning

Develop a financial and operational road map with clear objectives and plans for fundraising and evaluation.

8. Awareness

Establish an online presence and engage with your community through various channels to raise profile and funds.

9. Action

Begin your nonprofit's activities and keep track of results through regular meetings and data collection.

10. Evaluation

Analyze your effectiveness and community impact through various forms of assessments and reporting.

Thank you for exploring our checklist. For a deeper dive, consider purchasing our comprehensive guide, packed with templates and expert advice. If you're serious about creating a lasting impact through your nonprofit, we also offer personalized consulting services to help you navigate the complex journey ahead.

THE GOLD BEACON, PLLC

Nonprofit Sustainability Solutions

(325) 710-9968 ~ thegoldbeacon.com ~ info@thegoldbeacon.com

© THE GOLD BEACON, PLLC



Checklist to Starting a Nonprofit

Texas Edition

Are you ready to change the lives of others but don't know where to start?

Follow this simple checklist to establish your nonprofit in a sustainable manner with strategy and purpose.

1. Idea

- Observed Problem
- Proposed Solution
- Intended Recipients
- Geographical Area

2. Market Research

- Statement of Need
- Data on the Problem
- Proven techniques to help
- Resources needed
- Proposed programs
- Expected expenses
- Recipient Demographics
- Cost to Recipient
- Potential Donors
- Motivations to Donate

3. Mission and Vision

- Mission Statement (< 50 words)
- Vision Statement (< 20 words)

4. Brand

- Name Check - www.sos.state.tx.us
- Create Logo
- Develop Slogan (optional)

5. Structure

- Identify at least three Board Members
- Decide on Staff structure
- Decide on Volunteer structure
- Define Initial Expectations
- Identify Allies

6. Paperwork

- Bylaws
- TX Certificate of Formation (Form 202)
- Establish P.O. Box
- Decide top 3 NTEE Codes
- File for EIN (SS-4)
- File for Federal Tax Exemption (1023-EZ)
- File for Texas Tax Exemption (AP-204 or 205)
- Open a Bank Account

7. Strategic Planning

- Budget & Funding Sources
- Logic Model
- SMART Goals
- Fundraising Plan
- Evaluation Plan

8. Awareness

- Online Development
- Community Engagement
- News and Publications

9. Action

- Regular Meetings
- Regular Activities
- Data Gathering

10. Evaluation

- SWOT Analysis
- Community Surveys
- Recipient Surveys
- Self-Assessments
- Annual Reports



**Form 202
(Revised 12/21)**

Submit in duplicate to:
Secretary of State
P.O. Box 13697
Austin, TX 78711-3697
512 463-5555

Filing Fee: \$25



This space reserved for office use.

**Certificate of Formation
Nonprofit Corporation**

Article 1 – Entity Name and Type

The filing entity being formed is a nonprofit corporation. The name of the entity is:

Article 2 – Registered Agent and Registered Office

(See instructions. Select and complete either A or B and complete C.)

A. The initial registered agent is an organization (cannot be entity named above) by the name of:

OR

B. The initial registered agent is an individual resident of the state whose name is set forth below:

First Name *M.I.* *Last Name* *Suffix*

C. The business address of the registered agent and the registered office address is:

Street Address *City* *State* *Zip Code*
TX

Article 3 – Management

The management of the affairs of the corporation is vested in the board of directors. The number of directors constituting the initial board of directors and the names and addresses of the persons who are to serve as directors until the first annual meeting of members or until their successors are elected and qualified are as follows:

A minimum of three directors is required.

Director 1				
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	<i>Suffix</i>	
<i>Street or Mailing Address</i>	<i>City</i>	<i>State</i>	<i>Zip Code</i>	<i>Country</i>

Director 2				
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	<i>Suffix</i>	
<i>Street or Mailing Address</i>	<i>City</i>	<i>State</i>	<i>Zip Code</i>	<i>Country</i>

Director 3				
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	<i>Suffix</i>	
<i>Street or Mailing Address</i>	<i>City</i>	<i>State</i>	<i>Zip Code</i>	<i>Country</i>

OR

The management of the affairs of the corporation is to be vested in the nonprofit corporation's members.

Article 4 – Membership

(See instructions. Do not select statement B if the corporation is to be managed by its members.)

A. The nonprofit corporation shall have members.

B. The nonprofit corporation will have no members.

Article 5 – Purpose

(See instructions. This form does not contain language needed to obtain a tax-exempt status on the state or federal level.)

The nonprofit corporation is organized for the following purpose or purposes:

The following text area may be used to include any additional language or provisions that may be needed to obtain tax-exempt status.

Initial Mailing Address

(Provide the mailing address to which state franchise tax correspondence should be sent.)

Mailing Address *City* *State* *Zip Code* *Country*

Supplemental Provisions/Information

(See instructions.)

Text Area: [The attached addendum, if any, is incorporated herein by reference.]

Organizer

The name and address of the organizer:

Name

Street or Mailing Address *City* *State* *Zip Code*

Effectiveness of Filing (Select either A, B, or C.)

- A. This document becomes effective when the document is filed by the secretary of state.
- B. This document becomes effective at a later date, which is not more than ninety (90) days from the date of signing. The delayed effective date is: _____
- C. This document takes effect upon the occurrence of a future event or fact, other than the passage of time. The 90th day after the date of signing is: _____

The following event or fact will cause the document to take effect in the manner described below:

Execution

The undersigned affirms that the person designated as registered agent has consented to the appointment. The undersigned also affirms that, to the best knowledge of the undersigned, the name provided as the name of the filing entity does not falsely imply an affiliation with a governmental entity. The undersigned signs this document subject to the penalties imposed by law for the submission of a materially false or fraudulent instrument and certifies under penalty of perjury that the undersigned is authorized to execute the filing instrument.

Date: _____

Signature of organizer

Printed or typed name of organizer

National Taxonomy of Exempt Entities (NTEE) Codes.

<p>Arts, Culture & Humanities</p> <p>Code</p>	<p>B90 Educational Services</p> <p>B92 Remedial Reading & Encouragement</p> <p>B94 Parent & Teacher Groups</p> <p>B99 Education N.E.C.</p>	<p>E62 Emergency Medical Services & Transport</p> <p>E65 Organ & Tissue Banks</p> <p>E6A Pharmacies & Drugstores</p> <p>E70 Public Health</p> <p>E80 Health (General & Financing)</p> <p>E86 Patient & Family Support</p> <p>E90 Nursing</p> <p>E91 Nursing Facilities</p> <p>E92 Home Health Care</p> <p>E99 Health Care N.E.C.</p>	<p>G94 Geriatrics</p> <p>G96 Neurology & Neuroscience</p> <p>G98 Pediatrics</p> <p>G99 Voluntary Health Associations, Medical Disciplines N.E.C.</p> <p>G9B Surgical Specialties</p>
<p>A01 Alliances & Advocacy</p> <p>A02 Management & Technical Assistance</p> <p>A03 Professional Societies & Associations</p> <p>A05 Research Institutes & Public Policy Analysis</p> <p>A11 Single Organization Support</p> <p>A12 Fund Raising & Fund Distribution</p> <p>A19 Support N.E.C.</p> <p>A20 Arts & Culture</p> <p>A23 Cultural & Ethnic Awareness</p> <p>A24 Folk Arts</p> <p>A25 Art Education</p> <p>A26 Arts & Humanities Councils & Agencies</p> <p>A27 Community Celebrations</p> <p>A30 Media & Communications</p> <p>A31 Film & Video</p> <p>A32 Television</p> <p>A33 Printing & Publishing</p> <p>A34 Radio</p> <p>A40 Visual Arts</p> <p>A50 Museums</p> <p>A51 Art Museums</p> <p>A52 Children's Museums</p> <p>A54 History Museums</p> <p>A56 Natural History & Natural Science Museums</p> <p>A57 Science & Technology Museums</p> <p>A60 Performing Art</p> <p>A61 Performing Arts Centers</p> <p>A62 Dance</p> <p>A63 Ballet</p> <p>A65 Theater</p> <p>A68 Music</p> <p>A69 Symphony Orchestras</p> <p>A6A Opera</p> <p>A6B Singing & Choral Groups</p> <p>A6C Bands & Ensembles</p> <p>A6E Performing Arts Schools</p> <p>A70 Humanities Organizations</p> <p>A80 Historical Organizations</p> <p>A82 Historical Societies & Historic Preservation</p> <p>A84 Commemorative Events</p> <p>A90 Arts Service</p> <p>A99 Arts, Culture & Humanities N.E.C.</p>	<p>Environment</p> <p>Code</p> <p>C01 Alliances & Advocacy</p> <p>C02 Management & Technical Assistance</p> <p>C03 Professional Societies & Associations</p> <p>C05 Research Institutes & Public Policy Analysis</p> <p>C11 Single Organization Support</p> <p>C12 Fund Raising & Fund Distribution</p> <p>C19 Support N.E.C.</p> <p>C20 Pollution Abatement & Control</p> <p>C27 Recycling</p> <p>C30 Natural Resources Conservation & Protection</p> <p>C32 Water Resources, Wetland Conservation & Management</p> <p>C34 Land Resources Conservation</p> <p>C35 Energy Resources Conservation & Development</p> <p>C36 Forest Conservation</p> <p>C40 Botanical, Horticultural & Landscape Services</p> <p>C41 Botanical Gardens & Arboreta</p> <p>C42 Garden Clubs</p> <p>C50 Environmental Beautification</p> <p>C60 Environmental Education</p> <p>C99 Environmental N.E.C.</p>	<p>Mental Health & Crisis Intervention</p> <p>Code</p> <p>F01 Alliances & Advocacy</p> <p>F02 Management & Technical Assistance</p> <p>F03 Professional Societies & Associations</p> <p>F05 Research Institutes & Public Policy Analysis</p> <p>F11 Single Organization Support</p> <p>F12 Fund Raising & Fund Distribution</p> <p>F19 Support N.E.C.</p> <p>F20 Substance Abuse Dependency, Prevention & Treatment</p> <p>F21 Substance Abuse Prevention</p> <p>F22 Substance Abuse Treatment</p> <p>F30 Mental Health Treatment</p> <p>F31 Psychiatric Hospitals</p> <p>F32 Community Mental Health Centers</p> <p>F33 Residential Mental Health Treatment</p> <p>F40 Hot Line & Crisis Intervention</p> <p>F42 Sexual Assault Services</p> <p>F50 Addictive Disorders N.E.C.</p> <p>F52 Smoking Addiction</p> <p>F53 Eating Disorders & Addictions</p> <p>F54 Gambling Addiction</p> <p>F60 Counseling</p> <p>F70 Mental Health Disorders</p> <p>F80 Mental Health Associations</p> <p>F99 Mental Health & Crisis Intervention N.E.C.</p>	<p>Medical Research</p> <p>Code</p> <p>H01 Alliances & Advocacy</p> <p>H02 Management & Technical Assistance</p> <p>H03 Professional Societies & Associations</p> <p>H05 Research Institute & Public Policy Analysis</p> <p>H11 Single Organization Support</p> <p>H12 Fund Raising & Fund Distribution</p> <p>H19 Support N.E.C.</p> <p>H20 Birth Defects & Genetic Diseases Research</p> <p>H25 Down Syndrome Research</p> <p>H30 Cancer Research</p> <p>H32 Breast Cancer Research</p> <p>H40 Diseases of Specific Organs Research</p> <p>H41 Eye Diseases, Blindness & Vision Impairments Research</p> <p>H42 Ear & Throat Diseases Research</p> <p>H43 Heart & Circulatory System Diseases & Disorders Research</p> <p>H44 Kidney Diseases Research</p> <p>H45 Lung Diseases Research</p> <p>H48 Brain Disorders Research</p> <p>H50 Nerve, Muscle & Bone Diseases Research</p> <p>H51 Arthritis Research</p> <p>H54 Epilepsy Research</p> <p>H60 Allergy-Related Diseases Research</p> <p>H61 Asthma Research</p> <p>H70 Digestive Diseases & Disorders Research</p> <p>H80 Specifically Named Diseases Research</p> <p>H81 AIDS Research</p> <p>H83 Alzheimer's Disease Research</p> <p>H84 Autism Research</p> <p>H90 Medical Disciplines Research</p> <p>H92 Biomedicine & Bioengineering Research</p> <p>H94 Geriatrics Research</p> <p>H96 Neurology & Neuroscience Research</p> <p>H98 Pediatrics Research</p> <p>H99 Medical Research N.E.C.</p> <p>H9B Surgical Specialties Research</p>
<p>Education</p> <p>Code</p> <p>B01 Alliances & Advocacy Organizations</p> <p>B02 Management & Technical Assistance</p> <p>B03 Professional Society & Associations</p> <p>B05 Research Institutes & Public Policy Analysis</p> <p>B11 Single Organization Support</p> <p>B12 Fund Raising & Fund Distribution</p> <p>B19 Support N.E.C.</p> <p>B20 Elementary & Secondary Schools</p> <p>B21 Preschools</p> <p>B24 Primary & Elementary Schools</p> <p>B25 Secondary & High Schools</p> <p>B28 Special Education</p> <p>B29 Charter Schools</p> <p>B30 Vocational & Technical Schools</p> <p>B40 Higher Education Institutions</p> <p>B41 Two-Year Colleges</p> <p>B42 Two-Year Colleges</p> <p>B43 Undergraduate Colleges</p> <p>B50 Graduate & Professional Schools</p> <p>B60 Adult Education</p> <p>B70 Libraries</p> <p>B80 Student Services</p> <p>B82 Scholarships & Student Financial Aid</p> <p>B83 Student Sororities & Fraternities</p> <p>B84 Alumni Associations</p>	<p>Animal-Related</p> <p>Code</p> <p>D01 Alliance & Advocacy</p> <p>D02 Management & Technical Assistance</p> <p>D03 Professional Societies & Associations</p> <p>D05 Research Institutes & Public Policy Analysis</p> <p>D11 Single Organization Support</p> <p>D12 Fund Raising & Fund Distribution</p> <p>D19 Support N.E.C.</p> <p>D20 Animal Protection & Welfare</p> <p>D30 Wildlife Preservation & Protection</p> <p>D31 Protection of Endangered Species</p> <p>D32 Bird Sanctuaries</p> <p>D33 Fisheries Resources</p> <p>D34 Wildlife Sanctuaries</p> <p>D40 Veterinary Services</p> <p>D50 Zoos & Aquariums</p> <p>D60 Animal Services N.E.C.</p> <p>D61 Animal Training</p> <p>D99 Animal Related N.E.C.</p>	<p>Voluntary Health Associations & Medical Disciplines</p> <p>Code</p> <p>G01 Alliances & Advocacy</p> <p>G02 Management & Technical Assistance</p> <p>G03 Professional Societies & Associations</p> <p>G05 Research Institute & Public Policy Analysis</p> <p>G11 Single Organization Support</p> <p>G12 Fund Raising & Fund Distribution</p> <p>G19 Support N.E.C.</p> <p>G20 Birth Defects & Genetic Diseases</p> <p>G25 Down Syndrome</p> <p>G30 Cancer</p> <p>G32 Breast Cancer</p> <p>G40 Diseases of Specific Organs</p> <p>G41 Eye Diseases, Blindness & Vision Impairments</p> <p>G42 Ear & Throat Diseases</p> <p>G43 Heart & Circulator System Diseases & Disorders</p> <p>G44 Kidney Diseases</p> <p>G45 Lung Diseases</p> <p>G48 Brain Disorder</p> <p>G50 Nerve, Muscle, & Bone Diseases</p> <p>G51 Arthritis</p> <p>G54 Epilepsy</p> <p>G60 Allergy Related Diseases</p> <p>G61 Asthma</p> <p>G70 Digestive Diseases & Disorders</p> <p>G80 Specific Named Disorders</p> <p>G81 AIDS</p> <p>G83 Alzheimer's Diseases</p> <p>G84 Autism</p> <p>G90 Medical Disciplines</p> <p>G92 Biomedicine & Bioengineering</p>	<p>Crime & Legal-Related</p> <p>Code</p> <p>I01 Alliances & Advocacy</p> <p>I02 Management & Technical Assistance</p> <p>I03 Professional Societies & Associations</p> <p>I05 Research Institutes & Public Policy Analysis</p> <p>I11 Single Organization Support</p> <p>I12 Fund Raising & Fund Distribution</p> <p>I19 Support N.E.C.</p> <p>I20 Crime Prevention</p> <p>I21 Youth Violence Prevention</p> <p>I23 Drunk Driving-Related</p> <p>I30 Correctional Facilities</p> <p>I31 Half-Way Houses for Offenders & Ex-Offenders</p> <p>I40 Rehabilitation Services for Offenders</p> <p>I43 Inmate Support</p> <p>I44 Prison Alternatives</p> <p>I50 Administration of Justice</p> <p>I51 Dispute Resolution & Mediation</p> <p>I60 Law Enforcement</p> <p>I70 Protection Against Abuse</p> <p>I71 Spouse Abuse Prevention</p> <p>I72 Child Abuse Prevention</p> <p>I73 Sexual Abuse Prevention</p>

National Taxonomy of Exempt Entities (NTEE) Codes. (Continued)

I80	Legal Services	L22	Senior Citizens' Housing & Retirement Communities	O03	Professional Societies & Associations	P86	Blind & Visually Impaired Centers
I83	Public Interest Law	L24	Independent Housing for People with Disabilities	O05	Research Institutes & Public Policy Analysis	P87	Deaf & Hearing Impaired Centers
I99	Crime & Legal-Related N.E.C.	L25	Housing Rehabilitation	O11	Single Organization Support	P88	LGBT Centers
Employment		L30	Housing Search Assistance	O12	Fund Raising & Fund Distribution	P99	Human Services N.E.C.
Code		L40	Temporary Housing	O19	Support N.E.C.	International, Foreign Affairs & National Security	
J01	Alliances & Advocacy	L41	Homeless Shelters	O20	Youth Centers & Clubs	Code	
J02	Management & Technical Assistance	L4A	Hotels (except Casino Hotels) & Motels	O21	Boys Clubs	Q01	Alliances & Advocacy
J03	Professional Societies & Associations	L4B	Bed and Breakfast Inns	O22	Girls Clubs	Q02	Management & Technical Assistance
J05	Single Organization Support	L50	Homeowners & Tenants Associations	O23	Boys & Girls Clubs	Q03	Professional Societies & Associations
J11	Consumer Lending	L80	Housing Support	O30	Adult & Child - Matching Programs	Q05	Research Institutes & Public Policy Analysis
J12	Fund Raising & Fund Distribution	L81	Home Improvement & Repairs	O31	Big Brothers & Big Sisters	Q11	Single Organization Support
J19	Support N.E.C.	L82	Housing Expense Reduction Support	O40	Scouting	Q12	Fund Raising & Fund Distribution
J20	Employment Preparation & Procurement	L99	Housing & Shelter N.E.C.	O41	Boy Scouts of America	Q19	Support N.E.C.
J21	Vocational Counseling	Public Safety, Disaster Preparedness & Relief		O42	Girl Scouts of the U.S.A.	Q20	Promotion of International Understanding
J22	Job Training	Code		O43	Camp Fire	Q21	International Cultural Exchange
J30	Vocational Rehabilitation	M01	Alliances & Advocacy	O50	Youth Development Programs	Q22	International Academic Exchange
J32	Goodwill Industries	M02	Management & Technical Assistance	O51	Youth Community Service Clubs	Q23	International Exchange N.E.C.
J33	Sheltered Employment	M03	Professional Societies & Associations	O52	Youth Development - Agricultural	Q30	International Development
J40	Labor Unions	M05	Research Institutes & Public Policy Analysis	O53	Youth Development - Business	Q31	International Agricultural Development
J99	Employment N.E.C.	M11	Single Organization Support	O54	Youth Development - Citizenship	Q32	International Economic Development
Food, Agriculture & Nutrition		M12	Fund Raising & Fund Distribution	O55	Youth Development - Religious Leadership	Q33	International Relief
Code		M19	Support N.E.C.	O99	Youth Development N.E.C.	Q35	International Democracy & Civil Society Development
K01	Alliances & Advocacy	M20	Disaster Preparedness & Relief Services	Human Services		Q40	International Peace & Security
K02	Management & Technical Assistance	M23	Search & Rescue Squads	Code		Q41	Arms Control & Peace
K03	Professional Societies & Associations	M24	Fire Prevention	P01	Alliances & Advocacy	Q42	United Nations Associations
K05	Research Institutes & Public Policy Analysis	M40	Safety Education	P02	Management & Technical Assistance	Q43	National Security
K11	Single Organization Support	M41	First Aid	P03	Professional Societies & Associations	Q50	International Affairs, Foreign Policy & Globalization
K12	Fund Raising & Fund Distribution	M42	Automotive Safety	P05	Research Institutes & Public Policy Analysis	Q51	International Economic & Trade Policy
K19	Support N.E.C.	M60	Public Safety Benevolent Associations	P11	Single Organization Support	Q70	International Human Rights
K20	Agricultural Programs	M99	Public Safety, Disaster Preparedness & Relief N.E.C.	P12	Fund Raising & Fund Distribution	Q71	International Migration & Refugee Issues
K25	Farmland Preservation	Recreation & Sports		P19	Support N.E.C.	Q99	International, Foreign Affairs & National Security N.E.C.
K26	Animal Husbandry	Code		P20	Human Service Organizations	Civil Rights, Social Action & Advocacy	
K28	Farm Bureaus & Granges	N01	Alliances & Advocacy	P21	American Red Cross	Code	
K2A	Other Vegetable (except Potato) & Melon Farming	N02	Employment Services	P22	Urban League	R01	Alliances & Advocacy Organizations
K2B	Soil Preparation, Planting, & Cultivating	N03	Professional Societies & Associations	P24	Salvation Army	R02	Management & Technical Assistance
K2C	Wineries	N05	Research Institutes & Public Policy Analysis	P26	Volunteers of America	R03	Professional Societies & Associations
K30	Food Programs	N11	Single Organization Support	P27	Young Men's or Women's Associations	R05	Research Institutes & Public Policy Analysis
K31	Food Banks & Pantries	N12	Fund Raising & Fund Distribution	P28	Neighborhood Centers	R11	Single Organization Support
K34	Congregate Meals	N19	Support N.E.C.	P29	Thrift Shops	R12	Fund Raising & Fund Distribution
K35	Soup Kitchens	N20	Camps	P30	Children & Youth Services	R19	Support N.E.C.
K36	Meals on Wheels	N2A	RV (Recreational Vehicle) Parks & Campgrounds	P31	Adoption	R20	Civil Rights
K40	Nutrition	N2B	Recreational and Vacation Camps (Except Campgrounds)	P32	Foster Care	R22	Minority Rights
K40	Nutrition	N30	Physical Fitness & Community Recreational Facilities	P33	Child Day Care	R23	Disabled Persons' Rights
K50	Home Economics	N31	Community Recreational Centers	P40	Family Services	R24	Womens' Rights
K6A	Meat Markets	N32	Parks & Playgrounds	P42	Single Parent Agencies	R25	Seniors' Rights
K6B	Confectionery & Nut Stores	N40	Sports Training Facilities, Agencies	P43	Family Violence Shelters, Services	R26	Lesbian & Gay Rights
K6C	Caterers	N50	Recreational Clubs	P44	In-Home Assistance	R28	Children's Rights
K6D	Mobile Food Services	N52	Fairs	P45	Family Services for Adolescent Parents	R30	Intergroup & Race Relations
K6E	Drinking Places	N60	Amateur Sports	P46	Family Counseling	R40	Voter Education & Registration
K6F	Snack Nonalcoholic Beverage Bars	N61	Fishing & Hunting	P47	Pregnancy Centers	R60	Civil Liberties
K90	Limited-Service Restaurants	N62	Basketball	P50	Personal Social Services	R61	Reproductive Rights
K91	Supermarkets & Other Grocery (except Convenience) Stores	N63	Baseball & Softball	P51	Financial Counseling	R62	Right to Life
K92	Convenience Stores	N64	Soccer	P52	Transportation Assistance	R63	Censorship, Freedom of Speech & Press
K93	Fruit & Vegetable Markets	N65	Football	P58	Gift Distribution	R67	Right to Die & Euthanasia
K94	All Other Specialty Food Stores	N66	Racquet Sports	P60	Emergency Assistance	R99	Civil Rights, Social Action & Advocacy N.E.C.
K95	Food (Health) Supplement Stores	N67	Swimming & Other Water Recreation	P61	Travelers' Aid	Community Improvement & Capacity Building	
K96	Warehouse Clubs & Supercenters	N68	Winter Sports	P62	Victims' Services	Code	
K97	Food Service Contractors	N69	Equestrian	P70	Residential Care & Adult Day Programs	S01	Alliances & Advocacy
K98	Full-Service Restaurants	N70	Amateur Sports Competitions	P71	Adult Day Care	S02	Management & Technical Assistance
K99	Food, Agriculture & Nutrition N.E.C.	N71	Olympics	P73	Group Homes	S03	Professional Societies & Associations
Housing & Shelter		N72	Special Olympics	P74	Hospices	S05	Research Institutes & Public Policy Analysis
Code		N77	Professional Athletic Leagues	P75	Supportive Housing for Older Adults	S11	Single Organization Support
L01	Alliances & Advocacy	N78	Recreation & Sports N.E.C.	P76	Homes for Children & Adolescents	S12	Fund Raising & Fund Distribution
L02	Management & Technical Assistance	N80		P77A	Residential Intellectual & Developmental Disability Facilities (Group Homes, Intermediate Care Facilities & Hospitals)		
L03	Professional Societies & Associations	N81		P80	Centers to Support the Independence of Specific Populations		
L05	Research Institutes & Public Policy Analysis	N82		P81	Senior Centers		
L11	Single Organization Support	N83		P82	Developmentally Disabled Centers		
L12	Fund Raising & Fund Distribution	N84		P83	Womens' Centers		
L19	Support N.E.C.	N85		P84	Ethnic & Immigrant Centers		
L20	Housing Development, Construction & Management	N86		P85	Homeless Centers		
L21	Low-Income & Subsidized Rental Housing	Youth Development					
		Code					
		O01	Alliances & Advocacy				
		O02	Management & Technical Assistance				

National Taxonomy of Exempt Entities (NTEE) Codes. (Continued)

S19	Support N.E.C.	Science & Technology Code U01 Alliances & Advocacy U02 Management & Technical Assistance U03 Professional Societies & Associations U05 Research Institutes & Public Policy Analysis U11 Single Organization Support U12 Fund Raising & Fund Distribution U19 Support N.E.C. U20 General Science U21 Marine Science & Oceanography U30 Physical & Earth Sciences U31 Astronomy U33 Chemistry & Chemical Engineering U34 Mathematics U36 Geology U40 Engineering & Technology U41 Computer Science U42 Engineering U50 Biological & Life Sciences Research U99 Science & Technology N.E.C.	V33	Ethnic Studies	Public & Societal Benefit Code W01 Alliances & Advocacy W02 Management & Technical Assistance W03 Professional Societies & Associations W05 Research Institutes & Public Policy Analysis W11 Single Organization Support W12 Fund Raising & Fund Distribution W19 Support N.E.C. W20 Government & Public Administration W22 Public Finance, Taxation & Monetary Policy W24 Citizen Participation W30 Military & Veterans' Organizations W40 Public Transportation Systems W50 Telecommunications W60 Financial Institutions W61 Credit Unions W70 Leadership Development W80 Public Utilities W90 Consumer Protection W99 Public & Societal Benefit N.E.C.	X30	Judaism
S20	Community & Neighborhood Development		V34	Urban Studies		X40	Islam
S21	Community Coalitions		V35	International Studies		X50	Buddhism
S22	Neighborhood & Block Associations		V36	Gerontology		X70	Hinduism
S30	Economic Development		V37	Labor Studies		X80	Religious Media & Communications
S31	Urban & Community Economic Development		V99	Social Science N.E.C.		X81	Religious Film & Video
S32	Rural Economic Development		Social Science Code V01 Alliances & Advocacy V02 Management & Technical Assistance V03 Professional Societies & Associations V05 Research Institutes & Public Policy Analysis V11 Single Organization Support V12 Fund Raising & Fund Distribution V19 Support N.E.C. V20 Social Science V21 Anthropology & Sociology V22 Economics V23 Behavioral Science V24 Political Science V25 Population Studies V26 Law & Jurisprudence V30 Interdisciplinary Research V31 Black Studies V32 Women's Study	Religion-Related Code X01 Alliances & Advocacy X02 Management & Technical Assistance X03 Professional Societies & Associations X05 Research Institutes & Public Policy Analysis X11 Single Organization Support X12 Fund Raising & Fund Distribution X19 Support N.E.C. X20 Christianity X21 Protestant X22 Roman Catholic		X82	Religious Television
S40	Business & Industry					X83	Religious Printing & Publishing
S41	Chambers of Commerce & Business Leagues					X84	Religious Radio
S43	Small Business Development					X90	Interfaith Coalitions
S46	Boards of Trade				X99	Religion Related, N.E.C.	
S47	Real Estate Associations				Mutual & Membership Benefit Code Y01 Alliances & Advocacy Y02 Management & Technical Assistance Y03 Professional Societies & Associations Y05 Research Institutes & Public Policy Analysis Y11 Single Organization Support Y12 Fund Raising & Fund Distribution Y19 Support N.E.C. Y20 Insurance Providers Y22 Local Benevolent Life Insurance Associations Y23 Mutual Insurance Companies & Associations Y24 Supplemental Unemployment Compensation Y25 State-Sponsored Workers' Compensation Reinsurance Organizations Y30 Pension & Retirement Funds Y33 Teachers' Retirement Fund Associations Y34 Employee-Funded Pension Trusts Y35 Multi-Employer Pension Plans Y40 Fraternal Societies Y41 Fraternal Beneficiary Societies Y42 Domestic Fraternal Societies Y43 Voluntary Employees Beneficiary Associations (Non-Government) Y44 Voluntary Employees Beneficiary Associations (Government) Y50 Cemeteries Y99 Mutual & Membership Benefit N.E.C.		
S50	Nonprofit Management						
S80	Community Service Clubs						
S81	Women's Service Clubs						
S82	Men's Service Clubs						
S99	Community Improvement & Capacity Building N.E.C.						
Philanthropy, Volunteerism & Grantmaking Foundations Code T01 Alliances & Advocacy T02 Management & Technical Assistance T03 Professional Societies & Associations T05 Research Institutes & Public Policy Analysis T11 Single Organization Support T12 Fund Raising & Fund Distribution T19 Support N.E.C. T20 Private Grantmaking Foundations T21 Corporate Foundations T22 Private Independent Foundations T23 Private Operating Foundations T30 Public Foundations T31 Community Foundations T40 Voluntaryism Promotion T50 Philanthropy, Charity & Voluntaryism Promotion T70 Federated Giving Programs T90 Named Trusts N.E.C. T99 Philanthropy, Voluntaryism & Grantmaking Foundations N.E.C.							

Application for Employer Identification Number

(For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.)
 ▶ Go to www.irs.gov/FormSS4 for instructions and the latest information.
 ▶ See separate instructions for each line. ▶ Keep a copy for your records.

EIN

Type or print clearly.	1 Legal name of entity (or individual) for whom the EIN is being requested					
	2 Trade name of business (if different from name on line 1)	3 Executor, administrator, trustee, "care of" name				
	4a Mailing address (room, apt., suite no. and street, or P.O. box)	5a Street address (if different) (Don't enter a P.O. box.)				
	4b City, state, and ZIP code (if foreign, see instructions)	5b City, state, and ZIP code (if foreign, see instructions)				
	6 County and state where principal business is located					
	7a Name of responsible party	7b SSN, ITIN, or EIN				
8a Is this application for a limited liability company (LLC) (or a foreign equivalent)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	8b If 8a is "Yes," enter the number of LLC members.....▶				
8c If 8a is "Yes," was the LLC organized in the United States?	<input type="checkbox"/> Yes <input type="checkbox"/> No					
9a Type of entity (check only one box). Caution: If 8a is "Yes," see the instructions for the correct box to check.	<input type="checkbox"/> Sole proprietor (SSN) _____ <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (enter form number to be filed) ▶ _____ <input type="checkbox"/> Personal service corporation <input type="checkbox"/> Church or church-controlled organization <input type="checkbox"/> Other nonprofit organization (specify) ▶ _____ <input type="checkbox"/> Other (specify) ▶ _____					
	<input type="checkbox"/> Estate (SSN of decedent) _____ <input type="checkbox"/> Plan administrator (TIN) _____ <input type="checkbox"/> Trust (TIN of grantor) _____ <input type="checkbox"/> Military/National Guard <input type="checkbox"/> State/local government <input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government <input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises Group Exemption Number (GEN) if any ▶ _____					
9b If a corporation, name the state or foreign country (if applicable) where incorporated	State	Foreign country				
10 Reason for applying (check only one box)	<input type="checkbox"/> Banking purpose (specify purpose) ▶ _____ <input type="checkbox"/> Started new business (specify type) ▶ _____ <input type="checkbox"/> Hired employees (Check the box and see line 13.) <input type="checkbox"/> Compliance with IRS withholding regulations <input type="checkbox"/> Other (specify) ▶ _____					
	<input type="checkbox"/> Changed type of organization (specify new type) ▶ _____ <input type="checkbox"/> Purchased going business <input type="checkbox"/> Created a trust (specify type) ▶ _____ <input type="checkbox"/> Created a pension plan (specify type) ▶ _____					
11 Date business started or acquired (month, day, year). See instructions.	12 Closing month of accounting year					
13 Highest number of employees expected in the next 12 months (enter -0- if none). If no employees expected, skip line 14.	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:33%; text-align:center;">Agricultural</td> <td style="width:33%; text-align:center;">Household</td> <td style="width:33%; text-align:center;">Other</td> </tr> </table>			Agricultural	Household	Other
				Agricultural	Household	Other
14 If you expect your employment tax liability to be \$1,000 or less in a full calendar year and want to file Form 944 annually instead of Forms 941 quarterly, check here. (Your employment tax liability generally will be \$1,000 or less if you expect to pay \$5,000 or less in total wages.) If you don't check this box, you must file Form 941 for every quarter. <input type="checkbox"/>						
15 First date wages or annuities were paid (month, day, year). Note: If applicant is a withholding agent, enter date income will first be paid to nonresident alien (month, day, year).....▶						
16 Check one box that best describes the principal activity of your business.						
<input type="checkbox"/> Construction <input type="checkbox"/> Rental & leasing <input type="checkbox"/> Transportation & warehousing <input type="checkbox"/> Accommodation & food service <input type="checkbox"/> Wholesale-agent/broker <input type="checkbox"/> Real estate <input type="checkbox"/> Manufacturing <input type="checkbox"/> Finance & insurance <input type="checkbox"/> Other (specify) ▶ _____ <input type="checkbox"/> Wholesale-other <input type="checkbox"/> Retail						
17 Indicate principal line of merchandise sold, specific construction work done, products produced, or services provided.						
18 Has the applicant entity shown on line 1 ever applied for and received an EIN? <input type="checkbox"/> Yes <input type="checkbox"/> No						
If "Yes," write previous EIN here ▶ _____						
Third Party Designee	Complete this section only if you want to authorize the named individual to receive the entity's EIN and answer questions about the completion of this form.					
	Designee's name		Designee's telephone number (include area code)			
	Address and ZIP code		Designee's fax number (include area code)			
Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.			Applicant's telephone number (include area code)			
Name and title (type or print clearly) ▶			Applicant's fax number (include area code)			
Signature ▶			Date ▶			

Streamlined Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 1023-EZ and its separate instructions is at www.irs.gov/form1023.

Note: If exempt status is approved, this application will be open for public inspection.

Check this box to attest that you have completed the Form 1023-EZ Eligibility Worksheet in the current instructions, are eligible to apply for exemption using Form 1023-EZ, and have read and understand the requirements to be exempt under section 501(c)(3).

Part I Identification of Applicant

1a Full Name of Organization _____

b Address (number, street, and room/suite). If a P.O. box, see instructions. **c** City _____ **d** State _____ **e** Zip Code + 4 _____

2 Employer Identification Number _____ **3** Month Tax Year Ends (MM) _____ **4** Person to Contact if More Information is Needed _____

5 Contact Telephone Number _____ **6** Fax Number (optional) _____ **7** User Fee Submitted _____

8 List the names, titles, and mailing addresses of your officers, directors, and/or trustees. (If you have more than five, see instructions.)

First Name:	Last Name:	Title:	Street Address:	City:	State:	Zip Code + 4:
First Name:	Last Name:	Title:	Street Address:	City:	State:	Zip Code + 4:
First Name:	Last Name:	Title:	Street Address:	City:	State:	Zip Code + 4:
First Name:	Last Name:	Title:	Street Address:	City:	State:	Zip Code + 4:
First Name:	Last Name:	Title:	Street Address:	City:	State:	Zip Code + 4:

9 a Organization's Website (if available): _____

b Organization's Email (optional): _____

Part II Organizational Structure

1 To file this form, you must be a corporation, an unincorporated association, or a trust. **Check the box** for the type of organization.
 Corporation Unincorporated association Trust

2 **Check this box** to attest that you have the organizing document necessary for the organizational structure indicated above.
 (See the instructions for an explanation of **necessary organizing documents**.)

3 Date incorporated if a corporation, or formed if other than a corporation (MMDDYYYY): _____

4 State of incorporation or other formation: _____

5 Section 501(c)(3) requires that your organizing document must limit your purposes to one or more exempt purposes within section 501(c)(3).
 Check this box to attest that your organizing document contains this limitation.

6 Section 501(c)(3) requires that your organizing document must not expressly empower you to engage, otherwise than as an insubstantial part of your activities, in activities that in themselves are not in furtherance of one or more exempt purposes.
 Check this box to attest that your organizing document does not expressly empower you to engage, otherwise than as an insubstantial part of your activities, in activities that in themselves are not in furtherance of one or more exempt purposes.

7 Section 501(c)(3) requires that your organizing document must provide that upon dissolution, your remaining assets be used exclusively for section 501(c)(3) exempt purposes. Depending on your entity type and the state in which you are formed, this requirement may be satisfied by operation of state law.
 Check this box to attest that your organizing document contains the dissolution provision required under section 501(c)(3) or that you do not need an express dissolution provision in your organizing document because you rely on the operation of state law in the state in which you are formed for your dissolution provision.

Part III Your Specific Activities

- 1 Enter the appropriate 3-character NTEE Code that best describes your activities (See the instructions): _____
- 2 To qualify for exemption as a section 501(c)(3) organization, you must be organized and operated exclusively to further one or more of the following purposes. By checking the box or boxes below, you attest that you are organized and operated exclusively to further the purposes indicated. **Check all that apply.**

<input type="checkbox"/> Charitable	<input type="checkbox"/> Religious	<input type="checkbox"/> Educational
<input type="checkbox"/> Scientific	<input type="checkbox"/> Literary	<input type="checkbox"/> Testing for public safety
<input type="checkbox"/> To foster national or international amateur sports competition		<input type="checkbox"/> Prevention of cruelty to children or animals
- 3 To qualify for exemption as a section 501(c)(3) organization, you must:
 - Refrain from supporting or opposing candidates in political campaigns in any way.
 - Ensure that your net earnings do not inure in whole or in part to the benefit of private shareholders or individuals (that is, board members, officers, key management employees, or other insiders).
 - Not further non-exempt purposes (such as purposes that benefit private interests) more than insubstantially.
 - Not be organized or operated for the primary purpose of conducting a trade or business that is not related to your exempt purpose(s).
 - Not devote more than an insubstantial part of your activities attempting to influence legislation or, if you made a section 501(h) election, not normally make expenditures in excess of expenditure limitations outlined in section 501(h).
 - Not provide commercial-type insurance as a substantial part of your activities. **Check this box** to attest that you have not conducted and will not conduct activities that violate these prohibitions and restrictions.
- 4 Do you or will you attempt to influence legislation? **Yes** **No**
(If yes, consider filing Form 5768. See the instructions for more details.)
- 5 Do you or will you pay compensation to any of your officers, directors, or trustees? **Yes** **No**
(Refer to the instructions for a definition of **compensation**.)
- 6 Do you or will you donate funds to or pay expenses for individual(s)? **Yes** **No**
- 7 Do you or will you conduct activities or provide grants or other assistance to individual(s) or organization(s) outside the United States? **Yes** **No**
- 8 Do you or will you engage in financial transactions (for example, loans, payments, rents, etc.) with any of your officers, directors, or trustees, or any entities they own or control? **Yes** **No**
- 9 Do you or will you have unrelated business gross income of \$1,000 or more during a tax year? **Yes** **No**
- 10 Do you or will you operate bingo or other gaming activities? **Yes** **No**
- 11 Do you or will you provide disaster relief? **Yes** **No**

Part IV Foundation Classification

Part IV is designed to classify you as an organization that is either a private foundation or a public charity. Public charity status is a more favorable tax status than private foundation status.

- 1 If you qualify for public charity status, check the appropriate box (**1a – 1c** below) and skip to **Part V** below.
 - a **Check this box** to attest that you normally receive at least one-third of your support from public sources or you normally receive at least 10 percent of your support from public sources and you have other characteristics of a publicly supported organization. **Sections 509(a)(1) and 170(b)(1)(A)(vi).**
 - b **Check this box** to attest that you normally receive more than one-third of your support from a combination of gifts, grants, contributions, membership fees, and gross receipts from permitted sources) from activities related to your exempt functions and normally receive not more than one-third of your support from investment income and unrelated business taxable income. **Section 509(a)(2).**
 - c **Check this box** to attest that you are operated for the benefit of a college or university that is owned or operated by a governmental unit. **Sections 509(a)(1) and 170(b)(1)(A)(iv).**
- 2 If you are not described in items **1a – 1c** above, you are a private foundation. As a private foundation, you are required by section 508(e) to have specific provisions in your organizing document, unless you rely on the operation of state law in the state in which you were formed to meet these requirements. These specific provisions require that you operate to avoid liability for private foundation excise taxes under sections 4941-4945.
 - Check this box** to attest that your organizing document contains the provisions required by section 508(e) or that your organizing document does not need to include the provisions required by section 508(e) because you rely on the operation of state law in your particular state to meet the requirements of section 508(e). (See the instructions for explanation of the section 508(e) requirements.)

Form 1023-EZ is filed electronically only on Pay.gov.

Part V Reinstatement After Automatic Revocation

Complete this section only if you are applying for reinstatement of exemption after being automatically revoked for failure to file required annual returns or notices for three consecutive years, and you are applying for reinstatement under section 4 or 7 of Revenue Procedure 2014-11. (Check only one box.)

- 1 **Check this box** if you are seeking retroactive reinstatement under section 4 of Revenue Procedure 2014-11. By checking this box you attest that you meet the specified requirements of section 4, that your failure to file was not intentional, and that you have put in place procedures to file required returns or notices in the future. (See the instructions for requirements.)
- 2 **Check this box** if you are seeking reinstatement under section 7 of Revenue Procedure 2014-11, effective the date you are filing this application.

Part VI Signature

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, and to the best of my knowledge it is true, correct and complete.

(Type name of signer)

(Type title or authority of signer)

**PLEASE
SIGN
HERE** ▶

(Signature of Officer, Director, Trustee, or other authorized official)

(Date)

Form **1023-EZ** (6-2014)

Form 1023-EZ is filed electronically only on Pay.gov.



Texas Application for Exemption – Federal and All Others

GLENN HEGAR

TEXAS COMPTROLLER OF PUBLIC ACCOUNTS

Texas tax laws provide exemptions from sales, franchise and/or hotel taxes for organizations meeting specific requirements. The exemptions available vary, depending upon the category of exemption under which the organization might qualify.

Please use this application, Form AP-204, to apply for exemption if you are

- applying on the basis of the organization's designation as a qualifying 501(c) organization, or
- applying on any basis OTHER THAN as a religious, charitable, educational organization or a homeowners' association.

Separate applications are available for organizations applying for exemption as a religious (Form AP-209), charitable (Form AP-205), educational (Form AP-207) or homeowners' association (Form AP-206).

The applications, laws, rules and other information about exemptions are online at

www.Comptroller.Texas.Gov/taxes/exempt

You can submit your completed application along with required documentation by mail, fax or email

Mail: Texas Comptroller of Public Accounts
Exempt Organizations Section
P.O. Box 13528
Austin, Texas 78711

FAX: (512) 475-5862
Email: exempt.orgs@cpa.texas.gov

We process applications in the order they are received. To establish claimed exemptions, we may require additional information. After review of the material, we will inform the organization in writing if it qualifies for exemption. The Comptroller, or an authorized representative of the Comptroller, may audit the records of an exempt organization at any time during regular business hours to verify the validity of the organization's exempt status.

If you have questions or need more information, contact us at 800-252-5555.

You have certain rights under Chapters 552 and 559, Government Code, to review, request and correct information we have on file about you. Contact us at the address or phone number listed on this form.

Texas Application for Exemption - Federal and All Others



• Remove All Staples • TYPE OR PRINT • Do NOT write in shaded areas.

1. Organizations applying for exemption under one of the categories listed below should check the appropriate box and complete this application.

Our publication, *Guidelines to Texas Tax Exemptions (96-1045)*, includes a description of the additional documentation required for each category of exemption. For the category you select, be sure to read the requirements listed in the publication. **If you send in an application without including the documentation described in the publication, we will return the application to you with a request for additional information. We are unable to process incomplete applications.**

- | | |
|--|---|
| <input type="checkbox"/> Federal Exemption under qualifying Internal Revenue Code (IRC) Section 501(c). Attach IRS Determination Letter. | <input type="checkbox"/> Credit Unions - Federal |
| <input type="checkbox"/> Cemetery Corporations | <input type="checkbox"/> Credit Unions - State |
| <input type="checkbox"/> Certain Insurance Corporations for Farm Mutuals, Local Mutual Aid Associations and Burial Associations | <input type="checkbox"/> Development Corporations |
| <input type="checkbox"/> Certain Insurance Corporations Licensed as Title Insurance Companies and Title Insurance Agents | <input type="checkbox"/> Electric Cooperatives |
| <input type="checkbox"/> Certain Corporations Subject to the Insurance Code | <input type="checkbox"/> Emergency Medical Service Corporations |
| <input type="checkbox"/> Chambers of Commerce | <input type="checkbox"/> Farmers' Cooperative Societies or cooperatives whose single member is a farmers' cooperative described in Section 521(b)(1), IRC, that has at least 500 farmer-fruit grower members. |
| <input type="checkbox"/> Convention and Tourist Promotional Agencies | <input type="checkbox"/> Health Facility Development Corporations |
| <input type="checkbox"/> Cooperative Associations | <input type="checkbox"/> Hospital Laundry Cooperative Associations |
| <input type="checkbox"/> Cooperative Credit Associations | <input type="checkbox"/> Housing Finance Corporations |
| <input type="checkbox"/> Corporations Exempted by Another Law | <input type="checkbox"/> Local Organizing Committees |
| <input type="checkbox"/> Corporations with Business Interest In Solar Energy Devices | <input type="checkbox"/> Lodges |
| <input type="checkbox"/> Corporations Organized for Agricultural Purposes | <input type="checkbox"/> Marketing Associations |
| <input type="checkbox"/> Corporations Organized for Conservation Purposes | <input type="checkbox"/> Nonprofit Water Supply Corporations |
| <input type="checkbox"/> Corporations Involved with City Natural Gas Facility | <input type="checkbox"/> Open-End Investment Companies |
| <input type="checkbox"/> Corporations Organized to Provide Cooperative Housing | <input type="checkbox"/> Corporations Organized to Promote County, City or Another Area (Public Interest Organizations) |
| <input type="checkbox"/> Corporations Organized to Provide Convalescent Homes for Elderly | <input type="checkbox"/> Railway Terminal Corporations |
| <input type="checkbox"/> Corporations Organized for Student Loan Funds or Student Scholarship Purposes | <input type="checkbox"/> Recycling Operations |
| | <input type="checkbox"/> Telephone Cooperatives |
| | <input type="checkbox"/> Volunteer Fire Departments |
| | <input type="checkbox"/> Youth Athletic Organizations |

2. ORGANIZATION NAME

(Legal name as provided on Articles of Incorporation, or if unincorporated, the governing document.)

3. ORGANIZATION MAILING ADDRESS

Street number, P.O. Box or rural route and box number

City	State/Province	ZIP Code	County (or country, if outside the U.S.)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Texas taxpayer number (if applicable)

5. Federal Employer Identification Number (EIN) (Required if applying for exemption on the basis of a federal exemption)

6. a) Enter filing information issued by the Texas Secretary of State:

File Number	<input type="text"/>	File Date	<input type="text"/>
			Month Day Year

OR

b) Check this box if this organization is not registered with the Texas Secretary of State.

Special note to non-Texas organizations: Include a file-stamped copy of your organization's formation documents AND a current Certificate of Existence from the Secretary of State or equivalent officer in your home state.

7. Contact information of the person submitting this application

Name	<input type="text"/>	Email Address	<input type="text"/>
------	----------------------	---------------	----------------------

Firm or Company Name	<input type="text"/>	Daytime Phone (Area code and number)	<input type="text"/>	Extension	<input type="text"/>
----------------------	----------------------	--------------------------------------	----------------------	-----------	----------------------

Address	<input type="text"/>	City	<input type="text"/>	State	<input type="text"/>	ZIP Code	<input type="text"/>
---------	----------------------	------	----------------------	-------	----------------------	----------	----------------------

We will notify you by email when the exemption has been added to let you know where the exemption can be verified online. If an email address is not provided, indicate where our response should be mailed: organization's mailing address or mailing address of the submitter.



Texas Application for Exemption – Charitable Organizations

GLENN HEGAR

TEXAS COMPTROLLER OF PUBLIC ACCOUNTS

Nonprofit charitable organizations should use this application to request exemption from Texas sales tax, hotel occupancy tax and franchise tax, if applicable. To receive a state tax exemption as a charitable organization, a nonprofit charitable organization must devote all or substantially all of its activities to the alleviation of poverty, disease, pain and suffering by providing food, drugs (medicine), medical treatment, shelter, clothing or psychological counseling directly to indigent or similarly deserving individuals for little or no fee. The organization's funds must be derived primarily from sources other than fees or charges for its services. Exemption from federal tax as a 501(c) organization is not required to qualify for exemption from state tax as a charitable organization.

The exemption for charitable organizations is provided for in Sections 151.310, 156.102 and 171.062 of the Texas Tax Code, and more detailed information can be found in Comptroller's Rules 3.322, 3.161, 3.541 and 3.583.

Some organizations will not qualify for an exemption as a charitable organization as that term is defined in Texas' law and rules, even though their activities may be charitable in nature. Such an organization might still qualify for exemption from Texas sales tax and franchise tax, if applicable, based on their exemption under certain sections of the Internal Revenue Code (IRC).

Texas tax law provides an exemption from sales taxes on goods and services purchased for use by organizations exempt under Section 501(c)(3), (4), (8), (10) or (19). However, exempt organizations are required to collect tax on most of their sales of taxable items. See *Exempt Organizations - Sales and Purchases*, Publication 96-122.

Texas law also provides an exemption from franchise taxes for corporations exempted from the federal income tax under IRC Section 501(c)(2), (3), (4), (5), (6), (7), (8), (10), (16), (19) or (25).

If your organization has been granted federal tax exemption under one of the qualifying sections listed above, your organization will be granted an exemption from Texas sales tax, or sales and franchise tax, on the basis of the Internal Revenue Service (IRS) exemption, as required by state law. Organizations that qualify for exemption based on the federal exemption are not exempt from hotel occupancy tax because the hotel occupancy tax law does not recognize any federal exemptions.

The laws, rules and other information about exemptions are online at www.Comptroller.Texas.Gov/taxes/exempt/.

You can submit your completed application along with required documentation by mail, fax, or email

Mail: Texas Comptroller of Public Accounts
Exempt Organizations Section
P.O. Box 13528
Austin, Texas 78711

FAX: (512) 475-5862
Email: exempt.orgs@cpa.texas.gov

We process applications in the order they are received. To establish claimed exemptions, we may require additional information. After review of the material, we will inform the organization in writing if it qualifies for exemption. The Comptroller, or an authorized representative of the Comptroller, may audit the records of an exempt organization at any time during regular business hours to verify the validity of the organization's exempt status.

If you have questions or need more information, contact us at 800-252-5555.

You have certain rights under Chapters 552 and 559, Government Code, to review, request and correct information we have on file about you. Contact us at the address or phone number listed on this form.

Texas Application For Exemption - Charitable Organizations



• Remove All Staples • TYPE OR PRINT • Do NOT write in shaded areas.

SECTION A

1. ORGANIZATION NAME

(Legal name as provided in the formation document, or if unincorporated, the governing document.)

2. ORGANIZATION MAILING ADDRESS

Street number, P.O. Box or rural route and box number

City	State/Province	ZIP Code	County (or country, if outside the U.S.)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Texas taxpayer number (if applicable)

4. a) Enter filing information issued by the Texas Secretary of State

File Number

File Date

OR

b) Check this box if this organization is not registered with the Texas Secretary of State.

5. Federal Employer Identification Number (EIN)

(Required if applying for exemption on the basis of a federal exemption)

6. Earliest date organization provided services

7. Contact information of the person submitting this application

Name	Email Address
<input type="text"/>	<input type="text"/>

Firm or Company Name	Daytime Phone (Area code and number)	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>

Address	City	State	ZIP Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

We will notify you by email when the exemption has been added to let you know where the exemption can be verified online. If an email address is not provided, indicate where our response should be mailed: organization's mailing address or mailing address of the submitter.

SECTION B

Please review the information below. If your organization is applying for exemption on the

basis of an IRS exemption, complete Item 8. If your organization is applying for exemption as a charitable organization under Texas law and rules, complete Item 9.

Item 8. Check here to apply for an exemption on the basis of a federal exemption.

Return the completed application with a copy of the entire IRS determination letter and any addenda. The organization name on the IRS determination letter must match the organization's legal name as listed in the Articles of Incorporation or governing document. If the IRS determination letter was issued more than four years prior to the current date, include a copy of a current IRS verification letter. To obtain a current letter, contact the IRS at 1-877-829-5500.

Item 9. Check here to apply for exemption as a charitable organization.

The following documents must be included with your application. Information may be in the form of a bulletin, brochure, written statement or Web site:

- A copy of your organization's actual or proposed two-year budget; a detailed description of all of the organization's activities; any amount of charges for services, how the charges are determined; and the criteria the recipients must meet to receive the services. Include a written statement or brochures, pamphlets or Web site addresses that describe the activities of the organization.
- A copy of any application used to determine eligibility for the organization's services.
- A copy of the IRS determination letter, if your organization is exempt under a qualifying section of the IRC or if the organization is affiliated with a parent entity that has a federal group exemption under one of the qualifying IRC sections. Attach a letter of verification from the parent entity that confirms the organization is a recognized subordinate under its federal group exemption. If the parent organization has not yet obtained exemption from Texas franchise tax and/or sales tax, provide a copy of the parent organization's entire IRS group exemption ruling letter along with the letter of affiliation.
 - **Special note to unincorporated entities:** Include your organization's governing documents, such as bylaws or constitution.
 - **Special note to non-Texas corporations:** Include a file-stamped copy of your organization's formation documents AND a current Certificate of Existence from the Secretary of State or equivalent officer in your home state.