

## CHARITABLE SOLICITATIONS ACT

If your PTA filled out this form last year, the Charities Program of the Secretary of State's office will send a postcard with instructions to go online for the Charitable Solicitations Registration/Renewal Form. As the registered agent for your PTA the Washington State PTA office will receive the postcard and forward it to your current treasurer. (Please see the attached instructions to help complete this Form.)

### Which Charitable Organization Registration/Renewal Form should your PTA file?

When figuring the gross receipts for Charitable Solicitations: **ALL** income from **EVERY** and **ANY** source, without deduction, EVEN the portion of membership fees collected by the PTA which are sent to a council or to the State PTA, are included in the gross receipts.

Depending on what your total gross receipts are, you would only fill out ONE of two forms.

Did your PTA gross **\$50,000** or more in the fiscal year of **July 1, 2012 to June 30, 2013**? If so, the form you must complete depends upon what form the PTA submitted to the Secretary of State's Charities Program. The due date for Charitable Solicitation Registration/Renewal Form is **May 31, 2014**. **A PTA should mail by May 21, 2014** in order to meet the extended due date and avoid a late fee.

- If PTA's gross receipts are \$50,000 or more and your PTA submitted a Charitable Solicitations Renewal Form last year (year-end June 30, 2012), you would fill out the **Charitable Organization Registration/Renewal Form** this year. There is a \$40.00 filing fee. The Charities Program will mail a renewal postcard to the organization's mailing address (e.g. WA State PTA) approximately 60 days (around April 1<sup>st</sup>) prior to the due date shown on the form.
- If your gross receipts are \$50,000 or more, and your PTA submitted an Optional Registration for an Exempt Organization last year, you would fill out the Charitable Solicitations Registration/Renewal Form this year. There is a \$60.00 initial filing fee. The application can be obtained by contacting the Charities Program or can be downloaded from their website at <http://www.sos.wa.gov/assets/charities/CharitiesFormRevisionApr2012.pdf>
- Remember, if this year you did not gross \$50,000 but your PTA might next year, then you should fill out the Charitable Organization Registration/Renewal Form and pay the appropriate fee (see instructions above).

**OR**

- If your gross receipts are **UNDER \$50,000**, you may fill out the **Optional Registration for an Exempt Organization Form**. There is **no** fee for the initial submission and **no** fee for updates. The registration may be filed **online** or can be downloaded from their website at <http://www.sos.wa.gov/assets/charities/8-1-11-OPTIONAL-REGISTRATION-PAPER-APPL.pdf>

Remember you would complete only **ONE** of the forms described above.

If you have any questions, please the State PTA office for assistance. You can reach us at (253) 565-2153 or 1-800-562-3804 or email [tvabinder@wastatepta.org](mailto:tvabinder@wastatepta.org)

# INSTRUCTIONS FOR ONLINE

## CHARITABLE ORGANIZATION REGISTRATION/RENEWAL FORM

The Charities Program sends a notice to charitable organizations approximately 60 days prior to their due date. The Charitable Solicitations Registration/Renewal Form must be received by the Charities Program on or before May 31, 2014, if your PTA's gross receipts were \$50,000 or more for the fiscal year July 1, 2012 through June 30, 2013.

### General Information

Please refer to your PTA Information Sheet for you legal information. This sheet was in the Leadership Packet and also sent to the president. This information may be found online on the membership enrollment site. Enter Registration Number that may be found on renewal postcard.

### Organization's Full Legal Name:

Provide the Corporation name of the PTA or the name of your PTA on the postcard.

### Mailing (WSPTA ADDRESS)

2003 65<sup>th</sup> Ave W, Tacoma WA 98466-6215

### Daytime Phone:

Provide the phone number of the PTA president or the person completing this form. (Required)

### Email:

Provide this information only if the PTA has an email address.

**Check if your PTA prefers to receive annual renewal reminders via email.  
(Only check this box, if your PTA has its own email address).**

### Website:

Provide this information only if the PTA has a website.

- Check if the organization prefers to receive annual renewal reminders via email (email address is required above)
- Only check the box if, you are using the school address as your mailing address.

### Street Address

If your mailing address is the WSPTA office then fill in your school address

### County (WA only)

The county your PTA is located, in the State of Washington.

### Alternate Address:

If the organization, or a commercial fundraiser operating on its behalf, uses any other mailing, street, electronic or internet address(s) (excluding those already listed in Section 1) to conduct solicitations in Washington State, then you must enclose a list of the other address(s) used.

## Section 2: Organization Structure

Check the box "WA State Nonprofit Corporation"

Enter your UBI number

## Section 3: Federal Status and Tax Information

1. Enter your IRS EIN or Tax Payer Id#
2. Federal Tax Exempt Status  
Check yes if you are a 501(c)(3) or a 501(c)(4) then check appropriate form you have completed.
  - Check the appropriate Tax Exempt status.
  - If you checked yes then check either 501(c)(3) or 501(c)(4).
  - If your status has changed include a copy of the IRS Letter of Determination.  
Check No if you are not a 501(c)(3) or 501(c)(4)  
Check Applied or  
Check Will Apply
3. If your PTA is not Tax Exempt then you would check the box "Annual gross receipts normally \$5,000 or less".

## Section 4: Also Known as Names

If your legal name does not include your local unit number, please put that number in this section and any other names that your PTA uses.

## Section 5: Describe the Purpose of the Organization

**PURPOSE DESCRIPTION:** *Promotion of the health, welfare, safety and education of children and youth. Work within, and in partnership with, the school community to develop programs, projects and activities for children and youth.*

## Section 6: New Entities and /OR First Time Filers Only Required information and Enclosures

1. Attach a copy of your 501(c)(3) or 501(c)(4) Letter of Determination
2. The Year End fiscal date is June 30, 20\_\_ \_\_.

*New organizations that have yet to complete their first accounting year, skip sections 7 and proceed to section 9*

## Section 7: Solicitation Report for Preceding, Completed Accounting Year

Do **NOT** attach a copy of Form 990 or 990EZ.

### Solicitation Report

Fiscal/Accounting year beginning: *July 1, 2012*

Fiscal/Accounting year ending: *June 30, 2013*

#### **Assets:**

1. Beginning Gross Assets (line 19 of 990EZ)

#### **Revenue:**

2. Gross Dollar Value of All Contributions from Solicitations. (Would be the sum of lines 1, 6a, 6b and 7a from Part I of IRS Form 990EZ)
3. Gross Dollar Value of Revenue from All other Sources (Would be the sum of lines 2, 3, 4, 5c and 8 on the IRS Form 990EZ)
4. Total Dollar Value of Gross Receipts (Would be the sum of lines 2 and 3 of the Charitable Organization Registration / Renewal and can also be found on Part I Page one: 5b, 6c, 7b and 9 of the IRS Form 990EZ. This should equal line L. on the IRS Form 990EZ)

#### **Expenses:**

5. Gross Dollar Value of Expenditures for Program Services (Would be found on Part III line 32 of the IRS Form 990EZ) plus the amount of membership fees paid to your council (if you are part of a council) or to WA State PTA (for non-council units). Councils would add the dollar amount of membership fees paid to WSPTA on behalf of their local units.
6. Total Gross Dollar Value of Program Services, Administration and Fundraising Expenditures (Would be the sum of lines 6c, 7b and 17 on the IRS Form 990EZ) Note: Line 6 should not be less than line 5
7. **Assets** Ending Gross Assets (line 22 of 990EZ)

(OPTIONAL) If you need to clarify or explain your Solicitations Report use this section to add your comments (if necessary, attach an additional sheet)

- Check Yes if the organization solicited or collected contributions in WA during the accounting year reported in Section 7.
- Check as many boxes as apply which best describe the ways in which the PTA promoted its fund raising activities

## Section 8: Current Officers Accepting Responsibility for the Charitable Organization

List a minimum of two officer's information who accepts responsibility for the PTA (add additional sheet if more than two)

## Section 9: Three, Current Officers/Employees Receiving the Greatest Compensation:

A PTA would mark No if it had no paid employees.

## Section 10: Person or Entity That Prepares, Reviews, or Audits Financial Information

List the name of person or persons that prepares the financial information being reported. This normally would be the Treasurer or Financial Review Committee Chairman.

## Section 11: Commercial Fundraisers

This would normally be **NO**.

## Section 12: Signature

The President or Treasurer must sign and date this Renewal Form.

Submit the completed registration form—by May 31, 2014.

### **ALL SUBMISSIONS ARE SUBJECT TO PUBLIC REVIEW**

- **Please sign and date before placing in the mail!**
- **Make checks payable to the "Secretary of State"**
- **Mail to: Secretary of State, Charities Program, PO Box 40234, 801 Capitol Way S., Olympia, WA 98504-0234.**

**NOTE:** All Submissions received (not postmarked) after the due date shown above will be assessed a \$50.00 late fee. Please allow 7-10 days for postal delivery and receipt validation. Mail by May 21, 2014, to avoid a late fee.

## COMBINED FUND DRIVE

Combined Fund Drive promotes workplace giving for all state employees. Personnel are encouraged to give to charities through payroll contributions or agency fundraising events. By agreeing to become a member of the Combined Fund Drive and completing the information in the following section, the organization will be provided access to the thousands of potential donors that the Combined Fund Drive has to offer.

Please indicate the organization's Primary Category of service (check up to three)

They may be a combination of the following:

- Arts, Cultures & Humanities
- Educational
- Philanthropy & Volunteerism
- Youth Development

### Certification Statement

- A PTA would check YES if they follow the accounting practices in the WSPTA Money Matters.
- APTA would check YES indicating the PTA is in compliance.

The completed Charitable Solicitations Registration/Renewal Form and a check in the appropriate amount made payable to the Secretary of State should be sent to the address below. Initial Registration is \$60 and Renewal is \$40. (Do not send the completed registration form and check to the Washington State PTA office.)

Please print legibly and do not staple, bind, or use highlighter on your submission. The Charities Program scans all incoming documents.

*If you have any questions, please call the State PTA office at (800) 562-3804 between 9:00 am and 5:00 pm Monday-Friday or email [tvasbinder@wastatepta.org](mailto:tvasbinder@wastatepta.org).*

**NOTE:** When you have completed your 2012 990EZ then you may go online and complete the Charitable Organization Registration/Renewal Form. If you have any question, please contact the Charities Program at their phone number of (800) 332-4483 extension "1" for self service option, "2" for registration assistance, or "3" responding to correspondence or email the Charities Program at [Charities@sos.wa.gov](mailto:Charities@sos.wa.gov). You will need to give your Charitable Registration Number.