

CHECKLIST FOR 501C3

Executive Platinum Pack for Startup 501c3 \$4900.00

- - Obtain DBA
- - Assist client in determining business status LLC or S-Corp
- - Create an operation agreement for business status
- - Connect client to logo designer
- - Obtain EIN # Call IRS tell them you're setting up a Non-Profit
- - Direct client to open business bank account
- - Register DBA as LLC or S-Corp with appropriate state
- - Obtain a registered agent
- - Advise client regarding minimum 3 board members; each need bio (client supplies)
- - Create Articles and By-Laws
- - Register with The Non-Profit Database
- - Call for Duns Number
- - Register for Sam Number
- - Create Dissolution Clause
- - Create Contribution Agreement
- - Grant Proposal
- - Create Fundraiser Proposal
- - Create Contract for Services Rendered
- - Create Sponsorship Letter
- - Create Client Application
- - Answer All questions regarding your program according to the Schedules needed for program(s) (Housing, Scholarships)
- - Complete 501c3 Application
- - Send application with fee required
- - Review with client regarding insurance
- - Review with client regarding grants