



Establish Your EIN

A guide for chapters and associations to obtain an EIN from the IRS

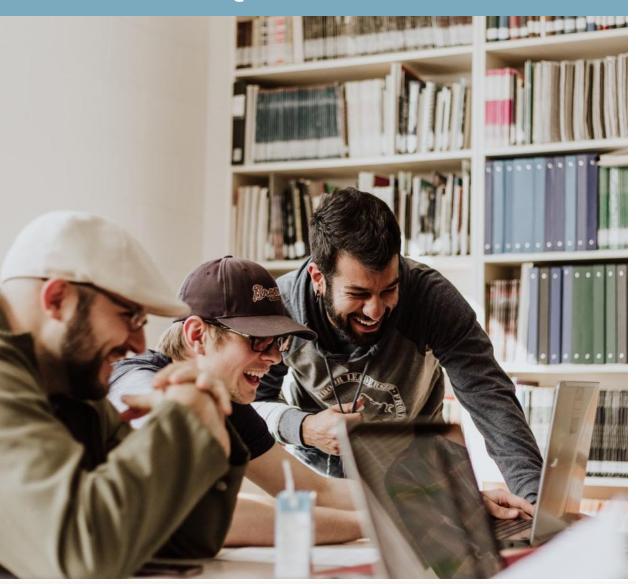








COMMON QUESTIONS



WHAT IS AN EIN?

An Employer Identification Number is like a Social Security Number for an organization. All businesses, associations and clubs should have an EIN. It helps the IRS and other institutions (like OmegaFi and banks) identify your organization and verify it is operating correctly.

WHY DO I NEED AN EIN?

An EIN is required to process payments, establish banking and file your IRS Form 990 each year.

Failure to maintain your EIN and file your 990 could result in penalties form the IRS and stop your dues collection!

WHAT IF I'M NOT SURE IF I HAVE ONE ALREADY?

Ask us for help. We can often check for you. You may also check with your bank, Headquarters or search the IRS website.

COMMON QUESTIONS



IS IT HARD TO OBTAIN AND EIN?

No way! It takes five minutes.

DO I USE MY PERSONAL INFORMATION?

Yes. As an officer or advisor of the organization, you are authorized to complete this form.

I'M NOT SURE I HAVE ALL THE RIGHT INFORMATION.

Don't worry! All you need is to confirm your identity, provide a mailing address and classify your organization the right way. The following slides will show you how to easily do each.

START HERE

Or paste this URL in your browser:

https://sa.www4.irs.gov/modiein/individual/index.jsp

For help or additional information on any topic.

click the underlined key words, or view Help

Topics on the right side of the screen, Make

sure that pop-ups are allowed from this site.



EIN Assistant

Important Information Before You Begin

Use this assistant to apply for and obtain an Employer Identification Number (EIN). Do I need an EIN?

Do I need a new EIN?

About the EIN Assistant

- . You must complete this application in one session, as you will not be able to save and return at a later time.
- . For security purposes, your session will expire after 15 minutes of inactivity, and you will need to start over.
- You will receive your EIN immediately upon verification. When will I be able to use my EIN?
- If you wish to receive your confirmation letter online, we strongly recommended that you install <u>Adobe Reader</u> before beginning the
 application if it is not already installed.

Restrictions

- Effective May 21, 2012, to ensure fair and equitable treatment for all taxpayers, the Internal Revenue Service will limit Employer Identification Number (EIN) issuance to one per responsible party per day. This limitation is applicable to all requests for EINs whether online or by phone, fax or mail. We apologize for any inconvenience this may cause.
- If a third party designee (TPD) is completing the online application on behalf of the taxpayer, the taxpayer must authorize the third
 party to apply for and receive the EIN on his or her behalf.
- The business location must be within the United States or U.S. territories.
- Foreign filers without an Individual Taxpayer Identification Number (ITIN) cannot use this assistant to obtain an EIN.
- If you were incorporated outside of the United States or the U.S. territories, you cannot apply for an EIN online. Please call us at 267-941-1099 (this is not a toll free number).



If you are not comfortable sending information via the Internet, download the <u>Form SS-4 PDF</u> file and the instructions for alternative ways of applying.

IRS Privacy Policy



Help | Apply for New EIN | Exit

What if I do not know what

type of legal structure or

organization to choose?

EIN Assistant

Your Progress: 1. Identify 2. Authenticate 3. Addresses

4. Details 5. EIN Confirmation

Help Topics

What type of legal structure is applying for an EIN?

Before applying for an EIN you should have already determined what type of legal structure, business, or type of organization is being established.

Choose the type you are applying for. If you don't see your type, select "View Additional Types."

Sole Proprietor

Includes individuals who are in business for themselves and household employers.

Partnerships

Includes partnerships and joint ventures.

Corporations

Includes S corporations, personal service corporations, real estate investment trusts (REIT), regulated investment conduits (RIC), and settlement funds.

Limited Liability Company (LLC)

A limited liability company (LLC) is a structure allowed by state statute and is formed by filing articles of organization with the state.

Estate

An estate is a legal entity created as a result of a person's death.

Trusts

All types of trusts including conservatorships, custodianships, guardianships, irrevocable trusts, revocable trusts, and receiverships.

View Additional Types, Including Tax-Exempt and Governmental Organizations
If none of the above fit what you are establishing, there are several others to choose from.

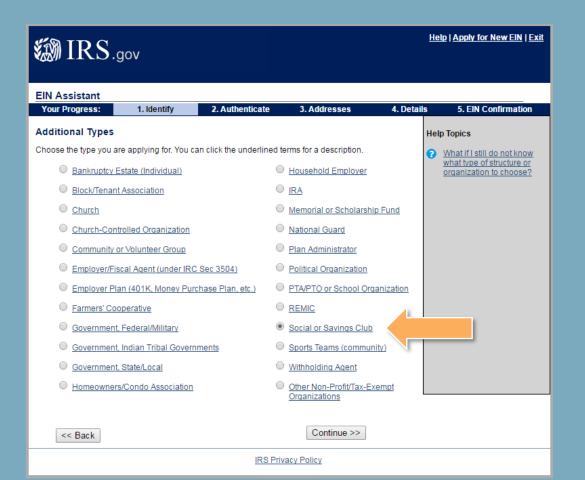
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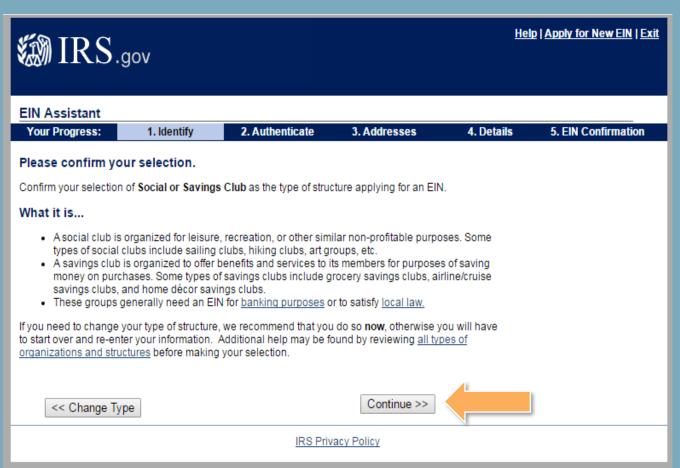
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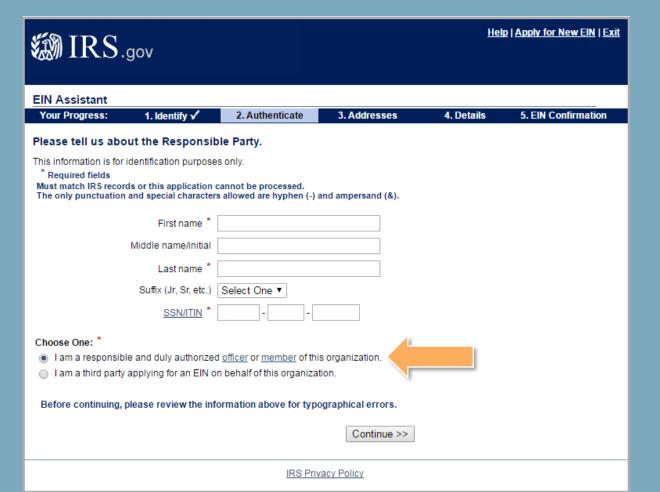
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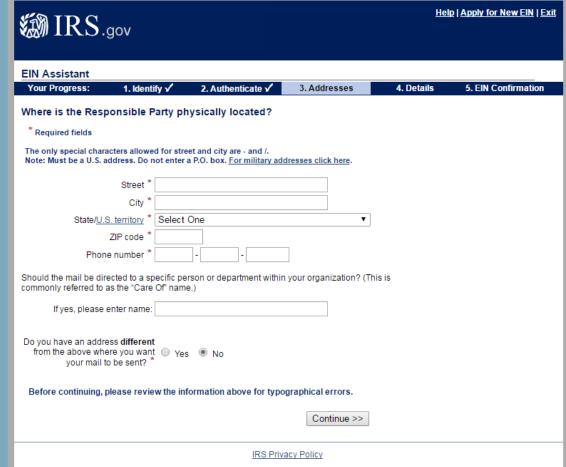


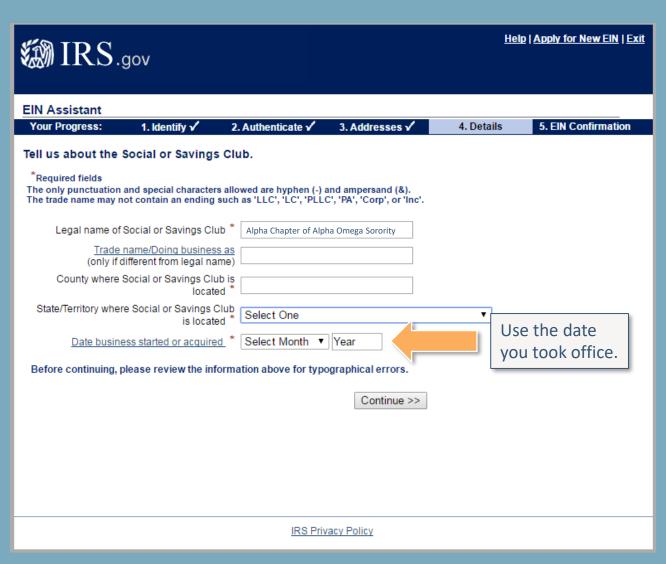
IRS Privacy Policy

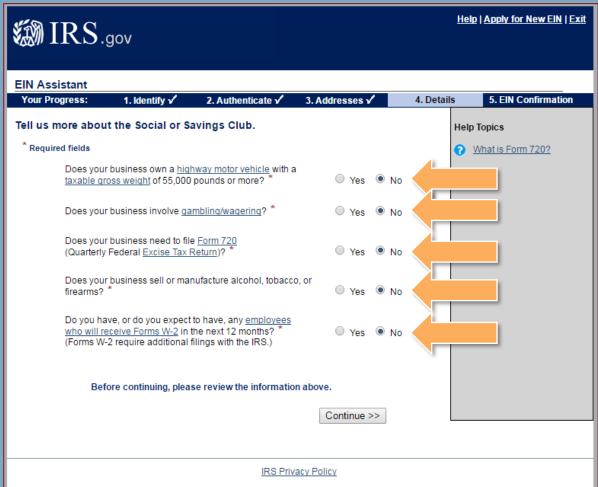










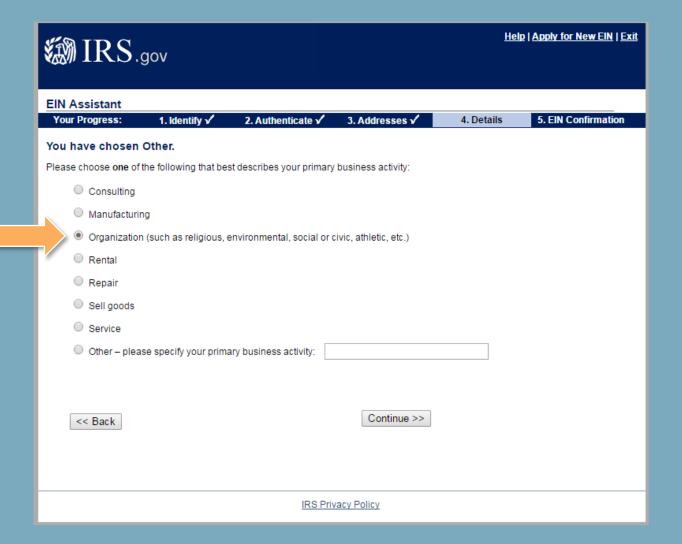


Help | Apply for New EIN | Exit

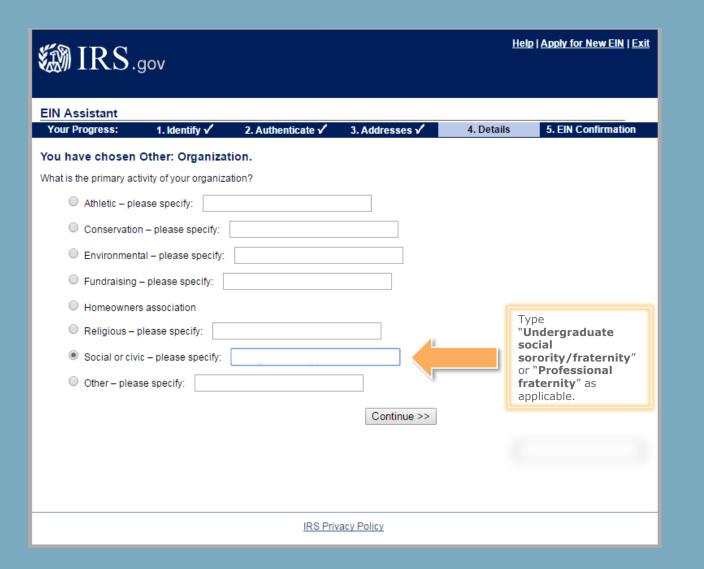


EIN Assistant Your Progress: 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details 5. EIN Confirmation What does your business or organization do? Choose one category that best describes your business. Click the underlined links for additional examples for each category. Accommodations Casino hotel, hotel, or motel. Building houses/residential structures, building industrial/commercial structures, specialty trade contractors, remodelers, heavy construction contractors, land subdivision contractors, or site preparation contractors. Finance Banks, sales financing, credit card issuing, mortgage company/broker, securities broker, investment advice, or trust administration. Retail fast food, restaurant, bar, coffee shop, catering, or mobile food service. Health Care Doctor, mental health specialist, hospital, or outpatient care center. Insurance Insurance company or broker. Mechanical, physical, or chemical transformation of materials/substances/components into new products, including the assembly of components. Renting or leasing real estate, managing real estate, real estate agent/broker, selling, buying, or renting real estate for others. Rental & Leasing Rent/lease automobiles, consumer goods, commercial goods, or industrial goods. Retail Retail store, internet sales (exclusively), direct sales (catalogue, mail-order, door to door), auction house, or selling goods on auction sites. Social Assistance Youth services, residential care facility, services for the disabled, or community food/housing/ relief services. Transportation Air transportation, rail transportation, water transportation, trucking, passenger transportation, support activity for transportation, or delivery/courier service. Operating warehousing or storage facilities for general merchandise, refrigerated goods, or other warehouse products; establishments that provide facilities to store goods but do not sell the goods they handle Wholesale Wholesale agent/broker, importer, exporter, manufacturers' representative, merchant, distributor, or jobber. Other Continue >> << Back

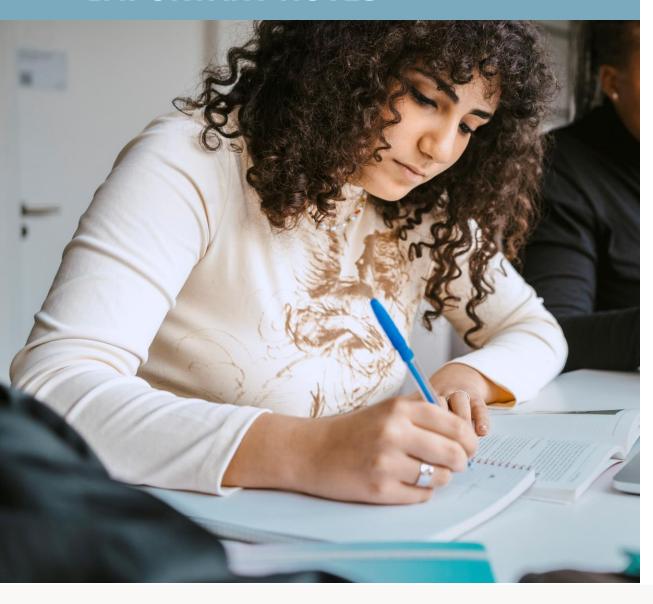
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OMEGAFI | PENNINGTON & COMPANY



IMPORTANT NOTES



RECEIVE ONLINE

Choose to receive your EIN online. And be sure to save the EIN letter the website provides. You can't access it again online and will need to wait for the mail if you don't download and save it now.

SAFE KEEPING

Your EIN is not a secret number. You can share it with your bank, financial provider (like OmegaFi) and headquarters.

Email it to <u>sales@omegafi.com</u> (be sure to include the name of your chapter or association so we can store it in the right place) and we will always have it for you and future officers.