



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 from 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>

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?](#)

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.

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 [Adobe Reader](#) 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).

[Begin Application >>](#)

If you are not comfortable sending information via the Internet, download the [Form SS-4](#) PDF file and the instructions for alternative ways of applying.

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EIN Assistant

Your Progress:

1. Identify

2. Authenticate

3. Addresses

4. Details

5. EIN Confirmation

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.

Help Topics

[? What if I do not know what type of legal structure or organization to choose?](#)

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Additional Types

Choose the type you are applying for. You can click the underlined terms for a description.

- | | |
|---|---|
| <input type="radio"/> Bankruptcy Estate (Individual) | <input type="radio"/> Household Employer |
| <input type="radio"/> Block/Tenant Association | <input type="radio"/> IRA |
| <input type="radio"/> Church | <input type="radio"/> Memorial or Scholarship Fund |
| <input type="radio"/> Church-Controlled Organization | <input type="radio"/> National Guard |
| <input type="radio"/> Community or Volunteer Group | <input type="radio"/> Plan Administrator |
| <input type="radio"/> Employer/Fiscal Agent (under IRC Sec 3504) | <input type="radio"/> Political Organization |
| <input type="radio"/> Employer Plan (401K, Money Purchase Plan, etc.) | <input type="radio"/> PTA/PTO or School Organization |
| <input type="radio"/> Farmers' Cooperative | <input type="radio"/> REMIC |
| <input type="radio"/> Government, Federal/Military | <input checked="" type="radio"/> Social or Savings Club |
| <input type="radio"/> Government, Indian Tribal Governments | <input type="radio"/> Sports Teams (community) |
| <input type="radio"/> Government, State/Local | <input type="radio"/> Withholding Agent |
| <input type="radio"/> Homeowners/Condo Association | <input type="radio"/> Other Non-Profit/Tax-Exempt Organizations |

Help Topics

[? What if I still do not know what type of structure or organization to choose?](#)

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Please confirm your selection.

Confirm your selection of **Social or Savings Club** as the type of structure applying for an EIN.

What it is...

- A social club is organized for leisure, recreation, or other similar non-profitable purposes. Some types of social clubs include sailing clubs, hiking clubs, art groups, etc.
- A savings club is organized to offer benefits and services to its members for purposes of saving money on purchases. Some types of savings clubs include grocery savings clubs, airline/cruise savings clubs, and home décor savings clubs.
- These groups generally need an EIN for [banking purposes](#) or to satisfy [local law](#).

If you need to change your type of structure, we recommend that you do so **now**, otherwise you will have to start over and re-enter your information. Additional help may be found by reviewing [all types of organizations and structures](#) before making your selection.

<< Change Type

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Please tell us about the Responsible Party.

This information is for identification purposes only.

* Required fields

Must match IRS records or this application cannot be processed.

The only punctuation and special characters allowed are hyphen (-) and ampersand (&).

First name *

Middle name/initial

Last name *

Suffix (Jr, Sr, etc.)

[SSN/ITIN](#) * - -

Choose One: *

- ☒ I am a responsible and duly authorized [officer](#) or [member](#) of this organization.
- ☐ I am a third party applying for an EIN on behalf of this organization.

Before continuing, please review the information above for typographical errors.

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Where is the Responsible Party physically located?

* Required fields

The only special characters allowed for street and city are - and /.

Note: Must be a U.S. address. Do not enter a P.O. box. [For military addresses click here.](#)

Street *

City *

State/[U.S. territory](#) *

ZIP code *

Phone number * - -

Should the mail be directed to a specific person or department within your organization? (This is commonly referred to as the "Care Of" name.)

If yes, please enter name:

Do you have an address **different** from the above where you want your mail to be sent? * ☐ Yes ☒ No

Before continuing, please review the information above for typographical errors.

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Tell us about the Social or Savings Club.

* Required fields

The only punctuation and special characters allowed are hyphen (-) and ampersand (&).
The trade name may not contain an ending such as 'LLC', 'LC', 'PLLC', 'PA', 'Corp', or 'Inc'.

Legal name of Social or Savings Club *

[Trade name/Doing business as](#)
(only if different from legal name)

County where Social or Savings Club is located *

State/Territory where Social or Savings Club is located *

[Date business started or acquired](#) *

Before continuing, please review the information above for typographical errors.

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Use the date
you took office.

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Tell us more about the Social or Savings Club.

* Required fields

Does your business own a [highway motor vehicle](#) with a [taxable gross weight](#) of 55,000 pounds or more? * ☐ Yes ☒ No

Does your business involve [gambling/wagering](#)? * ☐ Yes ☒ No

Does your business need to file [Form 720](#)
(Quarterly Federal [Excise Tax Return](#))? * ☐ Yes ☒ No

Does your business sell or manufacture alcohol, tobacco, or
firearms? * ☐ Yes ☒ No

Do you have, or do you expect to have, any [employees](#)
[who will receive Forms W-2](#) in the next 12 months? *
(Forms W-2 require additional filings with the IRS.) ☐ Yes ☒ No

Before continuing, please review the information above.

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Help Topics

[? What is Form 720?](#)

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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.
- ☐ [Construction](#)
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.
- ☐ [Food Service](#)
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.
- ☐ [Manufacturing](#)
Mechanical, physical, or chemical transformation of materials/substances/components into new products, including the assembly of components.
- ☐ [Real Estate](#)
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.
- ☐ [Warehousing](#)
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**

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You have chosen Other.

Please choose **one** of the following that best describes your primary business activity:

- ☐ Consulting
- ☐ Manufacturing
- ☒ Organization (such as religious, environmental, social or civic, athletic, etc.)
- ☐ Rental
- ☐ Repair
- ☐ Sell goods
- ☐ Service
- ☐ Other – please specify your primary business activity:

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You have chosen Other: Organization.

What is the primary activity of your organization?

- ☐ Athletic – please specify:
- ☐ Conservation – please specify:
- ☐ Environmental – please specify:
- ☐ Fundraising – please specify:
- ☐ Homeowners association
- ☐ Religious – please specify:
- ☒ Social or civic – please specify:
- ☐ Other – please specify:

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Type
"Undergraduate
social
sorority/fraternity"
or "Professional
fraternity" as
applicable.

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 sales@omegafi.com (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.