



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 Solicitations 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 \$25,000 or more in the fiscal year of July 1, 2007 to June 30, 2008? 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, 2009**. **A PTA should mail by May 21, 2009** in order to meet the extended due date and avoid a late fee.

- If PTA's gross receipts are \$25,000 or more and your PTA submitted a Charitable Solicitations Renewal Form last year (year-end June 30, 2007), you would fill out the **Charitable Solicitations Registration/Renewal Form** this year. There is a \$10.00 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 1st) prior to the due date shown on the form.
- If your gross receipts are \$25,000 or more, and your PTA submitted an Optional Statement for an Exempt Organization last year, you would fill out the Charitable Solicitations Registration/Renewal Form this year. There is a \$20.00 filing fee. The application can be obtained by contacting the Charities Program or can be downloaded from their website at http://www.secstate.wa.gov/assets/charities/Charities_Initial_Renewal.pdf
- Remember, if this year you did not gross \$25,000 but your PTA might next year, then you should fill out the Charitable Solicitations Registration/Renewal Form and pay the appropriate fee (see instructions above).

OR

- If your gross receipts are **UNDER** \$25,000, you may fill out the **Optional Statement for an Exempt Organization Form**. The filing fee is \$20.00 for initial submissions and \$10 for updates. The statement can be obtained by contacting the Charities Program or can be downloaded from their website at <http://www.secstate.wa.gov/documentvault/OptionalStatementforanExemptOrganization-2055.pdf>

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

If you have any questions, please contact Pat Nelson at the State PTA office for assistance. You can reach Pat at (253) 565-2153 or 1-800-562-3804 or email pnelson@wastatepta.org.

activities for children and youth.

Section 5: New Entities and /OR First Time Filers Only:

11. Required information and/or First Time Filers Only:

1. Attach a copy of your 501(c)(3) or 501(c)(4) Letter of Determination
2. A PTA would enter N/A if they do not have any specific named beneficiaries.
3. The end fiscal date is **June 30, 20__** __.
4. N/A
5. N/A

SECTION 6: Financial Information for Preceding Fiscal/Accounting Year:

(New organizations that have not completed first fiscal year, skip Section 6, and proceed to Section 7)

12. HAS YOUR ORGANIZATION CONDUCTED SOLICITATIONS?

Check the YES box.

13. DID THE PTA SUBMIT A FEDERAL TAX RETURN?

If **YES** check the appropriate box in the next section.

If **NO**, check the box **Annual gross receipts less than \$25,000**. A Council who grosses more than \$25,000 because of membership service fees will need to attach a statement. "We are not required to file an IRS federal return because the \$25,000 threshold does not include membership fees collected by a council for its parent organization (see IRS REV Ruling 73-364)."

14. IF YOU FILED AN IRS FORM 990 or 990 EZ:

Attach a copy of the IRS Form 990 or 990 EZ, Schedule A (if your PTA is a 501c3, send all 7 pages) and all attachments.

15. SOLICITATION REPORT:

Please **DO NOT COPY** last year's formula when completing this Section.

Fiscal/Accounting year beginning: **July 1, 2007**.

Fiscal/Accounting year ending: **June 30, 2008**.

Line 1 would be the sum of lines 1, 6a and 7a on Part I of IRS Form 990EZ.

(or) the sum of lines 1e, 9a, and 10a on Part I of IRS Form 990

Line 2 would be the sum of lines 2, 3, 4, 5c and 8 from Part I of IRS Form 990EZ.

(or) the sum of lines 2, 3, 4, 5, 6c, 7, 8d and 11 on Part I of IRS Form 990

Line 3 would be the sum of lines 6b, 7b and 9 from Part I of IRS 990EZ.

(or) the sum of lines 9b, 10b and 12 from Part I on IRS Form 990

Line 4 would be line 32 From Part III on IRS Form 990EZ

(or) the sum of lines 13 and 16 from Part I on IRS Form 990

Line 5 would be the sum of line items on Part I 6b, 7b and 17, **minus the amount reported on line 32** from Part III on IRS Form 990EZ

(or) the sum of lines 9b, 10b, 14, and 15 from Part I on IRS Form 990

Line 6 would be the sum of line items 6b, 7b, and 17 from Part I on IRS Form 990EZ

(or) the sum of lines 9b, 10b, and 17 from Part I on IRS Form 990

Line 7 would be line item 25 (column A) from Part II on IRS Form 990EZ.

(or) line 59, column A from Part IV (page 4) on IRS Form 990

Line 8 would be line item 25 (column B) from Part II on IRS Form 990EZ.

(or) line 59, column B from Part IV (page 4) on IRS Form 990

If you do not have anything reporting on Line 32 in Part III for the Form 990 or 990EZ or require assistance determining how to allocate Line 1e from the Form 990, please contact the Charities Program for assistance.

Section 7 FINANCIAL CONTACT INFORMATION:

16. The name, telephone number and email address., if any, of the person who is completing this Form.

Section 8 TYPES OF SOLICITATIONS:

17. Check as many boxes as apply which best describe the ways in which the PTA promoted its fund raising activities.

Section 9 THREE HIGHEST PAID OFFICERS OR EMPLOYEES: 18.

N/A on all lines if your PTA had no paid employees.

Section 10 Current Officers Accepting Responsibility for the Charitable Organization:

19. List two officers and attach an additional sheet with the other board members information.

Section 11 Person or entity that prepares, reviews, or audits financial information:

20. List the name of person or persons that prepares the financial information being reported.

Section 12 Is the organization registered to fundraise outside of Washington State:

21. A PTA would normally check NO.

Section 13 Legal Actions, if any:

22. If YES provide the information of the legal actions.
if NO, check the box.

Section 14 Commercial Fundraisers

23. This would normally be NO.

Section 15 Alternate Address (s)

24. A PTA would not have any thing in this section.

Section 16 Signature

25. An officer must sign and date this Renewal Form.

Submit the completed registration form—by May 31, 2009.

The completed Charitable Solicitations Registration/Renewal Form or statement and a check in the appropriate amount made payable to the **State of Washington** should be sent to the address below. (**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.

**Office of the Secretary of State
Charities Division
PO Box 40234
Olympia WA 98504-0234**

NOTE: Submissions received (not postmarked) after the due date shown above will be assessed a \$50 late fee. Please allow 7-10 days for postal delivery and receipt validation. **Mail by May 21, 2009 to avoid a late fee.**

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

NOTE: Please keep your Postcard for next year. When you have completed your **2008** 990EZ then you may go online and complete the Charitable Solicitations Registration/Renewal Form. This Postcard has your Name and Registration Number.

If you have any question, please contact the Charities Program at their phone number of (800) 332-4483 extension "0" or email the Charities Program at Charities@secstate.wa.gov. You will need to give your **Charitable Registration Number**.