Top Ten Tips to shorten the tax-exempt application process

Following these simple tips can save time and effort

10. **Provide the required information on the principal officers and board of directors.** List the following information for the principal officers and board of directors:
   - a) Names; b) Mailing addresses; c) Titles and Positions; d) Annual compensation

9. **Ensure a director, trustee, principal officer or other authorized individual signs the Form 1024-A.** Generally, a principal officer is the president, vice president, secretary or treasurer. The person signing the application must indicate his or her title or other authority to sign. A taxpayer's representative may not sign the application. Form 1024-A must be electronically signed on [www.pay.gov](http://www.pay.gov).

8. **Don't forget to submit a copy of adopted by-laws, code of regulations or any other document that sets out the organization's rules of operation, but only if adopted.**

7. **Include all of the necessary financial data.**

6. **Include the month the organization's annual accounting period ends.** The accounting period ending date on the application should match the date stated in your by-laws, on financial statements, and on any prior returns filed.

5. **Attach all required schedules.** Some lines require supporting schedules. Check all line items on financial statements.

4. **Complete all required pages.** The information contained on each of Form 1024-A is necessary for the IRS to make a determination about your tax-exempt status.

3. **Provide enough information about the organization's activities to show us how it will achieve the exempt purpose.** Please don't restate the purpose. Explain the specific activities that will achieve that purpose. Consider a "who, what, when, where, why and how" approach. Explain past, present, and planned activities. If you haven't started activity yet, develop plans that provide a clear understanding of how your organization will operate. It is not necessary to describe activities that are speculative at this time.

2. **Attach a complete copy of the organizing document and all amendments.** If the applicant is a corporation, include a complete copy of the articles of incorporation that shows it has been filed with and approved by the state. If the applicant is not incorporated, include a similar organizing document such as a constitution, articles of association, or by-laws. At a minimum, it should state the legal name, the purposes and the date of adoption. At least two members of the organization should sign the document. A trust document must be signed by the trustees and show the date of formation.

1. The **Number 1 tip to reduce delays in processing exempt organization applications is...** **INCLUDE THE CORRECT USER FEE!** Pay the correct [user fee](#) for Form 1024-A on Pay.gov using a bank account, debit card or credit card.

Following these ten tips can help shorten the time it takes to process an application for tax-exempt status. A correctly completed application, sent with all required documents and schedules has a good chance of being accepted with no further contact. If contact is necessary, the IRS agent can address the technical issues that need resolution without taking up time to get a completed application.