

# FORMING A NONPROFIT IN OHIO – SCORE Checklist

## RESEARCH THE INFORMATION NECESSARY TO FORM YOUR NONPROFIT

- 1) Read Forming a Nonprofit Corporation ([www.citmedialaw.org](http://www.citmedialaw.org)).
- 2) Read Guide to Nonprofit Organizations in Ohio ([www.sos.state.oh.us](http://www.sos.state.oh.us))
- 3) Read Forming a Non Profit Corporation in Ohio ([www.citmedialaw.org](http://www.citmedialaw.org))
- 4) Review Application for Recognition of Exemption - IRS form 1023 ([www.irs.gov](http://www.irs.gov))
- 5) Prepare a Nonprofit Business Plan

## SEARCH FOR AN ATTORNEY AND CERTIFIED PUBLIC ACCOUNTANT WHO WILL PROVIDE PRO BONO SERVICES

A SCORE counselor does not provide legal advice. You may have questions regarding legal or accounting issues that are beyond the scope of your SCORE counselor. It is recommended that an attorney and a CPA should be on your Board of Directors.

## BEGIN FORMING YOUR NONPROFIT

- 1) Create your Mission Statement
- 2) Create a fundraising plan.
- 3) Prepare a 3 year financial forecast/budget
- 4) Incorporate your nonprofit organization
  - Create your name and check for availability and reserve name ([www.sos.state.oh.us](http://www.sos.state.oh.us))
  - Check/reserve Domain name for website
  - Recruit and appoint directors
  - Prepare and file Articles of Incorporation ([www.sos.state.oh.us](http://www.sos.state.oh.us))
  - Create by laws
  - Hold an organizational meeting
  - Keep a records book
  - Obtain your Employer Identification Number ([www.irs.gov](http://www.irs.gov))
  - Apply for Tax Exemption to be a 501c3 –Application for Recognition of Exemption ([www.irs.gov](http://www.irs.gov))
  - Create a website
  - Register with Ohio’s Attorney General ([www.ag.oh.us](http://www.ag.oh.us))
    - Register only after you have received your approval to be a 501c3 from IRS.
    - File: Charitable Trust Registration Form (CFR-1)
    - Charitable Organization Registration Statement (CORS)
  - Open a bank account
  - Apply for a Nonprofit Postal Permit
  - Obtain Insurance for organization and directors
  - Payroll/taxes/Ohio/Federal