Office of the Secretary of State
Corporations & Charities Division

Charitable Trust Application Check List

Each question must be completed and all required attachments must be included with your application. The items in the checklist below are the most common reasons initial registrations are rejected. Please use the checklist to prevent any delay in processing your submission.

Application

☐ Please print legibly in ink. Do not staple or bind documents.

☐ Ensure each question is answered. If the question does not apply, please mark it as "NA."

☐ You must include the acronym "PMB" in the mailing address field if using a Private Mail Box.

☐ If mailing address is a PO Box or Private Mail Box (PMB), you must provide a street address in the "street address" field.

☐ Report all financial information for the trust's most recent fiscal/accounting year-end on the Financial Report (Section 4) ***only*** if an IRS Form 990/990PF/990EZ was not submitted to the Internal Revenue Service for that time period.

☐ Please complete **Section 6** if your organization wishes to be included in the Charitable Trust Directory.

☐ Sign the application. It must be signed by the Trustee or comparable officer. In the absence of trustees/officers, the person responsible for the organization may sign the application.

Required Attachments
(Please label attachments accordingly)

☐ A photocopy of the organization's IRS Determination Letter, if Federal tax-exempt status has been granted.

☐ A photocopy of the organization's IRS Federal Return (990/990EZ/990PF) for the preceding fiscal or accounting year (including all schedules and attachments, **EXCEPT** Schedule B Contributors List, Capital Gain/Loss Statements, Bank Statements or Stock Statements.)

☐ A photocopy of the organization's most current, signed trust instrument (e.g. Articles of Incorporation, Trust Agreement, Last Will and Testament, Probate Order), and any subsequent amendments.

☐ $25.00 filing fee. Make checks payable to the **"**State of Washington**."**

☐ Additional $50.00 "Expedite fee" if priority processing is requested.

Please Do Not Attach or Mail the Following Items

- Schedule B – Contributors List, Capital Gain/Loss Statements, Bank Statements or Stock Statements.
- By-Laws
- Bound reports or publications

Please note that the application and all attachments are subject to public review. **Do Not** provide social security numbers, bank account information, or any other information not requested that you do not wish to make available to the public.

Please contact the Trust Program at (360) 725-0378 or trustinfo@sos.wa.gov if you have any questions or require assistance.

Print Form