



## Charity Optional Amendment

**Purpose:** An amendment is submitted for organizations that need to correct or change information that has previously been recorded with our office. The most common reason a charity optional amendment is submitted is for an organization to change its fiscal year on record or if a charity registration has determined it is no longer required to be registered and chooses to continue its registration with the Charities Program. Per [WAC 434-120-045](#) a charity is required to submit changes within 30 days of the changes taken place.

All information, except the financial information, will be pre-populated. The organization may update the pre-populated information as needed. Below are instructions for what is required in each section if updating is needed.

If there are issues submitting the Charity Amendment, please review our Online Instructions Frequently Asked Questions on our website at: <https://www.sos.wa.gov/charities/> If additional assistance is needed you may contact our office by emailing charities at: [charities@sos.wa.gov](mailto:charities@sos.wa.gov)

- **Qualifier questions:** Answer yes or no to all questions and check that “All information is true and accurate”. Once this is done select continue. If you qualify for an optional registration, you will be brought to the optional registration online form. If you do not qualify for an optional registration the system will bring you to a charity amendment. The instructions below can be used for both an optional and a charity amendment
- **Organization Name:** Provide the organization’s name. If the organization provides a UBI Number (9-digit Unified Business Identifier) that is recorded with the Secretary of State Corporations Division, the name **must** match the business name on record.
- **FEIN (Federal Employer Identification Number):** Provide the organization’s FEIN. If the organization does not have a FEIN, you can apply at <https://www.irs.gov/> **A FEIN is required for registration with the Charities Program.**
- **UBI Number:** Is a 9-digit number issued by several state agencies (L&I, ESD, DOR-BLS etc.) which allows the organization to do business in Washington State.
- **Also Known As “AKA” Name(s):** Provide all names that the organization uses for solicitation.
- **Federal Tax Exempt Status:** If the organization has received a federal tax exempt status from the IRS select “Yes”. The organization will need to upload its IRS determination letter that was provided from the IRS. If the organization does not have the IRS determination letter you may upload a statement attesting that the organization has been provided this status from the IRS. If the organization is a part of a **Group Exemption**, a letter from the central organization confirming its relationship with the registering organization is required to be uploaded with a copy of the central organization’s IRS determination letter.
- **Is this Charitable Organization associated with any Corporation or LLC?:** If the organization is registered as a Nonprofit Corporation, Limited Liability Company, or a Profit Corporation in a state or country other than Washington State select “Yes” and select the jurisdiction where the organization is currently incorporated. If the jurisdiction is Washington State the UBI will be required to be provided.
- **Purpose of the Organization:** Provide the organization’s purpose/mission. If the purpose is longer than 500 characters; provide as much of the purpose as able and then upload the full purpose as an attachment in the “upload additional documents” section at the bottom of the online form.
- **Organization name look up:** The organization name will be pre-populated; if the name has changed select “look up” to ensure the new organization name is available.



- **Organization email:** Provide the email address for the general public to be able to contact the organization. Confirm the email address by entering again in the confirm organization email section. This email address will also receive notifications from our office.
- **Organization website:** If the organization has a website enter it the format of [www.website.com/org/net](http://www.website.com/org/net).
- **Phone number:** Provide the phone number for the general public to be able to contact the organization, this may include an extension if applicable.
- **Mailing address:** Provide the mailing address of the organization. If outside of the united states, the country can be selected from the drop down menu. The screen parts will adjust to the country that is selected.
- **Street address:** Provide the physical address of the organization. If the same as the mailing address you may select the check box to autofill the street address. The street address cannot be a PO Box or PMB. If the organization does not have a physical address provide the zip, city, and state. If the state is Washington, the organization will need to provide the county as well.
- **Do you use any other addresses for solicitation:** If the organization uses different address(s) for solicitation from the mailing/street address select “Yes” and upload a list of the other addresses used.
- **Financial information:** If previously recorded dates need to be updated due to the organization not reporting a change of fiscal year when it occurred and erroneously reporting the wrong fiscal year. A statement outlining when the fiscal year was changed and which fiscal year dates are being amended will need to be uploaded to the “upload additional documents” section of the online form. You may also contact our office at [charities@sos.wa.gov](mailto:charities@sos.wa.gov)
  - 1) If amending financial information from a previously recorded fiscal year select the “edit” button next to the fiscal year in the financial history grid. Once selected the financial fields will appear to then be edited. Please note that the organization may not change the fiscal dates previously recorded unless a statement regarding the error has been submitted in the “upload additional section”.
  - 2) If needing to update the fiscal year as currently recorded with our office select “Yes” under the financial information section. The new accounting year will need to be provided, then the organization’s short report and financial fields will appear. Examples for the short report dates are shown below.
    - **Example 1:** *If the organization’s accounting year was 1.1 to 12.31 and is changing to 7.1 to 6.30 then the Short Report should be 1.1 to 6.30*
    - **Example 2:** *If the organization’s accounting year was 7.1 to 6.30 and is changing to 1.1 to 12.31 the Short Report should be 7.1 to 12.31*
    - **Example 3:** *If the organization’s accounting year was 1.1 to 12.31 and is changing to 10.1 to 9.30 the Short Report should be 1.1 to 9.30*
- **Solicitation comments:** If necessary, provide additional information regarding the financial figures reported in the solicitation report.
- **Did the organization solicit or collect contributions in WA during the accounting year reported?:** If the organization solicited or collected contributions in Washington State select “Yes” and indicate the types by selecting all that apply. If “Yes” a minimum of one type must be selected.
- **Is the Organization registered to fundraise outside of WA?:** If the organization is registered to fundraise in other states select “Yes” and provide the states and countries.



- **Does the organization pay any of its officers or employee?:** If the organization pays any officers or employees select “Yes” and provide the first and last name of up to three people receiving the highest compensation. If there are no paid employees select “No”.
- **Persons accepting responsibility:** A minimum of one person or officer accepting responsibility for the organization must be provided. Please enter each person’s name, title, phone number, and address. If the person’s address and phone number are the same as the organization’s mailing address select “contact information same as organization” and this information will be pre-populated for you. After entering the information select “add new officer”, the name will be added to the persons accepting responsibility grid. You may follow these steps to add each person needed. Please enter each name needed and do not upload a list.
- **Financial Preparer:** If financial information has been provided the system will require a financial preparer. Select if the financial preparer is a business or an individual. Provide all information, business name if applicable, first and last name, title, and address.
- **Legal Information:** *Legal Actions include any **administrative** or **judicial** proceedings alleging that the organization or any individual in its registration has failed to comply with these rules, [RCW 19.09](#), or state or Federal laws pertaining to taxation, revenue, charitable solicitation, or record-keeping, whether such action has been instituted by a public agency or a private person or business.*
  - Provide the court’s jurisdiction, case number, title of legal action, and the date of legal action then select “add legal information”. Multiple legal information can be provided. For each legal action upload the court documents under this section.
- **Does the Organization use one or more Commercial Fundraisers to solicit contributions in WA?:** If the charity uses a commercial fundraiser to solicit on its behalf select “Yes” and search for the commercial fundraiser. If there is not a result for your search you are able to add the commercial fundraiser information. Our office does not record the relationship between a charity and a commercial coventurer or fundraising counsel/consultant. The definition of a commercial fundraiser, commercial coventurer, and fundraising counsel/consultant can be found under [RCW 19.09.020\(4\)\(5\)\(10\)](#).
- **Return Address for this Filing:** If provided, the confirmation regarding this specific filing will be sent to this address, in addition to the organization’s mailing address.
- **Upload additional documents:** This section is used to upload additional documents as needed. Our office does not require a charity’s federal tax document.
- **Signature/Attestation:** Select the box next to “by executing this document, the applicant certifies the following”. Provide the first and last name and a contact phone number.
- When completed you will be able to select continue and be brought to a review screen, confirm that all information is correct and then select add to the cart.
- Once at the shopping cart please select the organization’s submission and select check out, you will then be able to select “proceed to checkout”.
- Once at the checkout screen provide the payment information and place your order.
- There are no additional processing fees for using our online filing system when filing charities documents. Once the registration is completed, either automatically or once it is reviewed by a charities team member, you will be able to access the organization’s confirmation letter and file stamped documents under the “notices and filed documents” tab on the user dashboard.