

Charitable Organization Registration in Oklahoma Information & Instructions

Oklahoma Secretary of State, 2300 N. Lincoln Blvd., Room 101, Oklahoma City, OK 73105-4897
Telephone: (405) 521-3912

The Oklahoma Solicitation of Charitable Contributions Act in Title 18 of the Oklahoma Statutes applies to any charitable organization which shall solicit or accept contributions from any person in Oklahoma by any means, except those specifically exempt under Section 552.4. (See reverse side of this instruction sheet.) This information is intended to assist with the **REGISTRATION** of a charitable organization in Oklahoma pursuant to the provisions of the Act. **Please consult the act carefully.**

REGISTRATION PROCEDURE

PREPARE and **SUBMIT** to the Secretary of State:

1. One (1) **original** copy of the fully completed **registration statement**, signed and acknowledged by a party duly authorized to sign on behalf of the charitable organization. The copy will be stamped "Filed" by the Secretary of State and returned to the sender as evidence of registration.
2. One (1) "**Professional Fund Raiser Information**" **Attachment** form for **each** professional fund raiser or fund raising counsel with which the charitable organization has entered into an agreement or contract.
3. One (1) copy of **Internal Revenue Form 990** as filed by the charitable organization for the most recently completed fiscal year; or, for the initial registration of a newly formed organization, a copy of a letter from the Internal Revenue Service, or other evidence, showing the tax exempt status of the charitable organization.
4. One (1) complete **list of the name, street address and title or position of each officer, including each principal salaried executive staff officer, each director, and each trustee** of the charitable organization.
5. One (1) copy of **ALL contracts or other agreements** entered into with any professional fund raiser or fund raising counsel relating to financial compensation or profit to be derived by the fund raisers or fund raising counsel.
6. One (1) **original**, fully completed **financial statement** signed and acknowledged by a party duly authorized to sign on behalf of the charitable organization.
7. A check or money order in the amount of **\$15.00** made **payable to the Secretary of State** in payment of the registration fee.

REGISTRATION INFORMATION

NAME: No charitable organization shall: (1) use the name of any other person (except that of an officer, director or trustee of the charitable organization by or for which contributions are solicited) without the written consent of such person; and, (2) use a name so closely related or similar to other charitable organizations or governmental agencies or subdivisions that the use thereof would tend to confuse or mislead the public. (18 O.S., Section 552.11)

REGISTRATION RENEWAL: A registration is valid for a period of **one (1) year** from the date of filing with the Secretary of State and **MUST** be renewed annually. A renewal registration statement may be submitted in the same manner as the organization's initial registration (as outlined above) **on or before the anniversary of its registration**. Renewal notices are NOT automatically mailed to the organization. Forms may be ordered by contacting the Secretary of State's office at 405-521-3912.

REGISTRATION UPDATES: If any information in the registration or renewal statement of a charitable organization has changed, making the registration statement inaccurate in any respect, the organization may **submit an updated statement** with the Secretary of State to correct such information. An updated registration statement shall specify **ONLY** the information to be updated upon the records of the Secretary of State. The updated statement shall be executed in the same manner as an initial registration statement, submitted in duplicate and accompanied by a \$15.00 filing fee. Please contact this office for forms to update a registration statement.

PLEASE NOTE: Title 18 Oklahoma Statutes, Section 552.4 pertains to persons and organizations that are **exempt from the requirement to register with the Secretary of State**. Be advised that this office **CANNOT** make the determination as to whether a person or organization conforms to one of the exemptions listed. That decision is the responsibility of the organization.

IF the organization determines that it is exempt from the requirement to register with the Secretary of State, it may **SUBMIT** a letter stating so and shall include the basis of such determination.

Title 18, O.S., Section 552.4. Persons and organizations exempt

Except as otherwise specifically provided in this act, the provisions of Sections 552.3 and 552.5 of this title shall not apply to the following persons:

- (1) Organizations incorporated for religious purposes and actually engaged in bona fide religious programs, and other organizations directly operated, supervised, or controlled by a religious organization;
- (2) Educational institutions which have a faculty, regularly enrolled students and offer courses of study leading to the granting of recognized degrees when solicitations of contributions are confined to its student body and their families, alumni, faculty and trustees;
- (3) Fraternal organizations, when soliciting from their own members, and patriotic and civic organizations, when solicitation of contributions is confined to the membership of said organizations, and the solicitation is managed by their own membership without paid solicitors;
- (4) Persons soliciting contributions for a named individual person, when such individual person is specified by name at the time of solicitation, the purpose for such contribution is clearly stated, and if the gross contributions collected, without any deductions whatsoever for the benefit of the solicitor or any other person, be deposited directly to an account in the name of the beneficiary established for that purpose at a licensed local bank, and if such contributions are used for the direct benefit of the named individual person as beneficiary; and
- (5) Any organization which collects from charitable solicitations less than Ten Thousand Dollars (\$10,000.00) per year.

FEE: \$15.00

PRINT CLEARLY

Registration Statement of Charitable Organization

Initial Registration

Renewal

Update

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1a. The legal name of the charitable organization:

1b. The organization's employer identification number:

2. Any other name the organization may be identified as or known as, and any distinctive names the organization uses for the purposes of public solicitation of contributions:

3a. The organization is a: corporation partnership other legal entity _____

3b. When & where was the organization formed to do business?

Month, day, year _____ State/Country _____

3c. Fiscal year ends month/day:

4a. The street address of the charitable organization:

Street _____ City _____ County _____ State _____ Zip Code _____

4b. The mailing address of the charitable organization, if different:

5. The principal business telephone number (include area code):

6. The purposes for which the contributions solicited or accepted are to be used:

(No contribution or any portion thereof shall enure to the private benefit of any voluntary solicitor.)

7. The name and street address of the person who will have custody of the contributions:

8. The name and street address of the person(s) responsible for the distribution of funds collected:

9. The period of time during which such solicitation is to be conducted:

10. A description of the specific method or methods of solicitation:

personal contact direct mail telephone

television radio other _____

11. Solicitation will be conducted by: voluntary, unpaid solicitors paid solicitors both

12. **IF** your organization contracts with or otherwise engages the services of any outside fund raising professional (such as a “professional fund raiser,” “paid solicitor,” “fund raising counsel,” or “commercial co-venturer”) the information listed on the page titled “**Charitable Organization Registration Attachment: Professional Fund Raiser Information**” of this form **must** be submitted for **each professional** with this application.

REQUIRED ATTACHMENTS

13. A copy of Internal Revenue Form 990 as filed by the charitable organization for the most recently completed fiscal year; or for the initial registration of a newly formed organization, a copy of a letter from the Internal Revenue Service, or other evidence, showing the tax exempt status of the charitable organization.

14. A complete list of the names, street addresses, and title or position, of **each** officer, including each principal salaried executive staff officer, director, and trustee of the charitable organization.

EXECUTION AND ACKNOWLEDGMENT

I, the undersigned, being duly authorized to sign on behalf of the charitable organization named herein, have caused this application to be executed this _____ day of _____, _____; and that the contents of the application and each supporting document are true, to the best of my knowledge, and complete.

Signature of President, Chairman or Principal Officer

Type or Print Name

Title

**CHARITABLE ORGANIZATION REGISTRATION
ATTACHMENT
Professional Fund Raiser Information**

(Complete one (1) form for each professional fund raiser. Form may be duplicated.)

a. Legal name of outside fund raising professional:

b. Street & P.O. box address _____

c. Telephone number (including area code): _____

d. Location of offices used by them on behalf of your organization

e. Simple statement of services provided

f. Describe the basis of payment and nature of the arrangement. A copy of the contract or other agreement **MUST** be attached. ***“See contract”*** is **unacceptable** for description.

g. Does the professional solicit on your behalf? yes no

h. Does the professional have custody or control of donations at any time? yes no

i. Specific amount or percentage of compensation **paid or to be paid** to the professional fund raiser:

j. Property of any kind or value **paid or to be paid** to the professional fund raiser:

k. Percentage value of compensation paid to the professional fund raiser as compared to the:

(1) Total contributions received: _____

(2) Net amount of total contributions received: _____

Charitable Organization Financial Statement

NOTE: Every charitable organization which has received contributions during the previous calendar year SHALL file a financial statement WITH its initial registration, and WITH each annual renewal, thereafter, which contains the most recent information as follows. This form must also be signed and acknowledged.

1. The legal name of the charitable organization:

2. The street address of the charitable organization:

Street	City	County	State	Zip Code
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3. The telephone number of the charitable organization:

4. This report is for the calendar or fiscal year ending:

4a. The gross amount of the contributions collected:

4b. The gross amount of the contributions pledged:

5a. The gross amount **given to** the charitable purpose represented:

5b. The gross amount **to be given** to the charitable purpose represented:

6a. The aggregate amount **paid** for the expenses of such solicitation:

6b. The aggregate amount **to be paid** for the expenses of such solicitation:

7a. The aggregate amount **paid** to professional fund raisers and solicitors:

7b. The aggregate amount **to be paid** to professional fund raisers and solicitors:

EXECUTION & ACKNOWLEDGMENT

I, the undersigned, being duly authorized to sign on behalf of the above named charitable organization, have caused this financial statement to be executed this _____ day of _____, _____; and that the contents of this statement and any supporting document(s) are true and, to the best of my knowledge, complete.

Signature of President, Chairman or Principal Officer

Print or Type Name