**Dear Fiscal Sponsorship Applicant**:

The “***Economic Empowerment Foundation for Exempt Startups & Small Businesses (EEF-501c) ™”*** officially began in 1998 as telnet help to her personal server to online classmates looking for software access to complete homework & project assignment when she returned to complete a BS CIS/Net Engineering. It quickly included some instructors who needed computer access for lesson planning and other tasks. In the early days of online education academia didn’t provide the online student/instructor population with technology access of any kind, even as well-funded institutions. So this access morphed into a multi-year pilot project that in Sept 2002 officially became ***ED-Lab Online*** an Application Service Provider (**now called** *Cloud Computing/SaaS*) for online Student & Instructors of HBCUs, MSIs (Minority Serving Institutions), Community Colleges & VocEds. To keep itfree its founder began doing job training/room rentals in her apart and called it “***The Learners Lab”*** our original name***.***

Now more than 22 years since ED-Lab became official even with new names for ***EEF-501c™*** and the 501c Business Incubator Council, remain the first & only economic, professional & small business development business, public charity & single source path to business assets resources for the 501c Startup, Entrepreneurs and Small Business.

And ED-Lab Online, it’s been resurrected to serve as the Biz Incubators Training Hub for its Tech Volunteers, for Interns & Fellows enterprise wide, and for our subHUB Entrepreneurs wanting to learn Govt Contracting.

Why, because we are who we help and we help who others won’t.

We also work from the ground up to solve our own challenges and do the same for those we help. It’s why our insights are unique and our instincts spot on making our fiscal sponsorships seamless. True sponsorship should be what you need, how you need it not what someone feels like doing for a quick payday. With us, you ask and we’ll work to make it happen, tell you when we can’t, and get help when we need.

**Approvals are not automatic. We reserve the right NOT to Approve Applications determined to present a Conflict of Interest of any type or level for *Us* as a gap-filling, self-empowerment entrepreneurial business development incubator, or any entity/program within our growing network of charitable endeavors, whose vetting reveals questionable activities, foreign ownership/control, false/fraudulent information or any like occurrence**.

Thank you so much, and stay safe!



EEF-501c Founder, CEO, Chair

501c-BizIncubator Council Founder & President

/Corporate Office

/Board & ResAgent Files

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# Announcements

**April 30, 2025**

This is unusual but necessary. We have two executive decisions have been implemented which more than double the size of this document plus an FYI we are sharing.

***First*** is the inclusion of a ***reject prevention section*** into our Fiscal Sponsorship Applications. ***Second*** is ***extending*** Grant & Donation Processing Offerings. ***FYI***: our search is on to replace interim HQ space. The multi-floor space was donated but its owner is among many whose contracting venues was suddendly defunded amidst the ongoing political environment.

Reject Prevention Alerts!

We are seeing and learning of so many setbacks of F1023/1024 Applications for Tax Exemption we’ve decided to run the risk of annoyance to include ***ALERT*** information with examples we know will either prevent our Awardees from acting on or continuing to facilitate that can get them in trouble with their home State, or denied exemption by the IRS.

We know others are facing, including those who have asked for our advice then not listening to the compliance requirements our responses are based upon because word gets back to us even though they are not Awardees.

Extension of Grant and Donation Processing

The IRS has always experienced delays in its processing however, it has not been successful in overcoming then catching up to the delays initially triggered in early 2017 by the reallocation of funds to build the Wall, already behind when the COVID lockdown happened, persistent delays even with mods to their processes have extended their completion times well beyond published timeframes.

We’re seeing and experiencing EXTENSIVE delays plague the IRS in a great many areas especially in Exemption processing from incoming applications to the most basic of task like updating records when a business’s name changes.

|  |  |  |
| --- | --- | --- |
| We changed our business name in Feb that is a State controlled function for which the Federal Govt must keep current with.  It’s the end of July and the IRS literally just updated its records for The Foundation to its new legally registered name.  Our LLCs name was changed at the same time both were reported at the same time, yet they were also treated entirely different. Not only was the LLCs name changed, it was offered the choice of keeping or establishing a new EIN. So its info was updated 26 days later, where the Foundation had to wait for more than 5 months.  In addition to bank accounts, other things like certifications, membership, | Occupancy leases, biz vehicle, even cell phone or other accounts are all impacted by having a new biz name with old EIN which still references the old name. So if we are seeing these inconsistencies in recognition of a business name, you could expect to encounter similar issues for example with technology purchases, grants you like to pursue or other assets that will fall beyond your reach because its taking longer than the norm to receive your exemption.  We’ve been able to move on some things while seeing others stalled and though it only fair that grant & donation administration services be relaxed to that our Awardees who may experience excessive delays awaiting their Applications determination not be penalized or miss out | The Tax Exempt/Govt Entities Unit (TE/GE) has new leadership and we are hoping for more common sense/streamlined approach to processing F1023/24 applications even further so that exempt businesses don’t continue to be caught by unforeseen that further delay or stall their forward movement. These instances are increasing so consistently we resurrected a consulting service as a charitable working group form dedicated to documenting these types of events and solutions crafted to keep things moving.  Those sections are further into the application and we hope you continue on to complete the application once you read (not skip) thru them and again, thank you for trust us enough to inquire. |

# Overview

* Our Fiscal Sponsorships operate virtually, in person, nationally, and Multi-Lingual on Request as we hire.
* Our Podcast Series is delayed but launches when we secure a new host location. We have two series and their Episodes Spotlight new Startups, others are Hosted by them, and Our Awardees get 1st Dibs. You In? [ Y ] [ N ]
* We HELP with whatever you need, show or train to ensure your understanding is both accurate and complete,
* Program Management is available for a monthly stipend, terms must be requested for inclusion in to specify in Program Registration and Right to Represent,
* Grant/Donation Administration is available, schedule/terms must be reviewed to specify in Program Registration and for inclusion in Right to Represent,
* We help 501cs from early idea stage, thru 5th year operations and sometimes beyond that. Having been there ourselves, we focus heavily on exempts who through no fault of their own find they are stuck in startup mode,
* Programs are category based with sponsorship classified from basic to customized. We have accommodate multiple entities at the same time and will make your effort an Special Project Sponsorship to internal to use that You Run if you unable or not positioned to and require longer than 2 years. Example; free product donations.
* We’re an exempt whose procurement emulates the Govt with registered suppliers that must discount offerings. However theirs is a closed system where only the Govt see them but ours is open & Offerors are visible c/o 2 image directories for increased B2B engagements. One Directory is listings only; the other populates our ***Pollination Partners Network(PPN)***. These are vetted businesses for auto/direct referrals thru 3PM our Procurement system where everyone has visitor exposure as seller and a buyer. So you also have a pool asset sellers that is always consistent, price-friendly reliable and choosing you as a Startup2SmBiz market they want to serve.

# Benefits, Eligibility, Terms, Assets & Perks

Intent

We used to“***work relentlessly***” to create connections, programs and B2B opportunities so 501c startups, & small businesses had equal access to funding, lending, merchant, media, operations resources on par with for profit startups. But the volatility of recent years, then COVID exposed intents that ranged from fake & inconsistent to vicious & predatory.

So we expanded our own assets & elevated other supports and created our own network charities to funnel incubator services propelling success of Exempt Startup & Small Business Peers by sharing what’s we created to replace what we are denied access to, and changed our names so they say it all.

Goody-Goodies

Here’s a quick list, the attached org chart shows the full portfolio of charitable, programs, services & products pending Patent/Trademark applications, all delivering what you need directly to you.

|  |  |
| --- | --- |
| **Recent & Upcoming 2024 Launches** | **In the Works & Coming Down the Pike** |
| * 501c Startup & Small Business Collective (501cSBC)™ (impact solutions working group forum) * National Chamber of Tax-Exempt Small Businesses (NCTSB)™ (unifies & promotes the Exempt Business Concern) * Association of Tax Exempt Startups & Entrepreneurs (ATESE)™ (Founders Assn for the 501c Startup & Small Biz) * Exempt Entities Mentors Council (501c-MC)™ (exempt version of SCORE but longer & far more personalized) * The Helping Hand Fund (HFF)™ (small $1 lending, Stipends for Awardees & Volunteer’s & more) * 800BlowOffSomeSteam.com™ (anonymous venting site for excess) * Academic Partnership Initiative (API)™ & A Leg Up for 501c Startups (501cLegUp)™ * ED-Lab Online II™ (Student Intern Training Portal) * Fair Mrkt Valued Assets (FMVA)™ (real estate donations for 501cs) | * The 501c Federal Credit Union (501cFCU)™ (Chartering in Process) * The Fellowship Academy for Leadership & Business Continuity™ (Fellowships, ProfDev, Prgms w/Mentorships & more) * Podcasting Business Center (PBC) (our Official HQ w/Natl branches/mobile, ops includes Market Xchange, Member Ops & more) * ***PBC Comm & Media Center: (2 Podcast Series: 501cSBC & the 501c Startup-2-SmallBiz Xchange)*** * The Institute for 501c Entrepreneurial Economic Development (I5eeD)™ (Think Tank, search underway for host -sponsor) * The Council for 501c/Tax Exempt Entrepreneurial Policy Development and Inclusion™ (I5eeDs 5-division research center) * The Charitable Smiles Foundation™ (sibling Foundation to EEF-501c for our physical, oral & mental health/well-fitness operations) |
| **Migration of Legacy Websites**  Our **Discount Supply Network** websites -- which began as a few Affiliates that exploded into more than 120 – and our fundraiser, **ThriftStore Finds** are both on hiatus as we relocate to internal LIVE Action sites we host internally as subdomains. Feel free to visit as we work to get them reconfigured and ready for Go-Back-Live. Njoy! | |

A web map alarmed hyperlinks will connect you to its respective sights. These orgs provide everything from peer-based memberships, to a mentors council, business exchange, donated real estate, and media communications.

We’re even chartering our own Federal Credit Union to meet our unique needs as legally registered business concerns that just happened to be exempt entities. We converted internal resources turned growing network of charitable operations so that you have ***NO GO BETWEENS BETWEEN YOU AND WHAT YOU NEED FOR YOUR EXEMPT BUSINESS***.

Who’s Eligible & Whose Not

We are chartered for US activities only. Applicants must be a US Business legally registered as a Non-Stock Entity (of whatever verbiage your State Government uses). Here in Maryland its Non-Stock Corporation and several states can also allow Nonprofit LLCs.

Feel free to visit the Unites State Internal Revenue Service (IRS) website at [www.IRS.gov](http://www.IRS.gov) for clarification on the definition of a United States tax exempt entity TE vs. GE (government entities) and the 25+ classifications which will determine use of IRS Form 1023 or 1024. A sub-charter classification is part of the determination process and will influence what taxes you are exempt from and what tax you must pay. Letters of Determination state all three.

Applicants must be:

* pursuing tax exempt status, **or**
* awaiting the IRS ruling on their F1023/1024 Application for Tax Exempt Status, **or**
* have a letter of determination indicating the IRS has given them a favorable ruling, meaning they already been granted tax exempt status as defined by the Unites State Internal Revenue Service (IRS) qualify, **or**
* be an individual or group desiring a charitable endeavor but are not able or positioned to see it thru or accept contributions directly, **or**
* another type of entity transitioning to exemption or planning the transition to exemption

Sorry but No’s

Orgs not eligible include *For-Profit startups that just need help* – you have access to resources exempt businesses cannot pursue or are barred from and eliminating those asset gaps for them is why we are here. *Government Entities (GE)* which are exempts established by a Government agency to operate a government program or administrate program funds, and *any Non-US business looking for US sponsorship*. For you we can research our Peers and compile a list of Sponsors who serve the International space.

We have a ***Research Request Application (RRA)*** & a fee payable in Certified US Dollars. However as we are not chartered internationally, that is the most we are able to do. We also do not make recommendations.

# FYI: Conditions for Acceptance of Grants/Donation

As is true of anything, there are a number of misconceptions about becoming an exempt business entity and even more about pursuing grants and fundraising.

Since we have your attention this is a good place to ensure you are properly and accurately informed, so you are never caught off guard by incomplete or inaccurate information. It is critical because it is the sole determinant for how you should move forward in any sponsorship, in planning grant/donation outreached, is some of the work intend as an exempt entity – and that is across the board.

The following hot topic focuses on activities with the most adverse impact to a F1023/24 Applicants forward movement.

Exemption Process & Frequent Applicant Trouble Spots

The process to tax exemption really is a straightforward one, but it’s extraordinarily tedious and it’s that devil of details that get folks every time. Fortunately, we had a relative who created them frequently for their Frat and we learned it so young it’s instinctive. So we keep up with process and regulations as they materialize but we also work from the ground up and are who we serve.

That said, know that your hiccups are ours as well, that’s why we are different. We are constantly honing and note areas folks repeatedly trip themselves up on and that we ourselves miss/forget/overlook from time-to-time.

**PLEASE NOTE: We (our Founder) has a 100% perfect submission approval record**. As in **NEVER** had a F1023/24 Application denied, delayed/returned for incompletion by the IRS when submitted as prepared by us or adhered to when the recommended guidance/instructions were followed without change.

No experts here, experts think they don’t need to keep learning. We’re all about continuously learning and adjusting what we know to what is needed. We experience exempt challenges first-hand and craft solutions to get by blockages and exclusions to keep things moving, even when it doesn’t look it. Those solutions, strategies, resources, and trainings are what we are share, provide, and include in our growing portfolio of empowerment and self-sufficiency programs.

So with that, here goes:

* **Exemption comes from the Federal Govt** not the State you register your business with. ***The State registration is a business classification type which is how they are able to allow you to register as an exempt entity BEFORE the Feds give you permission to operate like one*.**
* **Exemption = Drivers Permit, its permission given to do somethin**g
  + in the public good,
  + to act like an extension of the Federal Govt,
  + Exemption is temporary,
  + must be renewed, maintain,
  + can and WILL be suspended, revoked &
  + if suspended or revoked then you must start over to reestablish from scratch
  + does not guarantee receipt of grants
  + does not exempt you from ALL taxes, only taxes directly related to your missions exempt sub-charter classification
  + is still taxable from private industry on a company by company basis unless exemption by policy is applied for then granted
* **It matters not who you hire to do whatever, you are STILL responsible for knowing everything** 
  + **about your org, its finances, compliance obligations and operationally**
  + that your exempt entity does/does not do,
  + is obligated for, and
  + **For grant-givers**, it’s the ***knowing about*** (not necessarily doing it yourself) that can Abe the difference between getting and not getting an audience more or less a grant.

Everything is put in writing and is anticipated to be known by you when you encounter a Govt Officer. It’s meticulous but some of those things are deal breakers

Biggest Trouble Maker

The main trouble we see business get into are predictable like clockwork and 100% avoidable:

* **NOT ESTABLISING A SALE/USE TAX ACCOUNT once you start your business operations,** and
* **FUNDRAISING AS SOON AS YOUR BIZ REGISTRATION IS APPROVED BY YOUR STATE**

**Both are no-no’s that will get you in trouble with your State and denied exempt status from the IRS** –

Both are also the 1st touch points the IRS screens when processing F1023/24 submissions, especially the 1023EZ. These are both self-inflicted setbacks that will cost you time and money to resolve.

# Exemption Here You Come!

Here is the complete series to the Exemption Process –in order from start to finish

**Step 1: Incorporation**

* Register for Business License with incorporating State
* Register Business for Sales/Use Tax with Comptroller for Incorporated State (& then home State if different, i.e. Incorporate in DE, home State is MD – sales/use tax required in DE & MD)

**Step 2: Federal Registration**

* Apply online for EIN
* Download Form 10233 or 1024 for your desired entity and complete as draft.
  + Include all parts required for your particular exemption
  + Have complete org chart, proposed board, conflict of interest (even if in draft)
  + Have complete articles (not state but internal)
  + Have complete examples of mission, work being done, results from services, whose being helped/served

**Step 3: Fundraising**

***To fundraise internally***, there are two paths, both land you in the same place – Registered on your States Charity List.

***To accept donated funds from Federal/State Employees*** (***Combined Federal Campaign***), you must be registered with your State on their Charities List for a specific period of time **BEFORE YOU CAN APPLY TO BE INCLUDED** Combined Federal Campaign list receive Govt donations.

Minimum time frames vary from State to State, DC, PR .

We are producing a Master Resource Guide and Encyclopedia as a complete one-source guide and charts with this type of data are part of what’s included in it.

***Example***. Here in Maryland, you have to be on the State Charity list for 2 years before you are eligible to apply for MDs Combined Campaign.

We’ve been registered but have not applied to MCC electing to wait until our expansion and new biz name processes were complete. Both are as of July 2024, so we will be submitting our application for the MCC’s 2025 list cycle soon as we receive the notice the registration period is open.

MD also has short windows and in some years that window is a different time frame. So early on we applied knowing we didn’t qualify so we would be on their notification list and each year since we’ve received an invitation to apply when it opens up.

One final alert – the CC notice/registration cycle may be shorter than or end before your States Charity Registration Cycle. If so, this mean you may have to wait **3** years instead of two based on how and when those dates fall within your State.

Again, here in MD, our registration cycle end Feb 28th, our automatic extension to renew is August 13th.

However, MCCs last end of registration cycle was the 13th of Feb. So be mindful of what the dates are they may change on an annual basis and you don’t want to caught else you’ll have to wait another year.

To engage in fundraising, your Two (2) paths to choice between are:

|  |  |
| --- | --- |
| **Acting Without Your IRS Exemption** | **Acting After Receiving Your IRS Exemption** |
| If you do not have your Letter of Determination from the IRS, ***you can only accept donations and pursue grants thru a Fiscal Sponsor***.  The Fiscal Sponsor must have a ***Right to Represent Agreement*** under both it and your signature granting it authority to act on your behalf & to pursue/accept funds for your entity  ***HOWEVER, THEY MUST HAVE THEIR OWN BANK ACCOUNT***, and they must be able to articulate under their own Letterhead with State permission to do so when beyond their HQ home (registered) | Once you receive your Letter of Determination ***you must register with your States Charity Authority.*** As do your Sponsors  In some States that process goes to the Governor’s Office, in others it’s the Office of The States Attorney General.  In all cases:   * There is a fixed term of registration requirement, different application process, fee amount, submission process and criteria to satisfy BEFORE you are eligible to ***Apply for Permission to Fundraise*** . * ***As an Exempt or Applicant you are still responsible for registering with their State, because you are responsible for having a Sale/Use Tax account for IRS exemption approval.***   **Example**:  Here in MD I registered first now renewal Annually as a 501c and I do so every year in order to be eligible to Apply to other States, for their WRITTEN Permission to fundraise..  Once Approval is granted, I as a Sponsor must establish a separate bank account to accept funds for my Awardees behalf. Those are then reported on 990s along with our 990 n . |

# Program Categories & Fee Schedules

Primary Sponsorships

**EEF-501c’s Fiscal Sponsorship program has several Primary categories surrounding the exempt formation, business setup & program operations.** All include a nominal, non-refundable application fee to offset processing, legal and other costs including external ones. We keep all fees as modest as is possible to do and we are able to do so because our parent, the ***501c Business Incubator Council***, handles as many compliance & regulatory obligations as is possible, saving is charities money for overhead they don’t have to recover. **This Application is for Tech Asst/ProgramMgmt Categories 1, 2, 3 & 7.**

They are as follows:

* **Category 1: Applicants Pursuing Tax Exempt Status But Not Ready to File: $575**
* **Category 2: Applicants Ready to File for Tax Exempt Status But Require Some Level of Assistance: $425**
* **Category 3: Applicants Needing Operational or Program Management (*filing status not a factor*): $375**
* **Category 4:** Applicants Wanting Only Grant/Donation Processing Services: $275
* **Category 5**: Applicants Needing Tech Products/Equipment Purchase: Volume $350/One-Time $150
* **Category 6**: Application for the FMVA Donated Real Estate (FMVA/DRE) Program: $325
* Category 7 ***BackAgain*** -- Applicants desiring the Status of their former 501c Reinstated with the IRS: $750

***Category 1-3,*** and ***7*** include Grant/Donation Processing, Cat 4 is when ***only*** Grant/ Donation Processing is desired.

**Supporting Sponsorships**

We have several customized sponsorship and have no problem creating additional sponsorships for needs that fall outside the traditional. Thus far those include:

|  |  |  |
| --- | --- | --- |
| **Special Project Fiscal Sponsorships (SPFS)**  If you are a For-Profit, an Individual, or Group with a Charitable Programs, Project, or Product that is a Charitable endeavor, we’ve created the Special Project Fiscal Sponsorship.  The SPFS is a Sponsorship we make an in-house “special” program/project/product development/deployment initiative, only you run it and we provide you the support required to do so. Submit a Letter of Request (LOR). Fee is $1250. | **Dual-Multiple Entity (DME) Fiscal Sponsorship**:  DME is our Dual-Entity Fiscal Sponsorships (Duals): DME is a Combined Application for 2 Entities were its Application & Registration are Combined  DME is 1 Application for 2 entities where the Fee has been reduced but still combines both application & registration. This fee is $1750. | **Multiple-Entity Fiscal Sponsorships**. (DME+)  DME+ is a Combined Application for 5 Entities were the Application & Registration are Combined into 1 package with two sections. The first section is the Application Summary – this summarized the Group.  The second section is the Service & Program Registration, this is where you spell out the needs of EACH entity. Fee been discounted to allow for 4-5 entities $3350, Should there be an additional entity with sponsorship needs, its advised that a Lead entity be selected for up to 5 so we can determine the best inclusion option. For example, if 1 entity is Grant only, problem solved because they must be complete the Cat4: Grant/Donation Processing Application anyway. |

Creating something from nothing is what we do and we’re good at it. So if you don’t see it, ask – if we can we’ll make it happen, else we’ll get you as close as is possible.

* Category 1-3 F1023/1024 prep and/or Ops Assistance includes grant/donation acceptance,
* Category 4: Only for Grant & Donation processing
* Category 5: Tech Purchases & Category 6: registering for Surplus & Property Donation each have their own purpose-specific FS Applications
  + These also include mandatory Fed/State Agencies Fees to secure their respective assets ***IN ADDITION*** to our Sponsorship Program App/Reg fee.
* Category 7: 501c Reinstatements and Special Circumstances Fiscal Sponsorship address unique needs including: Confidential Sponsorships, custom designed sponsorship programs -- just ask!

**Fee Policy**

Application Fees are not refundable but should circumstances change our Registration fee is refundable before the 4th business day, less $75 to cover any subsequent transactional or instrument processing fees we’ve incurred.

**Flexibilities**

***Need an Invoice first, sure thing***. Submit an LOI and we’ll provide an Invoice with you FS Application, or email it to your attention.

***No funds to cover your Application/Registration fee?*** If you have a grant pending, no problem, you can use your grant to cover the App/Reg fees once it’s received.

No enough funds or not possible to pay upfront, again no problem -- lets chat about it. We have other options including Deferments you may be able to utilize, including programs thru our Stripe Partnership.

Program Terms

|  |  |
| --- | --- |
| **Fiscal Sponsorships run 6 months - 2-years in 6-month increments, no smaller.**  After 2yrs Awardees wanting to continue move to ***TASC***, for support for everything but Grants, which legally requires a Fiscal Sponsorship?  **Cat 4 Grants/Donation Only is the only Primary Sponsorship treated as a Special Circumstance Extendable Sponsorship**, this and similar arrangements may or may not be advertised and is based on service capacity.  Our intent is to help every applicant that applies; we will only do so IF we can do as is requested.  Be advised, acceptance is not automatic, consultation has no influence. "Us" having what’s needed and the ability to deploy it is what results in an approval, hence LOI's so needs can be pre-assessed & resources determined. | **In fairness to other applicants, renewals after 2 years are not accepted for sponsorships other than Grant and Donation Processing.**  **Cat 4: Grant and Donation Processing will be indefinite,** for Cats 1-3 your Sponsorship will transition to TASC after the 2-year cycle ends BUT shall remain open-ended should grant/donation needs arise so that you can take advantage of those opportunity in spite of any IRS delays.  We’ll have an Amendment for both our signatures allowing you to resume your Sponsorship for the duration of your grant/donations administration, and we’ll do that as many instances as is required until our assistance is no longer needed.  ***BackAgain*** Reinstatement Sponsorships are open-ended. Program length can have no specific term given the IRS processing varies greatly for Reinstatements. |

Our ***Technical Assistance Service Center (TASC)*** was established specifically for business support without the FS commitment. Its open-ended so duration are as long or short as needed, and Awardees are able to continue getting what they need for as long as is desired.

As mentioned earlier, if need be a Grant/Donation Sponsorship can be Appended so those opportunities can be accepted.

**FISCAL SPONSORSHIP APPLICATION Q&A**

# Q&A: Applicant/Organizational Information

***For Clarity, Type Written Responses Only***

1. **Your Name & Title:**

|  |
| --- |
|  |

1. **Your Preferred Contact Info (Mailing Address, Phone, Email (*only one please*):**

|  |
| --- |
|  |

1. **The Organization Proposed Name & Tax ID#:** *(If you have no tax ID/EIN , call 800 829 4933 or apply online at* [*www.IRS.gov/Apply4EIN*](https://www.irs.gov/businesses/small-businesses-self-employed/get-an-employer-identification-number)*, its free)*

|  |
| --- |
|  |

1. **Name and Title of Other Key Players (if any).** (Volunteers, officers, interim/acting officers, potential board member, staff; if NONE, enter TBD (*to be determined*)):

|  |
| --- |
|  |

1. **Location of Proposed Operations (city, state; indicate if operations will be national):**

|  |
| --- |
|  |

1. **How did you hear about EEF-501c™?**

|  |
| --- |
|  |

1. **If approved by the IRS, what type of tax exempt entity will your organization be?**

[  ] Association [  ] Charity [  ] Church/Religious Org [  ] Education Institution

[  ] Non Profit [  ] Private Foundation [  ] Public Foundation [  ] Political Entity

[  ] Chamber [  ] Trust [  ] PROGRAM ONLY [  ] OTHER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Have you completed your IRS Form 1023/1024 application for tax exempt status?**

[  ] Y [  ] N [  ] In Progress

1. **If not, is that something we need to help you with?** [  ] Y [  ] N

# Description of Your Work

**Please keep responses within the space allotted**. Concise, direct answers are fine at this stage, no details are needed. Give just enough information to indicate the need. If approved, you’ll be able to elaborate on the **Fiscal Sponsorship Registration Form** which is how we will develop the particulars of your Sponsorship needs in terms of supports and assets.

All we require now is a well-crafted outline or summary so we have a general idea and to assess if your sponsorship can be done in-house or with external supports.

**For example, if you are self-administering your grants, state that here**. On your Registration form, you will have a schedule of reports section to provide us with a list of reporting’s you are preparing that we must co-sign(off) on. If you prefer we administer, you state that here in the App.

**Your Program Registration has a Terms section for reporting obligations**, listing you disbursement recipients, a disbursement schedule, etc. and the Admin Fee, we’ll include a copy of our Auto-Calculator for you to play with so you know exactly what the fees look like and how little comes to us.

**Lastly, Grant/Donation Administration fees may be a flat fee or a scheduled stipend**. It’s based on what administration is needed and at what the frequency of activity is. Please remember ***you cannot legally fundraise or directly accept donations until you receive your IRS 501c designation***, this includes online donation. If you want a donation link on your website, it must be linked to the bank account we are legally required to establish for you, that’s its purpose and must say so so donors are aware you are being fiscally sponsored.

Summary

Provide an outline on the basic mission of your organization and how you plan to achieve its goals. Include who, what, why, where, when and how. This is your elevator pitch, we should be able to absorb and comprehend your purpose and activities quickly. You will be able to elaborate more in your Registration for that’s doc is for the nitty gritty details.

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What You Need

Our goal is to assist and support the pre-startup phase thru young in operations of US based 501c, including those stuck in startup mode. Tell us…

1. **Why your organization necessary, what made you decide to start it, and why will it be successful?**

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1. **What kind of exposure has your new entity had, or does it need. Many are NOT on social media so how can you reach them?**

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1. **What have you already done to accomplish your goal of achieving tax exempt status? How far along are you in that process, and what other “*non-financial*” assistance do you need from EEF-501c™ ?**

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1. **From an operations perspective, how will the organization function?** (Explain what you plan to do, whether or not you’re already begun, when is your start anticipated, who will be helping, who you’ll be serving, and how will you reach them?

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1. **What type of operational infrastructure will your organization need in order to run?**

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1. **Do you require assistance in developing the operational infrastructure for your organizations planned department? If so, do you need assistance with or connection to any of the following? Check all that apply:**
   1. Organizational Chart, Governance and Overall Business Unit Development [ ]
   2. HR Department and Infrastructure Development [ ]
   3. Finance Department and Infrastructure Development [ ]
   4. Financial Management/Investment Management [ ]
   5. Project Accounting [ ]
   6. Tax Management & Administration [ ]
   7. Technology Department and Infrastructure Development [ ]
   8. Programmatic Development, Professional Development Training Department/Program/Materials [ ]
   9. Industry/Service Specific Policy Development, Compliance/Audit Resource Development [ ]
   10. Other type of assistance not mentioned [ ]
   11. Compliance, Business or Operational Analytics, Actuarial services. [ ]

If none of the above services are required, tell us what you need, and state if a mentor or special partnership would be helpful.

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1. **What else do we need to know about your organization? What other people, entities, organizations are already aware of you and the work you plan to undertake?**

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# Incoming/Pending Grants & Donations

**Are there any current, future, or ongoing activities we should be aware of with regard to anticipated grants, monetary donations, fundraising activities or investment funding?** IF so, please complete the chart below.

Include use of your own personal funds, contributions from friends/loved ones. Donors, Grantors and Investors who might consider Ad or Co-Branding Sponsor/Partnerships will always want to see how much of your own funds and free time you’ve Invested as a sign of commitment to you entity.

EEF-501c does not pursue grants directly for its awardees, we assist you in your pursuit which avoids conflict of interest.

However, you should be aware of some disclose requirements. We recommend documenting in a spreadsheet as Source of Funds Report to keep handy for when requested and to use for your charitable registration funding summary. We delineating as follows:

* start-yr. 5, 93% from personal funds, 7% self-revenue, and
* maintained since COVID 50/50 self-revenue/EIDL funds, 6% funds and 1% personal funds as our example.

***This will be info you may need to report to comply as part of your states charitable registration process***. If more space is needed, leave the chart blank, copy it and attach .

|  |  |  |  |
| --- | --- | --- | --- |
| **AMOUNT** | **What Are These Funds Targeted For?** | **Source of Contribution Funds**  **(Circle all that apply)** | **Date Due or Expected** |
| $ 0. 00 |  | [ ] You [ ] Someone Else  [ ] A Group or Organization (insert name):  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| $ 0. 00 |  | [ ] You [ ] Someone Else  [ ] A Group or Organization (insert name):  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| $ 0. 00 |  | [ ] You [ ] Someone Else  [ ] A Group or Organization (insert name):  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| $ 0. 00 |  | [ ] You [ ] Someone Else  [ ] A Group or Organization (insert name):  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

1. **Will you require tax administration or finance instruction from an EEF-501c resource? If so, what type of what specific areas do you need help with?**

[ ] securing grants/donations [ ] securing investment financing [ ] other revenue streams

1. **Will you require help that IS NOT Donor- reliant? If so, check all that apply.**

[ ] Membership Dues [ ] Technical Assistance\* [ ] Special Services\* [ ] Events

[ ] Program Management\* [ ] Other\*

\*Briefly summarize below, you can articulate more and in detail on your Programs Registration form)

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# Fiscal Sponsorship: Program & Processes

Applying to our Fiscal Sponsorship Program is only a few steps:

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| --- | --- | --- |
| 1. **LOI**; gets things going, conveys the info necessary to determine if we can help you, preliminary review make sure eligibility has been met and assuming yes, we send the appropriate Application, 2. **Application Submission**: apps clear Auditing to affirm all compliance materials we’re obligated to record were provided and are forwarded to PMO based on Application Category, make sure to include your checklist and the mandatory items on it, | 1. **Audit Review & Validation**: clarification interviews if needed, otherwise confirming legal docs provided, and research to determine info resources are available, if Award can be administered internally.   If not, determination of who externally is available, then notification, completion of the Right-to-Represent (R2R), Registration Form to finalize you Welcome Package | 1. **Award & Onboarding**: formal registration into the program is done. Program Registration includes payment of a nominal one-time setup fee of $550 for Cat 1-3, $250 for ***Grant/Donation Processing***.   *This offsets the cost of accounts we must establish as fiscal sponsors for Awardees resources that legally cannot co-mingle with ours, including bank accounts where you have on or not*.  Stipend or Flat Fee for ***Grant/Donation Administration based on activities)***. |

# Application & Submission

For the duration of the year, we are accepting **electronic payments only** – given everyone’s travel and my dual Probate Court obligations, we don’t want to create untimely delays for anyone. If you’ve not done so previously, you may pay your ***Cat 1, 2, or 3 Application Fee*** using this secure [**Stripe Link**](https://buy.stripe.com/7sI02v4m5c7jcLKcNd)

To Submit your FS Application , send via EMAIL ONLY

* checklist completed with any items listed when check off for inclusion,
* completed FS Application Package,
* copy of Application Fee receipt as appropriate for your category
* confirm all signature pages are scanned & included

**Email:** [FiscalSponsorships@501cEconomicEmpowermentFndn.org](mailto:FiscalSponsorships@501cEconomicEmpowermentFndn.org)

**…on Subject line:**

**CAT # 1-2 or 3** Fiscal Sponsorship Application Package

…in the body of the email:

**FS Program Review Panel**

**ATTN**: Fiscal Sponsorship Application Package

for [[[ ***YOUR Name & YOUR CHARITIES NAME*** ]]]

**PLEASE SAVE & PRINTOUT ENTIRE APPLICATION**

**Initial, Sign & Date as indicated on the following Pages**

**Then SCAN back to PDF for Submission. Thank You.**

By submitting this application, you are confirming that you have approved all of its contents and that they are truthful.

You are also confirming that (unless you clearly specify otherwise directly in this application form), you are allowing EEF-501c™ to share the contents of your application (but not your contact info) on our website, social media, with outside media and with the general public for the purposes of assisting you and your organization to achieve the goals outlined for your organization within this application.

You are also allowing EEF-501c™ this privilege at a later date as a demonstration of our work and commitment to helping our peer 501c entrepreneurs beyond their pursuit of tax exempt status, details to be articulated upon an award in our Fiscal Sponsorship Program Registration Package.

You further state that if you are request to remain anonymous, that will be articulated in the ***Right to Represent Agreement*** that is legally required in order for EEF-501c™ to assume the legal, fiduciary responsibility of serving as Fiscal Sponsor to **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** (name of the organization).

That being said, due to EEF-501c™ is well accustomed in honoring full anonymity of our Awardees. Therefore, it is with your permission that EEF-501c™ will hold in confidence your entities identification and only remark a non-revealing description of the organization as part of its disclosure process when required to articulate information on whom has been served in lieu of a reference, .

**[ ] Please Initial to Acknowledge Submission Terms**

FS Application Check List

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| --- | --- | --- |
| Included | Required Document | Comments/Additional Info |
|  | 1. IRS Letter 147c, Federal EIN/Tax ID |  |
|  | 1. State Articles of Incorporation (AoI) forming your business as a Non-Stock Corporation or Articles of Amendment (AoA) changing it to a Non-Stock Corp |  |
|  | 1. Org Chart: w/Names Principal Officer, Board Chair |  |
|  | 1. FS Application for desired Sponsorship Category |  |
|  | 1. Application Fee Receipt |  |
|  | 1. IRS Letter of Determination (if available) **or** |  |
|  | 1. IRS Acknowledgement of Receipt for your Form 1023/1024 Application    1. when full F1024 is mailed in – grace period still in effect;    2. when done online: Printed Acknowledgement for when 1023 EZ Streamlined is used |  |
|  | 1. Your Check List ☺ |  |

# Application Disclaimer & Terms

Economic Empowerment Foundation for Exempt Startups & Small Businesses™ Does Not Issue or Make Grant Awards of Any Kind. We have Special Projects that award Participants Stipend to offset their costs, but they are both specific to specific programs and time sensitive as funds are available to issue. We have a Helping Hand Fund (HHF) which has not been replenished. HHF is our small dollar lending program that also covers program Stipends including Interns/Fellows that provide direct aid/support to Program participants and Awardees.

This application is NOT for the receipt of grants or direct/indirect funding of any kind, or the management of non-financial assets. Therefore, if your need requires funding, your team should pursue the appropriate channels to achieve that goal. For Real Property, request our Cat 6 Fiscal Sponsorship Application.

**[ ] Please Initial to Acknowledge Funding Disclaimer**

Grant & Donation Processing EEF-501c™ will only accept grants and donations on behalf of its Fiscal Sponsorship Awardees for Categories 1-4. Loan and other financing option are not available from EEF-501c, will be thru the Federal Credit Union its charter and small $1 lending once its Helping Hand Fund is fully replenished. .

**[ ] Please Initial to Acknowledge Funding Disclaimer**

**PLEASE NOTE THE FOLLOWING:**

While we aim to help everyone, Applications, either verbal, written, or by invitation by EEF-501c™ for fiscal sponsorship should not be construed as an automatic entry into a Foundation’s Program or access to a protected asset. Discussion do not equal approval, they only provide information or clarify compliance requirements.

Given the Foundation and its Incubator parent are both hand-on and operate in real-time, Application are ALWAYS used to:

* qualify or pre-qualify the Pursuing Party,
* to convey the criteria with which EEF-501c™ relies for making its award,
* to confirm the Applicants current, future or pending tax exempt status
* to confirm an Individual, Group, or For-Profit Applicants selection is aligned with the appropriate Category, and
* to affirm EEF-501c™ current capacity to accommodate incoming request be it internally or supported by PPN(s)

EEF-501c’s Advisory Council (EEF-501c/AC) meets periodically, and commences new program participation on a cyclical basis as Awardees complete their program. EEF-501c™ ***ALWAYS*** reserves the right to modify or close an application cycle, increase fees when costs increase, amend program criteria, and rescind/terminate Awards should fraud or other adverse activity materialize.

Application availability will be announced through print & web media, postings on the EEF-501c™ website, and accepted at least one quarter of each calendar year. The ***Advisory Council (AC***) will process and review applications throughout the application cycle and “after” the applications period had ended as needed, and will notify all applicants of their disposition “once the entire review process has concluded.”

Because our fiscal sponsor services are unique and customized to each awardee, the number of Fiscal Sponsorships awarded depends heavily on the requested services, the availability and replenishment of funds, staff, partners, and other resources. We reserve the right to close or pause LOIs received should the level of request outpace support/resources.

**[ ] Please Initial to Acknowledge Applicant Status Disclaimer**

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**SUBMISSION SIGNATURE**:

(Hand written only, electronic signatures not accepted for applications)

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**Authorized HAND-WRITTEN Signatures Only /Date**

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**Title of Signatory (Print or Type)**

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**Name of Your [Proposed) Organization or Program**

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**Signers Direct Contact Info: Office Phone/Cell + Email**