

APPLYING FOR A NEW PTA

Louisiana PTA (LAPTA) assists with organizing new PTA units who are an independent nonprofit, established in accordance with state and federal laws, and are affiliated with LAPTA and National PTA. The process is unique for each unit, but these are the general steps to take.

Step 1: Contact the Louisiana PTA at office@LouisianaPTA.org to start the process of chartering a Local Unit. The Office manager will arrange for a member of the LAPTA Board of Directors to meet with your group and walk you through the steps in applying for affiliation. Complete **Application for New PTA Unit** on page 3.

Step 2: Form a Planning Committee. Identify parents, school administration, teachers, and community members interested in forming a PTA. Set a time and place for an initial planning meeting and invite the interested parties. Virtual meetings and elections are allowed by LAPTA. At the Planning Committee meeting:

1. Select a Chair and a Secretary of Planning Committee to undertake responsibilities until officers are elected.
2. Organize the Bylaws Committee. Bylaws of the PTA define the primary characteristics of the organization. LAPTA requires the use of the customizable Bylaws template at LouisianaPTA.org/bylaws.
3. Organize the Nominating Committee who seeks qualified individuals to be the nominee for each office as outlined in the proposed Bylaws. Survey your school community to find individuals willing to be nominated for office. All candidates nominated must intend to join the Local Unit PTA and their consent must be obtained before their name is submitted for consideration.
4. Set a date for the organizational meeting to form and charter the new PTA unit.

Step 3: Publicize the Organizational Meeting. Distribute notices of the organizational meeting to all parents, teachers, school staff, and community members. Include the proposed Membership dues in the note and that a minimum of 30 people are required to join and pay dues *during* the meeting.

Step 4:

1. **Call the meeting to order.** Distribute the agenda. The Chair of the Planning Committee explains the purpose of the meeting and introduces speakers who explain the policies and purposes of the PTA. These speakers should include a representative of LAPTA. A meeting to charter a new PTA is a special event. Those present at the organizational meeting will vote in favor of or against the formation of the PTA at the school.
2. **Move to organize.** The Chair calls for a motion to organize a local PTA. The PTA is officially established when the motion is made, receives a second, and is carried by a majority vote by voice.
3. **Distribute and present Bylaws.** Share the Bylaws on paper copies or use a projector. A member of the Bylaws Committee reads the proposed Bylaws and calls attention to the customized articles and sections required for all local PTA units. Each article is read separately so that amendments, if any, can be considered and acted on. As each amendment is offered, it is stated by the committee member, debated, and voted on immediately. A motion is made to adopt each article. A verbal majority vote is required for adoption. A final motion is made to adopt the complete Bylaws as amended.
4. **Hold a short intermission and enroll members.** A minimum of thirty charter members is required to form a Local PTA Unit. A person becomes a charter member upon payment of dues. The amount is decided during the adoption of the Bylaws. Payment may be cash or paid at a temporary CheddarUp.com account that LAPTA will set up for you. An accurate list of members with their contact information must be kept. Use the spreadsheet located at Louisianapta.org/membership. The money collected shall be held in a school safe until the bank account is opened in Step 11. *See the sample Membership Form at the end of this packet.*
5. **Call for Nominating Committee Report and nominations from the floor.** The Chair reconvenes the meeting for nominations and elections. All candidates nominated must be members of the PTA and their consent must be obtained before their names are submitted for nominations. The election shall be by ballot, unless there is only one nominee, in which case the election may be by voice. Officers should be voted on one by one. Only members may vote. A minimum of three officers is required.
6. **Install newly elected officers.** LAPTA representative shall perform the installation, if available.

7. **The newly elected President takes the chair** and calls for further business such as a date of first regular meeting, etc. Adjourn meeting.

Step 5: Email the completed New PTA Unit Organizational Meeting Results Form on page 4 to LAPTA at office@LouisianaPTA.org immediately after the meeting concludes. Attach the required documents. Complete the *Bylaws and Amendments Approval Form* at the end of this packet. **Submit the Bylaws** approved by the membership to LAPTA for final approval at Bylaws@LouisianaPTA.org.

Step 6: Executive Committee meets to set goals, develop a budget for unit approval, select committee chairs, plan for membership drives, and establish communication tools to be used with the membership and within the Board of Directors. The Executive Committee members are identified in the Bylaws. See *Sample Budget* at the end of this packet. See *LAPTA Toolkit* for details on sample committees, membership, finances, and more.

Step 7. Participate in officer and committee training with LAPTA or PTA.org. All Board members shall create an account with PTA.org. Under *Run Your PTA* menu, select *E-Learning* for further training.

Step 8. Conduct a General Membership meeting. The General Membership shall approve the proposed budget. Select authorized signers for the bank account. Include those names and approval of the budget in the minutes. The bank requires this document to allow signers on the account. See *LAPTA Toolkit: President* for suggested scripts for budget approval and more.

Step 9. Apply for EIN number online with the IRS. The PTA fiscal year runs July 1 – June 30. Your unit will be placed under Louisiana PTA group tax exemption. See *directions at the end of this packet*. Email your EIN to LAPTA at office@LouisianaPTA.org.

Step 10. Apply for Articles of Incorporation at the Louisiana Secretary of State at geauxbiz.com. Cost is \$75. See *directions at the end of this packet*. Email your Articles of Incorporation to office@LouisianaPTA.org.

Step 11. Establish the checking account. When the Local Unit has its EIN and has incorporated through the Louisiana Secretary of State, a bank account can be opened. Ask the bank for their specific requirements. There shall be at least three authorized signers who must also be elected officers. Debit cards may be ordered by the authorized signers with the PTA name on the card. Online banking and E-Commerce are allowed. Deposit the member dues when opening the bank account. See *LAPTA Toolkit: Treasurer* for banking details.

Step 12. Obtain insurance for general liability and bonding. LAPTA and National PTA have a relationship with AIM Insurance which can be contacted at (800) 876-4044 or AIM-companies.com. Annual cost starts at \$220.

Step 13. Have all Board members register with LAPTA at LouisianaPTA.org/submit-officer-data-1. Create email accounts for all Board members specific to the PTA such as president.ABCPTA@gmail.com.

Step 14. Email the New PTA Unit: General Membership Meeting Results form to office@LouisianaPTA.org to receive your new PTA Charter paperwork and LUR# (Local Unit Registration number)!

Step 15. Plan programs and projects. PTA.org is an excellent source of information and programs for the community. Coordinate plans with the principal. Remember to advocate for every child in your school!

Step 16. Celebrate! And Welcome to National PTA and Louisiana PTA!

APPLICATION FOR NEW PTA UNIT



Louisiana PTA (LAPTA) and National PTA welcome you! To start a new PTA, please apply online at <https://form.jotform.com/222127875041048> or scan the QR Code. Skip pages 2 and 3 of the form. A LAPTA officer will reach out to you to get the process started! The information you will need is:

1. Name of Contact, phone, and email
2. Name of School Associated with PTA and school address
3. Name of School Contact, phone, and email
4. What grades are at the school?
5. Has there been a PTA/PTSA previously at the school? If yes, what was the name of the PTA and what information do you know about it?

ORGANIZATIONAL MEETING RESULTS

Submit online at <https://form.jotform.com/222127875041048> or scan the QR Code. Skip to page 2. The _____ PTA hereby makes an application for membership to the Louisiana Congress of Parent Teacher Association (Louisiana PTA or LAPTA.)

1. Uploaded Documents:
 - Membership Report Spreadsheet with at least 30 paid members
 - Nominating Committee Report with election results (if different)
 - Board of Directors Roster
 - Organizational Meeting minutes signed by presiding Chair, Secretary, or Principal
 - Bylaws Approval Form
 - Bylaws were emailed to Bylaws@LouisianaPTA.org.

GENERAL MEMBERSHIP MEETING RESULTS

Submit information online at <https://form.jotform.com/222127875041048> or scan the QR Code. Skip to page 3. Once the information is received, please give LAPTA ample time to process your charter. Responses will be emailed to the President's email listed below. The information needed is:

1. PTA's Legal Name, LUR#
2. President's Name, phone, and email
3. Uploaded Documents:
 - Budget Approval Form and the Budget
 - General Membership meeting minutes signed by presiding Chair, Secretary, or principal
 - EIN Confirmation Letter
 - Articles of Incorporation from Louisiana Secretary of State
 - Insurance Declaration page, if applicable
 - Updated Board of Directors Roster, if applicable
 - CheddarUp.com email confirmation of submitted membership dues for at least 30 members
 - A checking account was opened.

Congratulations! You're officially a PTA!

SAMPLE ORGANIZATIONAL MEETING AGENDA

(PTA Name)
Organizational Meeting Agenda
(Location)
(Date, Time)

Opening

- Call to Order
- Read PTA Mission Statement: The Mission of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.
- Introductions of Special Guests

Move to Organize: The Chair calls for a motion to organize a local PTA. The PTA is officially established when the motion is made, receives a second, and is carried by a majority vote by voice.

Bylaws: The Bylaws Committee shall have the proposed Bylaws prepared before the meeting.

- Reading of Bylaws
- Adoption of Bylaws

Intermission

- Refreshments
- Collection of PTA membership dues. See sample Membership Form at the end of this packet.

Reconvene Call to Order

Officers

- Nominating Committee Report
- Call for Nominations from the floor
- Nominating Committee Report
- Election of Officers
- Installation of Officers

Business

- Announcement of first General Membership meeting date and time
- Appointment of Authorized Bank Signers
- Appointment of Budget Committee
- Other

Adjourn

ORGANIZATIONAL MEETING SCRIPT

This optional script is for the Organization Meeting in Step 4 and follows the meeting agenda. The Secretary shall take the minutes for the meeting. Use the *Motion Form* and *Bylaws and Amendments Approval Form* at the end of this section.

Opening: Chair of Planning Committee rises and speaks. “Thank you everyone for attending the Organizational Meeting for the ABC PTA. The purpose of this meeting is to approve the Bylaws, elect the Executive Officers, and get at least thirty paid memberships. I’d like to introduce the Louisiana PTA officer(s) who are here to assist us.... The reason why we are making a new PTA is to make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.”

Move to organize: “Our first order of business is for a motion to organize a new PTA unit. Is there anyone who would make that motion to create a new PTA? (pause) Please state your name. And do I have a second from anyone else? (pause) Is there any discussion for or against this motion? (pause) We are now ready to vote. [Name] has moved for a new PTA unit to be established. All those in favor, say ‘aye.’ (pause) Any opposed, say ‘no.’ (pause) The ayes have it, and the motion passed. Great! Now we will approve the proposed Bylaws.”

Distribute and present Bylaws. “The Bylaws are [posted, displayed, printed, etc.] for you to follow along. The chair of the Bylaws Committee, [name], will read the proposed Bylaws, bringing attention to the customized parts. After each article, we will vote to accept or amend that article.” Bylaws Chair stands and reads each article of the Bylaws. After each article, ask for any amendments, if any, to be considered, discussed, and voted on immediately. A verbal vote is required. Continue through all articles of the Bylaws. Chair of Planning Committee resumes: “Now that we have gone through the Bylaws and voted on all customized articles and made amendments, I need someone to make a motion to accept the proposed Bylaws. (pause) Please state your name. And do I have a second from anyone else? (pause) Is there any discussion for or against this motion? (pause) We are ready to vote. [Name] has moved to accept the proposed Bylaws. All those in favor, say ‘aye.’ (pause) Any opposed, say ‘no.’ (pause) The ayes have it, and the motion passed. We have Bylaws!”

Intermission for memberships: “We will now have a short intermission in which we will solicit new memberships. We need a minimum of 30 paid dues. As the Bylaws state, our dues are [state amounts] which can be paid with cash or paid online at [_____].CheddarUp.com. We have membership forms at [location] for you to complete. We will reconvene in 10 – 15 minutes.” *See the sample Membership Form at the end of this packet.*

Reconvene for elections: Chair of the Planning Committee: “We will now reconvene our meeting. We currently have [number] paid members. Thank you for supporting our PTA! (If you have less than thirty members, work to get more members later. Announce at the meeting that you still need more members as new memberships are open throughout the year.) Our next order of business is the Nomination of Officers and elections. The chair of the Nominating Committee will now read their report.”

Chair of Nominating Committee rises and reads, “The Nominating Committee recommends the following slate of officers: for President, [name], for (continue through all positions).” The chair hands the report to the Chair of the Planning Committee.

Chair of the Planning Committee: “For President, [name] has been nominated. Are there further nominations for President from the floor? (pause) Hearing none, nominations are closed. For Vice-President, [name] has been nominated. Are there further nominations for Vice-President from the floor? (pause) Hearing none, nominations are closed. For Treasurer, [name] has been nominated by the Nominating Committee. Are there further nominations for Treasurer from the floor? (pause) Hearing none, nominations are closed. For Secretary, [name] has been nominated by the Nominating Committee. Are there further nominations for Secretary from the floor?”

(*pause*) Hearing none, nominations are closed. The Bylaws state a voice vote is acceptable when there is but one nominee for an office. All those in favor of the slate of officers as presented, say aye. (*pause*) All those opposed, say nay. (*pause*) The ayes have it and the slate as presented is elected. Congratulations.”

If there is a contested position with more than one nomination, “As Chair, I appoint [four people] as tellers for the Teller Committee. Will [specific Teller’s name] serve as chair?” (*pause*) Only those who are paid members may vote. Would all members please stand? A teller will hand you a ballot as you count off. Please take your seat immediately after saying your number and receiving your ballot. (*pause*) There are [number] voting members present. The candidates for [position] are [name 1] and [name 2]. Using the ballot provided, write your choice for election, and then individually fold your ballot once. (*pause*) Have all voted who wish to vote? Will the tellers please collect the ballots?” *Tellers count the ballots.*

Teller Committee Chair stands and says, “The Teller Committee reports there were [number] eligible votes, [number] votes cast, and [number] illegal votes cast. The number of votes needed for election is [number] which is the majority. [Name 1] received [number] votes. [Name 2] received [number] votes.”

Presiding chair says, “[Name of winner], having received a majority of the votes cast, is elected [position]. Congratulations.” *Continue to the next officer position.*

Installation (optional): The LAPTA officer installs the newly elected officers.

Chair of the Planning Meeting: “The newly elected President, [name], shall now take the chair and preside.”

The President stands, takes the chair, and says, “Thank you for appointing me. I’m honored to serve on the ABC PTA and will do all I can to make every child’s potential a reality by engaging and empowering families and communities to advocate for all children. It’s important! For the bank account, I need to appoint three authorized bank signers who shall be [name], [name], and [name]. We also need to create a Budget Committee. Would anyone like to volunteer for the Budget Committee? (*pause*) The Budget Committee shall be [name], [name], and [name]. Will [one of the three names] serve as the committee chair? (*pause for confirmation*) Thank you. The date for the next General Membership meeting is [date]. Thank you so much for your support! See you at our next meeting on [date]! Please contact me at [email] with your questions and suggestions for the PTA. The meeting is adjourned.” See the *Sample Membership Form* at the end of this packet.

The President completes the *Bylaws and Amendments Approval Form* and the *Reactivation Meeting Results Form*.



NOMINATING COMMITTEE REPORT

The Nominating Committee of the _____ PTA/PTSA submits the following slate of officers for the year _____:

Reference the Bylaws for your elected officer positions. In the event the committee cannot secure a nominee for a position, it remains "open". All officers must be paid members of this PTA.

For President: _____

For Co-President: _____

For Vice-President: _____

For Second Vice-President: _____

For Treasurer: _____

For Secretary: _____

For [Other]: _____

For [Other]: _____

Members of the Nominating Committee:

| | | |
|------|-----------|------|
| Name | Signature | Date |
| Name | Signature | Date |
| Name | Signature | Date |
| Name | Signature | Date |

Nominating Committee members sign the report if they agree with the nominations. Members not in agreement with the recommended slate of officers may not make nominations from the floor.

Retain this official report as part of the Secretary's minutes.



BYLAWS AND AMENDMENTS APPROVAL FORM

Local PTA units are required to establish and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template is required. Visit LouisianaPTA.org/bylaws for details. Email the completed Bylaws Approval Form and LAPTA Bylaws template or the amendments in PDF format to Bylaws@LouisianaPTA.org. Please allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will emailed the approved Bylaws or amendments to the President’s email.

| | | |
|-------------------|-------------------|-----------------|
| _____ | _____ | _____ |
| Local Unit Name | Local Unit Parish | Local Unit LUR# |
| _____ | _____ | |
| President’s Email | President’s Phone | |

The Bylaws or Amendments were approved at the General Membership meeting held on _____ .
DATE

Choose one.

The Local Unit PTA is: Existing PTA Reactivated PTA New PTA

Choose all that apply.

- The Bylaws approved by the General Membership are attached.
- List approved amendments below including the article heading, section number, and line number(s).

If more space is needed for amendments, check here for the attached addendum.

| | |
|-----------------------|-----------------------|
| _____ | _____ |
| President’s Signature | Secretary’s Signature |
| _____ | _____ |
| President’s Name | Secretary’s Name |

Email the completed Bylaws Approval Form and Bylaws template to Bylaws@LouisianaPTA.org in PDF format. Allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will email the final, approved document to the President’s email.

Contact Bylaws@LouisianaPTA.org with any questions.

MOTION FORM



I move that: _____

Printed name who made the motion

Signature

FOR SECRETARY'S USE

Meeting

Date

Motion Number

Motion was: Seconded Adopted Amended Failed Withdrawn

I move that: _____

Printed name who made the motion

Signature

FOR SECRETARY'S USE

Meeting

Date

Motion Number

Motion was: Seconded Adopted Amended Failed Withdrawn



PTA MEMBERSHIP FORM

We invite you to join our new PTA because we can do more together than apart. There is no right or wrong way to be involved. Anything you can give, whether it's time or money, will support our children's potential.

Complete the form below and submit payment of cash or check (cash preferred initially). This makes you a member of our local PTA, National PTA (PTA.org), and Louisiana PTA (LouisianaPTA.org) for the year!

Choose the Membership Type and Quantity: *Prefill the price for each type of membership. Modify as needed.*

- \$___ Business: # _____
- \$___ One Adult: # _____
- \$___ Student: # _____
- \$___ Staff: # _____
- \$___ Two Adults: # _____
- \$___ Grandparent: # _____

Total Dues Attached: \$ _____
Cash or online at _____CheddarUp.com

Circle Membership Type: Parent Grandparent Staff Student Corporate Other: _____
 First & Last Name: _____ Relation to Student: _____
 Email: _____ Phone: _____

Circle Membership Type: Parent Grandparent Staff Student Corporate Other: _____
 First & Last Name: _____ Relation to Student: _____
 Email: _____ Phone: _____

Circle Membership Type: Parent Grandparent Staff Student Corporate Other: _____
 First & Last Name: _____ Relation to Student: _____
 Email: _____ Phone: _____

Circle Membership Type: Parent Grandparent Staff Student Corporate Other: _____
 First & Last Name: _____ Relation to Student: _____
 Email: _____ Phone: _____

Circle Membership Type: Parent Grandparent Staff Student Corporate Other: _____
 First & Last Name: _____ Relation to Student: _____
 Email: _____ Phone: _____

Circle Membership Type: Parent Grandparent Staff Student Corporate Other: _____
 First & Last Name: _____ Relation to Student: _____
 Email: _____ Phone: _____

For Corporate Memberships:
 Business Name: _____ Name: _____
 Email: _____ Phone: _____
 Address: _____

Thank you for supporting our brand-new PTA!
 #PTAForYourChild
There Is No Wrong Way To PTA. How Do You PTA?



TELLER COMMITTEE REPORT

This is used only if there is a contested election of officers.

Name of PTA/PTSA: _____

For the Office of _____

_____ Number of members eligible to vote

_____ Number of votes cast

_____ Number of illegal votes cast

_____ Number of votes needed for election

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Teller Chair shall make a motion to destroy all ballots after reading the Teller Committee Report.

Members of the Teller Committee:

Name Signature Date

Name Signature Date

Name Signature Date

Name Signature Date

Retain this official report as part of the Secretary's minutes.



LOCAL PTA UNIT BUDGET APPROVAL FORM

This form must accompany the approved budget and is submitted with **Part 3: New Unit Application for Affiliation**.

Local Unit Name Local Unit Parish

The PTA's budget for the _____ fiscal year was approved at the General Membership meeting held on _____.

Attached is the Approved Budget.

President's Signature Treasurer's Signature

President's Name Treasurer's Name

SAMPLE BUDGET XYZ PTSA

July 1, 2022 – June 30, 2023

| Fundraising | Budgeted Income | Budgeted Expense | Budget Net |
|---|-----------------|-------------------|------------------|
| Color Run | \$20,000 | -\$10,000 | \$10,000 |
| Uniforms | \$15,000 | -\$7,500 | \$7,500 |
| Shake Days | \$5,000 | -\$2,000 | \$3,000 |
| Grants | \$2,000 | \$0 | \$2,000 |
| Donations | \$750 | \$0 | \$750 |
| Fundraising Totals | \$42,750 | -\$19,500 | \$23,250 |
| Student & Parent Programs | Budgeted Income | Budgeted Expenses | Budget Net |
| Reflections Program | \$0 | -\$100 | -\$100 |
| Breakfast of Champions | \$0 | -\$500 | -\$500 |
| Talent Show | \$800 | -\$500 | \$300 |
| Project Graduation | \$0 | -\$1,000 | -\$1,000 |
| Health Supplies | \$0 | -\$200 | -\$200 |
| Mental Health Speaker | \$0 | -\$1,000 | -\$1,000 |
| Grandparents Bingo | \$200 | -\$1,500 | -\$1,300 |
| Welcome Packets | \$0 | -\$250 | -\$250 |
| Newsletter | \$0 | -\$250 | -\$250 |
| Hospitality | \$0 | -\$250 | -\$250 |
| Student & Parent Programs Totals | \$1,000 | -\$5,550 | -\$4,550 |
| Teacher, School & Community | Budgeted Income | Budgeted Expenses | Budget Net |
| Staff Welcome Lunch | \$0 | -\$1,500 | -\$1,500 |
| Staff Snack Days | \$0 | -\$400 | -\$400 |
| Teacher Spirit Cart | \$0 | -\$400 | -\$400 |
| Staff Appreciation Week | \$0 | -\$1,000 | -\$1,000 |
| Library Literacy Program | \$0 | -\$2,500 | -\$2,500 |
| Beautification | \$0 | -\$1,000 | -\$1,000 |
| School Technology | \$0 | -\$7,500 | -\$7,500 |
| Teacher Mini Grants | \$0 | -\$3,000 | -\$3,000 |
| Adopt-a-PTA | \$0 | -\$1,000 | -\$1,000 |
| Teacher, School & Community Totals | \$0 | -\$18,300 | -\$18,300 |
| Administrative | Budgeted Income | Budgeted Expenses | Budget Net |
| AIM Insurance & Art. of incorp. | \$0 | -\$500 | -\$500 |
| Banking Fees & Interest | \$50 | -\$100 | -\$50 |
| Leadership & Training | \$0 | -\$500 | -\$500 |
| *Membership Dues | \$2,200 | -\$1,250 | \$950 |
| PTA Office Supplies | \$0 | -\$1,000 | -\$1,000 |
| Start Up Funds | \$5,000 | -\$5,000 | \$0 |
| Carry Forward & Ending Balances | \$12,978 | -\$12,090 | \$888 |
| Zoom | \$0 | -\$188 | -\$188 |
| Administrative Totals | \$20,228 | -\$20,628 | -\$400 |
| Grand Totals | \$63,978 | -\$63,978 | \$0 |

*Total income reported on the IRS tax filings for Membership Dues is the net amount, excluding the Louisiana PTA and National PTA dues portions.

APPLYING FOR AN IRS EIN

For new PTA units or existing units in the Reactivation Phase, search online for “Apply for an IRS EIN” and follow the link to the IRS page. Go to Step 3 and click [Apply for an EIN Online Now](#) button.

Page 1: **What type of legal structure is applying for an EIN?** Choose “**View additional types**” and select “**PTA/PTO or School Organization.**” Confirm your selection and click *continue*.

What type of legal structure is applying for an EIN?

Before applying for an EIN you should have already determined what type of legal structure, business, or type of organization is being established.

Choose the type you are applying for. If you don't see your type, select "View Additional Types."

- [Sole Proprietor](#)
Includes individuals who are in business for themselves and household employers.
- [Partnerships](#)
Includes partnerships and joint ventures.
- [Corporations](#)
Includes S corporations, personal service corporations, real estate investment trusts (REIT), regulated investment conduits (RIC), and settlement funds.
- [Limited Liability Company \(LLC\)](#)
A limited liability company (LLC) is a structure allowed by state statute and is formed by filing articles of organization with the state.
- [Estate](#)
An estate is a legal entity created as a result of a person's death.
- [Trusts](#)
All types of trusts including conservatorships, custodianships, guardianships, irrevocable trusts, revocable trusts, and receiverships.
- [View Additional Types, Including Tax-Exempt and Governmental Organizations](#)
If none of the above fit what you are establishing, there are several others to choose from.

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[Continue >>](#)

Additional Types

Choose the type you are applying for. You can click the underlined terms for a description.

- [Bankruptcy Estate \(Individual\)](#)
- [Block/Tenant Association](#)
- [Church](#)
- [Church-Controlled Organization](#)
- [Community or Volunteer Group](#)
- [Employer/Fiscal Agent \(under IRC Sec 3504\)](#)
- [Employer Plan \(401K, Money Purchase Plan, etc.\)](#)
- [Farmers' Cooperative](#)
- [Government, Federal/Military](#)
- [Government, Indian Tribal Governments](#)
- [Government, State/Local](#)
- [Homeowners/Condo Association](#)
- [Household Employer](#)
- [IRA](#)
- [Memorial or Scholarship Fund](#)
- [Plan Administrator](#)
- [Political Organization](#)
- [PTA/PTO or School Organization](#)
- [REMIC](#)
- [Social or Savings Club](#)
- [Sports Teams \(community\)](#)
- [Withholding Agent](#)
- [Other Non-Profit/Tax-Exempt Organizations](#)

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Page 2: **Please tell us about the Responsible Party.** Enter the complete legal name of the President or other Board member and their social security number. Choose “*I am a responsible and duly authorized officer or member of this organization.*” Click *continue*.

Page 3: **Where is the Responsible Party physically located?** Enter the home address of the Responsible Party. **Should the mail be directed to a specific person or department within your organization? If yes, please enter the name:** Enter the PTA name which can be abbreviated. **Do you have an address different from the above where you want your mail to be sent?** Choose Yes. Click *continue*.

Page 4: **What is the mailing address of the Responsible Party?** Enter the PTA school's complete address. Click *continue*.

Page 5: **Tell us about the PTA/PTO or School organization?** Enter the legal name and address, and leave **Trade name** field blank. Select date the PTA was established. Click *continue*.

Page 6: **Tell us more about the PTA/PTO or School Organization.** Answer to all questions is probably *No*. Click *continue*.

Page 7: **What does your business or organization do?** Scroll to the bottom and select *other*. Click *continue*.

Page 8: **You have chosen Other. Please choose one of the following that best describe your primary business activity:** Choose *Organization (such as religious, environmental, social or civic, athletic, etc.)* Click *continue*.

Page 9: **You have chosen Other: Organization. What is the primary activity of your organization?** Select **Social or civic** and type **Parent Teacher and Student Advocacy**. Click *continue*.

Page 10. **How would you like to receive your EIN Confirmation Letter?** Select **Receive letter online** if you have that capability to open and print a PDF file. Select *continue*.

Continue through the final questions. Once you receive your EIN Confirmation Letter, save it! Email it to LAPTA at office@LouisianaPTA.org.