



Application Checklist – Group Tax Exemption

- _____ **1. Membership Form**
 - This document can be found on our website under “Affiliate Membership”.

- _____ **2. Copy of IRS EIN Designation Letter**
 - Application can be done online here: <https://tinyurl.com/z7gb9pd>

- _____ **3. Copy of your bylaws, which needs to include specific IRS required wording**
 - The IRS required wording can be found here: <https://tinyurl.com/m6ajc9y>

- _____ **4. Copy of the meeting minutes that your group officially voted to become an Affiliate of PCBL**

- _____ **5. Copy of your most recent financial statement (quarterly, monthly, or annual)**

- _____ **6. Letter of Authorization**
 - After your acceptance as a PCBL Affiliate Member, you will be required to submit a year-end financial statement for the annual 990 filing. This letter authorizes the PCBL to include your financial information in the year-end filing. Your revenues and expenses will be lumped together with all of the other Affiliate Members and your individual group finances will never be shown.

- _____ **7. Articles of Association**
 - This is the document by which the IRS verifies that you are entitled to fall under PCBL's Group 501(c)(3) Tax Exemption.
 - This document can be found on our website under “Affiliate Membership”.

- _____ **8. \$150 Check**
 - This annual fee covers your Affiliate Membership for the year, January-December.

All information should be submitted with the signatures of individuals having authority to act on behalf of your organization.

This entire, and complete, packet of documents should be mailed to:

PCBL
P.O. Box 12822
Pittsburgh, PA 15241

If you have any questions regarding this procedure, please contact Sue Miller, Executive Secretary at pcblpa@gmail.com, or 1-800-870-3858.

IMPORTANT: Affiliate Membership in PCBL does not mean that PCBL will govern or interfere in your local Friends activities. You will continue to operate as you always have, electing your own officers, deciding on your own events, and making your own financial decisions. Your only obligation to PCBL is to act in concert with PCBL's mission of advocacy for libraries and to submit the annual financial statement, along with your annual Affiliate dues of \$150. Failure to abide by these requirements could result in disqualification of your tax-exempt status.