**STEP 2:**

**EXECUTIVE COMMITTEE MEETING**

The Executive Committee (elected officers) meets to set goals, develop a budget, select committee chairs, plan for membership drives, and establish communication tools. The Executive Committee Members are identified in the Bylaws. See LAPTA Toolkit for details on sample committees, membership, budgets, finances, and more. The Secretary takes minutes at all meetings including this one.

Email when the following steps are complete to President@LouisianaPTA.org:

* Create an account with PTA.org. The President notifies LAPTA President when they have done this.
* [Apply for an EIN](https://sa.www4.irs.gov/modiein/individual/index.jsp)(Employee Identification Number) with the IRS. The PTA fiscal year runs July 1 – June 30. The unit will be placed under Louisiana PTA group tax exemption.
* Apply for Articles of Incorporation at the Louisiana Secretary of State at *geauxbiz.com*. Initial cost is $75.Do not use the principal as the Registered Agent.
* Establish a 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 such as meeting minutes that name the elected officers and the appointed bank signers (at least 3 signers). Debit cards may be ordered by the authorized signers with the PTA name on the card except in Caddo Parish. See *LAPTA Toolkit: Treasurer* for banking details.
* Establish a givebacks.com site to collect dues and share information. LAPTA will assist with this step.
* Pay membership dues to LAPTA at LouisianaPTA.org/membership. Once this is completed, National PTA will issue the PTA Charter and “Local Unit Registration Number” (LUR).
* Set a date for a General Membership Meeting and advertise it to the community with at least 20 days’ notice. Share the flyer or communication with LAPTA.
* All Board members need to register at LouisianaPTA.org/register and participate in LAPTA training.
* Create PTA emails for all Board members such as ABCPTA.pres@gmail.com.

**APPLYING FOR AN IRS EIN**

To apply for an EIN, go to <https://sa.www4.irs.gov/applyein/legalStructure> on the IRS website. Do not use a third party website because they will charge a fee. If you get to the end and they request a fee, you are not on the IRS site.

1. Page 1: **What type of legal structure is applying for an EIN?** Choose “**View additional types**” and select “**PTA/PTO or School Organization**.” Confirm the selection and click *continue*.
2. 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*.
3. 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 the 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.*
4. Page 4: **What is the mailing address of the Responsible Party?** Enter the PTA school’s complete address. Click *continue.*
5. 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*.
6. Page 6: **Tell us more about the PTA/PTO or School Organization.** Answer to all questions is probably *No*. Click *continue*.
7. Page 7: **What does your business or organization do?** Scroll to the bottom and select *other*. Click *continue*.
8. 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.)*
9. 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*.
10. Page 10. **How would you like to receive your EIN Confirmation Letter?** Select **Receive letter online** if you have the capability to open and print a PDF file. Select *continue.*
11. Continue through the final questions.Once the EIN Confirmation Letter is received, save it permanently! Email it to LAPTA at President@LouisianaPTA.org and Office@LouisianaPTA.org.

**ARTICLES OF INCORPORATION**

Louisiana requires all non-profits to register with the Louisiana Secretary of State at geauxbiz.com. Cost is $75. The Articles of Incorporation are kept permanently on file. Use the NAICS number **813410** (Other; then Civic & Social Organizations). After creating an account at geauxbiz.com using an email associated with the PTA and adding the login to your Password Summary Sheet, click “Get Started.”

1. Select “Register a Louisiana business just starting up.” Select “Start New Business Filing, and then “Corporation (Profit or Nonprofit),” “Domestic,” and “Nonprofit.”
2. Select “No Accounts Needed,” “No” employees, and “No” the business is not subject to FUTA.
3. Enter the full PTA name without abbreviations other than PTA without periods.
4. Check “ Engaging in lawful activity…”, enter “Perpetual” for the duration, use the school’s physical address and phone for both entries, and click Next.
5. Select “Person” and enter the president’s info as the registered agent and the other officers as directors. The principal is NOT listed as a registered agent.
6. Enter 100% for the percent
7. Enter a signature and follow the rest of the steps.