



New Agency Application Checklist

You will need the following:

- Federal EIN #
- Incorporation/DBA official Documents
- Description of Program Services in 25 words or less
- 501c3 Determination Letter
- Agency Statement of Program Activities (25 words or less)
- Most current Tax Filings Form 990 and CHAR500 (within 18 months), if exempt – Exemption Letter is required
- Charities Registration Bureau #
- Most current audited financials (within 18 months)
- Administrative and fund raising (AFR) percentage. Must be under 25% or submit plan to decrease percentage. Corrective Action Plan if over 25%
- Most current Federally Approved Indirect Paperwork (within 18 months), if applicable
- Patriot Act Compliance Form
- Vendor Rep Certification
- Non-Discrimination Certification
- Statement Certifying agency abides by SEFA policies and procedures and annual solicitation campaign rules

Please note that all signatures must be authorized signatory for your agency (Board Officer, Executive Director, CFO, etc.)