



## AGENCY RECERTIFICATION CHECKLIST

### Your agency will need the following:

- Federal EIN
- 25-word or less Agency Description. Excess words will be cut off.
- NYS Charities Bureau Registration number
- Most recent audited financial statement (within 18 months)
- Most recent IRS 990 form to use in the automated calculation of the Administrative and Fundraising Rate (AFR) percentage. The AFR must be under 25% or you must submit a Corrective Action Plan to decrease the percentage.
- Current Federally Approved Indirect Cost Documentation (dated within 18 months), if applicable.
- NYS Vendor Responsibility Certificate from the Office of the New York State Comptroller. Instructions and sample certificate are on our website.

### The below forms are available on our [SEFANYS.org](http://SEFANYS.org) website:

*(hover over 'Charities & Federations' and click on 'Agency Recertification')*

Please download, print, complete and save as PDF files. You will need to upload these forms directly to the application.

- Patriot Act Compliance Form
- SEFA Charity EFT Financial Contact Form with voided check/bank verification letter
- SEFA Agency Application - Recertification Statement

**Please note that all signatures must be from an authorized signatory for your agency (Board Officer, Executive Director, CFO, etc.) and must be dated where specified.**