Charitable Organization Registration in Oklahoma
Information & Instructions

Oklahoma Secretary of State, 421 N.W. 13th, Suite 210, Oklahoma City, OK 73103
Telephone (405)-522-2520

The Oklahoma Solicitation of Charitable Contributions Act, Title 18, Section 552.1a of the Oklahoma Statutes applies to any charitable organization which shall solicit or accept contributions from any person in Oklahoma by any means, except those specifically exempt under Section 552.4. (See reverse side of this instruction sheet.) This information is intended to assist with the **REGISTRATION** of a charitable organization in Oklahoma pursuant to the provisions of the Act. **Please consult the act carefully.**

REGISTRATION PROCEDURE

PREPARE and **SUBMIT** to the Secretary of State:

1. One (1) **original** of the fully completed **registration statement**, executed by signature, without more, of the person or persons signing the form, in which case the signature or signatures shall constitute the affirmation of the signatory, under penalty of perjury, that the signature is that person's act and deed or the act and deed of the organization, and that the facts states therein are true.

2. If the solicitation is to be conducted in whole or in part by professional fundraisers, one (1) **"Professional FundRaiser Information" Attachment**, Form 101A.

3. For the initial registration of a newly formed charitable organization, a copy of a letter from the Internal Revenue Service, or other evidence, showing that such organization is exempt from federal income taxation; or, for a charitable organization that has not applied for federal income tax exemption with the Internal Revenue Service or is not required to apply for federal income tax exemption, evidence showing that said charitable organization is organized in any state or jurisdiction as a not-for-profit entity. (Required by Title 18, Section 552.3-A8)

4. One (1) complete **list of the name, mailing address and title or position of <u>each</u> officer, <u>each</u> director, and <u>each</u> trustee, and/or equivalent, and each salaried executive employee** of the charitable organization.

5. A check or money order in the amount of **$65.00** made **payable to the Oklahoma Secretary of State** must be attached if anticipated contributions exceed $10,000.00, or **$15.00** if anticipated contributions do not exceed $10,000.00.

6. When filing is completed, a statement of receipt and certificate will be mailed to you.

REGISTRATION INFORMATION

REGISTRATION RENEWAL: A registration is valid for a period of **one (1) year** from the date of filing with the Secretary of State and **<u>MUST</u>** be renewed annually. A renewal registration statement may be submitted in the same manner as the organization's initial registration **on or before the anniversary of its registration**.

REGISTRATION UPDATES: If a charitable organization that is registered with the Secretary of State to solicit contributions in this state changes its name or the mailing address of its principal office, or plans to engage in the solicitation of contributions using a name that is not listed on its registration form, then it shall, prior to soliciting any funds in this state using any such name, file with the Secretary of State a statement executed by an authorized officer of the organization setting forth any new name and mailing address along with a fee of Twenty-five Dollars ($25.00).

PLEASE NOTE: Title 18, O.S., Section 552.4 pertains to persons and organizations that are **exempt from the requirement to register with the Secretary of State**. Be advised that this office **CANNOT** make the determination as to whether a person or organization conforms to one of the exemptions listed. That decision is the responsibility of the organization.

Title 18, O.S. Section 552.4. Persons and organizations exempt

Except as otherwise specifically provided in the Oklahoma Solicitation of Charitable Contributions Act, the provisions of Sections 552.3, of this title shall not apply to the following persons:

(1) Organizations incorporated for religious purposes and actually engaged in bona fide religious programs, and other organizations directly operated, supervised, or controlled by a religious organization;

(2) Educational institutions that have a faculty, regularly enrolled students and offer courses of study leading to the granting of recognized degrees when solicitations of contributions are primarily confined to its student body and their families, alumni, faculty and trustees and any 501(c)(3) organization authorized by and having an established identity with such institutions;

(3) Fraternal organizations, when soliciting from their own members, and patriotic and civic organizations, when solicitation of contributions is confined to the membership of said organizations, and the solicitation is managed by their own membership without paid solicitors; and

(4) Persons soliciting contributions for a named individual person, when such individual person is specified by name at the time of solicitation, the purpose for such contribution is clearly stated, and if the gross contributions collected, without any deductions whatsoever for the benefit of the solicitor or any other person, be deposited directly to an account in the name of the beneficiary established for that purpose at a licensed local bank, and if such contributions are used for the direct benefit of the named individual person as beneficiary.

FILING FEE: $65.00 for contributions exceeding $10,000.00

INITITAL/RENEWAL: $15.00 for contributions that do not exceed $10,000.00

UPDATE/AMENDED - $25.00

PRINT CLEARLY

Registration Statement of Charitable Organization

☐ **Initial Registration** ☐ **Renewal** ☐ **Update**

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1. The legal name of the charitable organization:

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2. Any trade name(s) the charitable organization uses, any other name the organization may be identified or known as, and any distinctive names the organization uses for the purposes of solicitation of contributions:

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3. The mailing address of the charitable organization:

Street City State Zip Code

4. The period(s) of time during which such solicitation is to be conducted:

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5. An identification of the specific method or methods of solicitation utilized by the charitable organization and its agents:

☐ personal contact ☐ direct mail ☐ telephone

☐ television ☐ radio ☐ other _____

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6. Solicitation will be conducted by the following for or on behalf of the charitable organization:

☐ Professional Fundraisers
☐ Employees or volunteers of the charitable organization
☐ and/or Others

7. The purposes for which the contributions solicited or accepted are to be used:

8. The name and mailing address of each professional fundraiser or professional solicitor that will have custody of the contributions:

Name	Address	City	State	Zip Code

9. Each <u>person</u> associated with a professional fundraiser, professional solicitor **OR** charitable organization that is directly responsible for the payment and distribution of funds collected:

Name	Address	City	State	Zip Code

10. The name and mailing address of each professional fundraising counsel utilized by the charitable organization:

Name	Address	City	State	Zip Code

11. For charitable organizations that register for the first time, a statement whether or not the charitable organization believed contributions for the first year of registration will exceed Ten Thousand Dollars ($10,000.00)

☐ **Yes** ☐ **No**

REQUIRED FINANCIAL INFORMATION

12. The gross amount of the contributions, gifts, grants and other similar amounts received by the charitable organization:

13. The total Program Service Expenses of the charitable organization:

14. The total Management and General Expenses of the charitable orgaization:

15. The total Fundraising Expenses of the charitable organization:

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16. The aggregate amount paid, or payable, to professional fundraisers and professional fundraising counsel:

REQUIRED ATTACHMENTS

17. If the solicitation is to be conducted in whole or in part by professional fundraisers, you **must** complete and attach Form 101A, the Professional Fundraiser information page, to the Registration Statement.

18. For the initial registration of a newly formed charitable organization, a copy of a letter from the Internal Revenue Service, or other evidence, showing the that such organization is exempt from federal income taxation; or, for a charitable organization that has not applied for federal income tax exemption with the Internal Revenue Service or is not required to apply for federal income tax exemption, evidence showing that said charitable organization is organized in any state or jurisdiction as a not-for-profit entity.

19. The name and mailing address of each officer, director, trustee, and/or equivalent, and each salaried executive employee of the charitable organization.

EXECUTION AND ACKNOWLEDGMENT

Any registration form required to be filed under this section shall be executed by signature, without more, of the person or persons signing the form.

I, the undersigned, under penalty of perjury, have caused this registration to be executed this_____day of _____,_____; and that the contents of the application are true and complete.

_____

Signature

_____

Type or Print Name

_____

Title

CHARITABLE ORGANIZATION REGISTRATION ATTACHMENT
Professional Fund Raiser Information

(Complete one (1) form for <u>each</u> professional fund raiser. Form may be duplicated.)

a. Legal name of the Professional Fundraiser:

_____

b. Street & P.O. Box address _____

c. Location of offices used by them on behalf of your organization

_____

d. Simple statement of services provided

e. Describe the basis of payment or other consideration payable to each professional fundraiser and the nature of the arrangements between the charitable organization and each professional fundraiser.

f. Specific amount, formula or percentage of compensation, or property of any kind or value to be paid or provided to each professional fundraiser:

_____

j. If payment is based on a percentage, the amount of compensation as a percentage of:

(1) Total contributions received: _____

(2) Net amount of the total contributions received: _____

(total contributions received, less expenses of solicitation other than amounts payable to any professional fundraiser)

Oklahoma Secretary of State
Request to receive
documents electronically

No need to wait on your filed documents to be mailed back to you. If you would like your filed documents returned electronically, please complete and attach this form to your documents. Complete ALL information below to receive an email which will contain a link to retrieve your filed documents. (Please print or type clearly.)

☐ **Return filed documents electronically**

Receipt will read as follows:

PERSONAL or BUSINESS NAME: _____

MAILING ADDRESS: _____

CITY, STATE & ZIP CODE: _____

PHONE OR CELL: _____

EMAIL ADDRESS: _____

(It is critical that the email address is correct, or you may not receive the notification of filing)