Hello, my name is Audrey Blodgett. And I'm a paralegal with the New Hampshire Attorney Generals Charitable Trust Unit, and I'm excited to be here to share the new E forms we have on our website that are now available for online filing. Our first form I want to review is our application for registration. You can get to that form from our web page on our welcome to the Charitable Trust Unit page. Go down to our CTU forms and reports box. You can either click the application for registration here or click the all forms to see all of our forms, any form available for on line filing has this file on line logo. I'm going to click on the application for registration here. And we're going to go to our portal. We have some general instructions for our application which include a link to the paper instructions for the application as well as a list of documents and information you should have available before beginning entry, I want to particularly point out this authorization form. This form is for used by third party filers. On the right hand side of our screen we have some FAQ and contact information for the unit including our address, phone number and email addresses. And if you want at the bottom of the page you can click this print blank form button here on the right to create a PDF of the application which you can then review to make sure you have all the information you need before entry. We're going to click on begin form entry and it's asking me to sign in. If you're not registered with our portal, you will have to first click this register button. And it will ask you for some basic information like name, telephone number, your email address and will ask you to create a password. I'm already registered, so I'm going to enter my email address. And my password. And I'm being moved into the portal and once again we're at the General Instructions page and we're going to click on begin form entry. On the left hand side of the screen you can see the form is divided into separate sections. You can jump from section to section, but if a required field indicated by this red asterisk isn't completed, you cannot submit your form. Also note here. It tells us that the registration fee for this document is going to be $25 at the end of the entry of the form and before we submit it, you will be asked for your credit card information to pay this fee, we will accept Visa or MasterCard. On the right hand of the screen you'll see you save Progress button anytime you need to leave the form, you can click on this and the next time you go into the program, click on this History tab to open the saved form and continue with your entry. So let's fill in some information. I put a fake name here. . And number. Now you notice that if you hover over these little eyes on the right hand side of the of the field, you will get some help tips which could come in useful for entry in this form. I'm going to say that our fiscal year ends in December. And I'm going to enter a mailing address. If your mailing address is a PO box or something like that and you have a physical address also complete that. If you are operating under a different name other than your legal name, a trade name or DBA type name complete this here and if you have a website, enter that information. And this is where the authorization form comes in. If you are a third party filer, click yes. And it will give you a chance to upload the authorization form. You can click this link to the form itself, print it, have your client complete it, and then we can upload it. If you are not a third party file or click no and that window goes away. We are asking for a contact name. with a phone number So that if we need to get ahold of you we can do that easily. As well as an address. Out of state organizations registered in New Hampshire can complete this field here. If you do have a. Sorry if you do have a resident agent in New Hampshire. Our next section is form of organization. We have the different types of organizations here, whether you're incorporated whether you were created through another method, like an Association or created through a trust or a court order. You can see that it does have a little bit of a description on what each type is, and if you go down to the field form of organization and click the down arrow, you can choose which one you are. Note that it does give you a list of the documents for each type that will need to be uploaded. I'm going to say we are a charitable Corporation. And I'm going to say that we were incorporated this January. And we were incorporated in New Hampshire. So now it's asking me to attach the documents that are listed here under our first field in this section. So I'm going to choose file. And I have some sample documents here. I'm just going to choose our articles of incorporation. And as a Corporation I should also have bylaws, so I'm going to upload those. And you can see down here it's listing the documents that you are uploaded to this window. Our next section is the IRS exemption section. Have you received a tax exempt letter from the IRS? This is known as the IRS letter of determination and it states which section of the IRS called code you Fall under. If you say yes, we're going to ask you what section that is. So I'm going to say you're I'm a 501C3. If you say other like 501 C 19, which is a veterans group. It's gonna ask you what that is. So I'm gonna go back to 501C3. And I'm going to choose a file to upload a copy of that letter. If I say no to that first question. All those windows disappear and it's going to ask you why you haven't received that yet. And you just need to pick the most appropriate choice. Our third section, well 4th section is additional information. We're going to ask for board members now. You can note that out of state organizations only need to attach of the a copy of the Board list reported in its latest filing with the IRS. New Hampshire organizations. We need a little bit more information and you have a choice. You can either upload an existing list. Or you can complete a table by clicking this add row button. And adding your um? Adding your information here as we go along. When you want to add your second board member? Board member click Add now if you want to add a third, just keep on clicking the add row button until you have all your board members listed. We are also asking for some sort of financial information, as explained here. So if you're a brand new organization, you obviously aren't going to have much, but we will accept a bank statement showing that your bank account has been opened in the name of the entity. Just something showing your organization has a bank account in its name and not in an individual's name. If you are an older older organization and have filed a 990, 990 EZ or 990 PF with the IRS we will accept the most recent filing. Down here we're going to ask for your conflict of interest policy. Most of the time that policy is part of your bylaws, so just indicate the document and the article number where we can find that. If your conflict of interest policy is a separate document, you can upload that here. And we're also going to ask for your dissolution provision again, that is usually in your articles. So just tell us where we can find it. Or again, if it's in a separate document, you can upload that here. Our last section is the acknowledgement. After completing it, you can review the document as one long form. By clicking on this review button. If it looks OK and there's no red sections noted on the left, require indicating required fields were not completed. You can click on certify and submit. So this is the whole long document, however, you know, I seem to have forgotten a required field. Additional information is highlighted in red. I'm going to go back to that section, see if I can find the field where it's red. I need to upload a file I forgot to upload my bank account statement. So I'm going to choose. And attach. That red disappears. I'm going to go back to review. No other red appears here, so I'm going to click on certify and submit. Once you read the this certification, you can click on submit form and you will go to the payment page. As I said before, we will accept Visa and MasterCard. We are working on getting E Check authorization we're not quite there yet. You know there's an option here to pay later. Please note, if you choose that option, we will not accept the filing so click pay on line. This will take you to the payment processor where you will enter your credit card information for the filing fee. After completing that and clicking on submit, the form is finished. You will receive an email with a link to your submission so you can check the status and review any notes to the file entered by the CTU reviewer. You can also check your status through the History tab. This completes our demonstration of this new form. Once your filing is submitted, it will be reviewed by CTU personnel and either a Certificate of Registration will be issued or you will be contacted if we have any questions. Once a decision is made, and documents created, the status will be changed to issued. So if you check your status, we and its issued, you know that we've approved the registration After your organization has completed its registration and received a certificate, it will be required to file annual reports every year. This reporting form our Form NHCT 12 is also available for E filing and is due 4 1/2 months after the end of your fiscal year. Feel free to contact the CTU if you have any questions.