



## Instructions for Regional Associations to File for 501(c)3 Non-Profit Status Through Princeton University

Princeton University is pleased to allow its alumni class and regional associations to file for non-profit status with the U.S. Internal Revenue Service as a subsidiary organization under Princeton's 501(c)3 group tax-exemption. Benefits of participation include the tax-deductibility of membership dues and coverage under the University's insurance policy for alumni organizations.

For those associations which have never filed for tax-exempt status independently of the University, the following guidelines outline the necessary steps to join Princeton's group non-profit status.

1. **Contact the Office of Alumni Engagement** – Please review your intention to apply for this status with the Regional Affairs staff at the Office of Alumni Engagement (listed with contact information at this document's end), so we can advise you as to any special circumstances that pertain to your regional association.
2. **Appoint Officers** – If not already in place, the association must elect or appoint alumni to fill lead officer roles such as president, vice president, secretary, treasurer, and Alumni Schools Committee chair.
3. **Adopt a Constitution** – Even if the regional association has existed for many years, if neither the local association members nor the University has a group constitution on file, the officer corps must complete and file a new constitution. The Office of Alumni Engagement has a standard constitution template available upon request. Once this document has been completed, the regional association must officially adopt the constitution.

Unincorporated organizations may adopt the constitution merely by resolution of their executive committee, directors, trustees or officers. This resolution could be as follows: "RESOLVED, that the officers/directors/executive committee/trustees of [organization name] do hereby adopt the attached Constitution for and on this \_\_\_ day of \_\_\_, 20\_\_\_. FURTHER RESOLVED, that the members of [organization name] be asked to ratify and confirm the Constitution and the foregoing Resolution at the next meeting of the members."

Then, at the next convenient opportunity (such as an annual meeting or event with good attendance), the membership should adopt a resolution ratifying that action. This resolution could be as follows: "Resolved, that the members of [organization name] do hereby ratify and confirm the attached Constitution of [organization name]."

4. **Authorization Letter** – As soon as the new constitution has been adopted, a letter on official letterhead (which can be supplied by the Office of Alumni Engagement upon request) should be addressed to "The Trustees of Princeton University" but sent to the attention of Robert Burness, Esq., Office of the General Counsel, Princeton University, New South Building, 4th Floor, Princeton, NJ 08544. The letter should state that your alumni association has ratified the adoption of a constitution and that you would like to be included in the University's group tax-exemption. [IMPORTANT – A copy of this letter should also be sent to the Office of Alumni Affairs.]
5. **Taxpayer Identification Number** – When the Counsel's office receives a copy of the constitution and resolution, they will submit an application for a Taxpayer/Employee Identification Number (EIN) for your association. [An EIN is a number issued specifically to your organization and should not be confused with the ID number for Princeton University or with the Social Security number of any officer of your organization.]
6. **Effective Date** – The effective date of your inclusion in Princeton's group exemption policy will be the date of your association's request for inclusion, and does not depend upon further IRS review or approval. Upon receipt of the EIN, the University will issue a letter confirming your official participation in the Group.



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In addition to adopting a constitution, all associations are strongly advised to create by-laws that establish rules of local leadership and operation. By-laws provide further details regarding governance and operations for a regional association and should be updated on a regular basis. If you are unsure whether your regional association has ever created by-laws, please contact the Regional Affairs staff; if not, a customizable by-laws template can be provided.

If you have additional questions, please contact the Regional Affairs staff at the Office of Alumni Engagement:

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