

INCORPORATION CHECKLIST

- _____ 1. The Church Council or the Board of Trustees recommends to the Charge Conference that the local church incorporate.
- _____ 2. District Superintendent authorizes convening of Charge Conference for the purpose of incorporating local church and transferring church's property to the new church corporation.
- _____ 3. Provide notice to congregation of time, place and purpose of Charge Conference.
- _____ 4. Hold Charge Conference. May use enclosed "Charge Conference Resolution" instructing the Board of Trustees to incorporate the church, naming the incorporating trustees, and authorizing the transfer of church property to the new corporation
- _____ 5. Board of Trustees selects attorney(s), incorporator(s), and registered agent. Trustees approve, using enclosed "Board of Trustees Resolution".
- _____ 6. Attorney prepares enclosed Articles of Incorporation and if requested orders a seal (optional). The initial incorporator(s) executes the Articles.
- _____ 7. If the church owns real property, an attorney will prepare deeds transferring the unincorporated church's property to the new church corporation.
 - _____ a) Verify that there are no unusual restrictions in the chain of title to the church property that would prevent it from being assigned to a new church corporation.
 - _____ b) Include in the deed(s) the proper trust clause from ¶ 2503.
 - _____ c) If real property is under mortgage, it may be necessary to get the lender's prior approval to deed the property to the new corporation. Bank may require new church corporation to ratify, guarantee, or re-execute loan documents.
 - _____ d) The trustees execute the deed(s) on behalf of old unincorporated church.
- _____ 8. File: original and one copy of Articles with the Secretary of State; deed(s) at the county courthouse.
- _____ 9. Corporation's Board of Trustees holds organizational meeting. Approve and execute enclosed "Waiver of Notice", "Minutes", and "By-Laws".
- _____ 10. If the church does not have a federal employer identification number (EIN), request one from the IRS using [Form SS-4](#). On line 8a, enter the UMC's General Exemption Number (GEN) which is 2573.

- _____ 11. Consult with a local attorney to determine the necessity of filing any applications for exemption in relation to property taxes, or other similar documents.
- _____ 12. Verify with your insurers (property, liability, vehicle, workers compensation, etc.) whether changes are required in your various insurance coverages.
- _____ 13. Be aware that other licenses or contracts may need to be adjusted to reflect the church's new status as a nonprofit corporation. Consider status of other church programs offered to non-members such as day care program or pastoral counseling center.

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