



## Trust Renewal

**Purpose:** A renewal is submitted annually and is due by the end of the 11th month after the end of the fiscal year. A renewal can be submitted any time after the financial information that is due is finalized.

All information, except the financial information and tax document, will be pre-populated. The organization may update the pre-populated information as needed. Below are the instructions for what is required in each section if updating is needed.

If there are issues submitting the Trust Renewal please review our Online Instructions Frequently Asked Questions on our website at: <https://www.sos.wa.gov/charities/> If additional assistance is needed you may contact our office by emailing charities at: [charities@sos.wa.gov](mailto:charities@sos.wa.gov)

- **Organization Name:** Provide the organization's name. If the organization provides a UBI Number (9-digit Unified Business Identifier) that is recorded with the Secretary of State Corporations Division, the name **must** match the business name on record. If the organization name has changed, the Trust will need to upload the documentation that changed its name under the "upload additional documents" section.
- **FEIN (Federal Employer Identification Number):** Provide the organization's FEIN. If the organization does not have a FEIN, you can apply at <https://www.irs.gov/> **A FEIN is required for registration with the Charities Program.**
- **UBI Number:** Is a 9-digit number issued by several state agencies (OSOS, L&I, ESD, DOR-BLS etc.) which allows the organization to do business in Washington State.
- **Summarize Charitable Purpose:** Provide the organization's purpose/mission. If the purpose is longer than 500 characters; provide as much of the purpose as able and then upload the full purpose as an attachment in the "upload additional documents" section at the bottom of the online form.
- **Federal Tax Exempt Status:** If the organization has received a federal tax exempt status from the IRS select "Yes". The organization will need to upload its IRS determination letter that was provided from the IRS. If the organization does not have the IRS determination letter you may upload a statement attesting that the organization has been provided this status from the IRS. If the organization is a part of a **Group Exemption**, a letter from the central organization confirming its relationship with the registering organization is required to be uploaded with a copy of the central organization's IRS determination letter.
- **Trust Beneficiary:** If necessary, the Trust's charitable beneficiaries can be listed. Provide the name and address of the charitable organization that the Trust designates as a beneficiary. Select "add new charity", if there are more than one the Trust may continue adding charities.
- **Organization name look up:** The organization name will be pre-populated; if the name has changed select "look up" to ensure the new organization name is available.
- **Organization email:** Provide the email address for the general public to be able to contact the organization. Confirm the email address by entering again in the confirm organization email section. This email address will also receive notifications from our office.
- **Organization website:** If the organization has a website enter it the format of [www.website.com/org/net](http://www.website.com/org/net).
- **Phone number:** Provide the phone number for the general public to be able to contact the organization, this may include an extension if applicable.



- **Mailing address:** Provide the mailing address of the organization. If outside of the United States, the country can be selected from the drop down menu. The screen parts will adjust to the country that is selected.
- **Street address:** Provide the physical address of the organization. If the same as the mailing address you may select the check box to autofill the street address. The street address cannot be a PO Box or PMB. If the organization does not have a physical address provide the zip, city, and state. If the state is Washington, the organization will need to provide the county as well.
- **Do you use any other addresses for solicitation:** If the organization uses different address(es) for solicitation from the mailing/street address select “Yes” and upload a list of the other addresses used.
- **Financial information:** Provide the financial information for the fiscal year being requested. In the Financial Report if there is no financial information to report for a specific line enter zero. If the fiscal year is different from the year being requested or the beginning gross assets pre-populated from the previous fiscal year-end ending gross assets are incorrect a trust amendment and the amended tax document will need to be submitted by mail for review and successfully filed prior to being able to submit a renewal.
- **IRS tax document type: Prior to uploading the tax document remove the Schedule B.** If the file is larger than 10MB the tax document will need to be separated into multiple uploads in this section.
  - If the organization files a tax form that is not one of the options, we ask that you select 990N and our office will be able to update to “Other” when additional updates are made to our system.
- **Officers Directors Trustees:** A minimum of one person or officer accepting responsibility for the organization must be provided. Enter each person’s name, title, phone number, and address. If the person’s address and phone number are the same as the organization’s mailing address select “contact information same as organization” and this information will be pre-populated for you. After entering the information select “add new officer”, the name will be added to the persons accepting responsibility grid. You may follow these steps to add each person needed. Enter each name needed and do not upload a list.
- **Financial Preparer:** If financial information has been provided the system will require a financial preparer. Select if the financial preparer is a business or an individual. Provide all information, business name if applicable, first and last name, title, and address.
- **Legal Information:** *Legal Actions include any **administrative** or **judicial** proceedings alleging that the organization or any individual in its registration has failed to comply with these rules, RCW 11.110, or state or Federal laws pertaining to taxation, revenue, or record-keeping, whether such action has been instituted by a public agency or a private person or business.*
  - If a new legal action has taken place or one has not previously been reported to our office, provide the court’s jurisdiction, case number, title of legal action, and the date of legal action then select “add legal information”. Multiple legal actions can be provided. For each legal action upload the court documents under this section.
- **Trust Directory:** Select “Yes” to participate in the trust directory. If “Yes” is selected the organization will need to select if it is a Grantmaker, Grant Seeker, or both. Once selected additional options and selections will need to be completed based on the organization.
- **Return Address for this Filing:** If provided, the confirmation regarding this specific filing will be sent to this address, in addition to the organization’s mailing address.
- **Upload additional documents:** This section is used to upload additional documents as needed.
- **Signature/Attestation:** Select the box next to “by executing this document, the applicant certifies the following”. Provide the first and last name and a contact phone number.



**WASHINGTON**  
**Secretary of State**

Corporations & Charities Division

Corporations & Charities Division

**Physical/Overnight address:**

801 Capitol Way S

Olympia, WA 98501-1226

**General contact information:**

[sos.wa.gov/contactinfo](https://sos.wa.gov/contactinfo)

- When completed you will be able to select continue and be brought to a review screen, confirm that all information is correct and then select add to the cart.
- Once at the shopping cart select the organization's submission and select check out, you will then be able to review the amount to be paid and select "proceed to checkout". The system will automatically calculate the fees that will need to be submitted once added to your cart.
- Once at the checkout screen provide the payment information and place your order.
- There are no additional processing fees for using our online filing system when filing charities documents. Once the registration is completed, either automatically or once it is reviewed by a charities team member, you will be able to access the organization's confirmation letter and file stamped documents under the "notices and filed documents" tab on the user dashboard.