

Association Exemptions: FIRST STEPS and IMPORTANT DATES

By May 1, 2023:

1. Complete the Association Questionnaire (Google Doc) including following the embedded link to see if the Association can file a Form 1023 EZ instead of Form 1023 (long form) and to provide other pertinent information.

QUESTIONNAIRE – please complete:

https://docs.google.com/forms/d/e/1FAIpQLSed5OrqBL_UgnyuVfpMh6PsKiOli6ePTtLlq_Wdz54OuEKGJQ/viewform?usp=sf_link

2. Contact and consult your tax professional to assist in the tax exemption application process. Be sure to also have your Articles of Incorporation reviewed for necessary requirements. Simone Terry can provide more details on this potential pitfall in the process.
3. Contact the AEC chair, Simone Terry and Sara Reese with any questions during the process. We may refer you to other resources.
 - a. Simone Terry coachsimoneterry@gmail.com
 - b. Sara Reese sara.reese@usatf.org
 - c. Dave Shrock aecchair@usatf.org

By June 30, 2023:

4. Each Association to update National Office and AEC with progress report. A reminder email or document will be sent with a reply requested

Aug 31, 2023:

5. National Office will continue to file a Group Exemption and will distribute the standard Wufoo form for all associations to respond to

****Nov 1, 2023**

6. **Target Date for all Associations to have FILED for own exemption**

IMPORTANT – This does NOT mean a determination response will have been received from the IRS or that the process will be complete. That is not under the control of the Association or the National Office.

Dec 1, 2023:

7. Each Association to update National Office and AEC with progress report. A reminder email or document will be sent with a reply requested.

2024 (if needed)

8. Ongoing monitoring will continue and Group Exemption Filing will remain an option until all determination letters are received.