



## How to Obtain a Tax ID

In order for a Chapter to establish a bank account with a financial institution, you must first set up an IRS Federal Employer Tax ID Number. The quickest way for a Chapter to apply for a Tax ID Number is online. You can do this right away – it takes less than ten minutes to obtain a Tax ID Number online.

### ONLINE

Go to the following website to obtain the Form SS-4 and instructions:

- Form & "Do I Need an EIN?": <http://www.irs.gov/pub/irs-pdf/fss4.pdf>
- Instructions: <http://www.irs.gov/pub/irs-pdf/iss4.pdf>
- Online Application: <https://sa1.www4.irs.gov/modiein/individual/index.jsp>
- Online EIN instructions:  
<http://www.irs.gov/businesses/small/article/0,,id=102765,00.html>

Here are the details you should fill out during the course of the application:

- Group/organization type: Community or Volunteer Group (you may need to select "additional organization types" on the online application)

Because your Chapter will only need this number for banking and tax purposes, you will only need to complete the following lines (as of June 2011); please refer to the "Do I Need an EIN?" document above and look under "Need an EIN for banking purposes only" for the specific lines that you need to fill out, in case line numbers change.

- Fill out the Chapter's official name in **Line 1** (Phi Sigma Pi – Omega Zeta Chapter, for example)
- Skip Line 2.
- For **Line 3**, enter the Treasurer's information (preferred) or the President's information
- For **Line 4a** and **4b**, use the **organization's** on-campus address. This can be your adviser's mailing address if your Chapter does not have an on-campus address readily available. If you don't have an on-campus address yet, use the address for the student life office or the office that will directly oversee your Chapter.
- For **Line 5a** and **5b**, use the address for the person you listed in Line 3.
- Skip Line 6.
- **Line 7a** and **7b** is not necessary, but if you can, get your Chapter adviser to complete the tax form and place his/her information in line 3, 7a, and 7b. It's okay if your adviser doesn't wish to provide this information or if you cannot obtain this information. The information in these lines will only be used for verification purposes and will not in any way be connected with the Chapter beyond verification.
- For **Line 8a**, check the "No" box. Do not fill out Line 8b.

- For **Line 9a**, check "Other Non-Profit organization" and list "Fraternity. Do not fill out Line 9b.
- For **Line 10**, check the box for "Banking Purpose" and list "Opening Account".
- Skip Line 11 through 17.
- For **Line 18**, check "No" unless the organization had applied for an EIN in the past.

## **PHONE**

You may also call **(800) 829-4933** to talk to an IRS representative. The average wait to reach a human being is one to two minutes. It helps to have a completed Form SS-4 in front of you, because the agent will ask you many of the same questions.