



# Obtaining a Tax Identification Number

Having an IRS Federal Employer Tax ID Number is integral to a Chapter's ability to establish a bank account with a financial institution.

A Chapter can apply for a Tax ID Number online. It takes as few as 10 minutes to obtain a Tax ID Number.

Here are instructions and the Form SS-4:

**Form SS-4 and "Do I Need an EIN?"**

**Form SS-4 Instructions**

**Online Application**

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 Advisor's mailing address, or the Student Life Office if your Chapter does not have an on-campus address readily available.
- For Line 5a and 5b, use the address for the person you listed in Line 3.
- Skip Line 6.
- Line 7a and 7b are not necessary, but if you can, get your Chapter Advisor to complete the tax form and place their information in Line 3, 7a, and 7b. It's okay if your Advisor 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.

You may also call (800) 829-4933 to talk to an IRS representative. The average wait to reach an agent 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.