



# New Nonprofit Registered for Nationwide Fundraising Case Study

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## Highlighted Results

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*Complete and accurate filing of registrations for each state*

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*Follow up to assure registration approval*

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*Annual renewals for each state filed accurately and on time*

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*Nationwide fundraising proceeds without delay*

### Featured Project

A newly formed not-for-profit with a very high profile mission needed to assure that their fundraising efforts across the United States would be properly sanctioned by all states.

### The Challenge

The organization was eager to raise funds and had several initiatives planned but it first needed to be properly registered to do fundraising in all states.

Each state has its own unique reporting forms, deadlines and requirements. Initial registrations for every state needed to be completed on a timely basis to coincide with nationwide fundraising initiatives. In addition, proper annual renewals for each state, with any and all additional required documentation, would need to be filed accurately and on time.

### The Legacy Group Execution

The Legacy Group

- Identified the appropriate government entity in each state with whom the charitable registrations had to be filed.
- Obtained the appropriate forms, analyzed requirements, and created a checklist to assure complete and accurate filings.
- Completed and mailed the forms, and followed up with the states on all applications until registration confirmation was received from each state.
- Established registered agents (when necessary) in states where the organization did not have an actual physical presence.
- Coordinated with the auditors to have the audit of the organization completed in time to meet state renewal filing deadlines. (Most states require submission of audited financial statements as part of their renewal process.)

### The Legacy Group Impact

With the help of The Legacy Group, the organization was able to focus on their program mission and fundraising strategic plan. When the time came to roll out their initiatives, all state registrations were in place.

Client reference available upon request