

FEDERATION OF TEXAS A&M UNIVERSITY MOTHERS' CLUBS
REQUIRED INFORMATION FOR IRS GROUP EXEMPTION
2018-2019

Due Date: February 1, 2019

CLUB NAME: _____

CLUB EMPLOYEE IDENTIFICATION NUMBER (EIN): ____ - _____

Please answer the following questions by circling your answer or completing the blank:

- | | | | |
|-----|-----|----|--|
| 1. | YES | NO | Our club Fiscal Year is June 1-May 31 .
If NO , what is it _____ |
| 2. | YES | NO | Our Bylaws remain the same as last year. <i>If your answer is NO, you must enclose a copy of any changes made to your Bylaws.</i> |
| 3. | YES | NO | Our Club has paid our dues for 2018-2019 to the Federation Treasurer. |
| 4. | YES | NO | Our Club has filed the appropriate Form 990 with the Internal Revenue Service. |
| 5. | YES | NO | Does your club prepare an annual Budget and have it approved by your Board and then shared with or approved by your club members? |
| 6. | YES | NO | Does your club share a Treasurer's Report at each meeting with your club members? |
| 7. | YES | NO | Does your club have the financial records audited at the end of the fiscal year? |
| 8. | YES | NO | Does your club award scholarships to only club members' students? |
| 9. | YES | NO | Does your club require a mom's club membership as part of the criteria for the scholarship application? |
| 10. | YES | NO | Does your club publicize in several ways and distribute your scholarship applications across the zip codes that your club represents? |

PLEASE ATTACH THE FOLLOWING TO PAGE 1:

1. Copy of Bylaws – **ONLY IF changed since last year's filing**

***For questions on completing this form please contact
Cathleen Inman
(830) 385-8811
preselect@aggienetwork.com***

**FEDERATION OF TEXAS A&M UNIVERSITY MOTHERS' CLUBS
FEDERATION GROUP EXEMPTION STATEMENT**

Please select one of the following statements by placing a check in the box to the left:

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The _____ Club, a member of the Federation of Texas A&M University Mothers' Clubs, **wishes to continue to be included** in the Federation Group Exemption Letter for the Fiscal Year beginning June 1, 2019 and ending May 31, 2020 and for each year thereafter until the Federation Board is notified otherwise and will follow the rules set by the Federation in accordance with the Internal Revenue Service rules as they relate to Group Exemption requirements.

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The _____ Club is **NOT** in the Federation of Texas A&M University Mothers' Clubs Group Exemption. We file our own required IRS exemption forms each year. The Federation of Texas A&M University Mothers' Clubs Board will be notified of any changes.

Signed: _____, 2018-2019 Club President

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: _____

E-Mail: _____

Club Employee Identification Number (EIN): _____ - _____

Date: _____

ALL clubs must complete and mail **ALL** pages (Page 1 - with attachment if applicable, Page 2, 3 and 4 - checklist) to the President-Elect, postmarked no later than **February 1, 2019**. If you prefer you may scan and email the forms directly to preselect@aggienetwork.com

PLEASE MAIL ALL PAGES OF YOUR COMPLETED FORM T AT THE SAME TIME.

**FEDERATION OF TEXAS A&M UNIVERSITY MOTHERS' CLUBS
STATEMENT OF PURPOSE AND ACTIVITIES**

CLUB NAME: _____ **DATE:** _____

State the purpose for which your Club was formed and give a detailed description of its past, present and proposed future activities. Identify the specific benefits, services, or products the club has provided or will provide the University and its student organizations. If your Club is not fully operational, explain the stage of development its activities have reached and list the remaining goals to be reached. Give the projected date of completion of these plans. (BE SPECIFIC ABOUT THE PURPOSE AND ACTIVITIES OF THE CLUB. DO NOT REPEAT THE PURPOSE AS IT IS STATED IN YOUR BYLAWS.)

List the Club's top 3 (three) sources of financial support in descending order.

List the top 3 (three) ways your Club spends its money in descending order.

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FORM T CHECKLIST
POSTMARKED NO LATER THAN FEBRUARY 1, 2019

CLUB NAME: _____ DATE: _____

The Federation is required by the IRS to keep a file of records for each club that is part of the Group Exemption.

The following pages **MUST** be completed yearly by each Club President and sent to the Federation President-Elect to be maintained in your Club's file.

This page is a **CHECKLIST** for your Club President to complete.

<u>DATE SENT</u> _____	<u>FORM T</u> Page 1	<u>Required information for continuance of IRS group exemption</u> These 10 questions must be answered accordingly. Please attach the following to Page 1:
_____	<u>Attachment 1</u> (ONLY If your Club had a change in Bylaws since filing February 1, 2018)	<u>Copy of your Club's Bylaws</u> – This must comply with the IRS regulations. If you have any questions, please contact the President-Elect or Parliamentarian of the Federation. <u>Your Bylaws must include the following:</u> <ol style="list-style-type: none"> 1. <u>PURPOSE</u> (See Article II of the Federation Bylaws) 2. <u>RESTRICTION CLAUSE</u> (See Article XIV of the Federation Bylaws) 3. <u>DISSOLUTION CLAUSE</u> (See Article XV of the Federation Bylaws) <p>The entire Federation Bylaws may be found in the Federation Directory.</p>
_____	<u>FORM T</u> Page 2	<u>Group Exemption Statement</u> – This must be completed and signed by your Club President. Your EIN number must be in the proper space.
_____	<u>FORM T</u> Page 3	<u>Statement of your Club's Purpose and Activities</u> – This is a detailed description of the purpose and activities of your Club and must specify sources of income and nature of expenses.

ALL clubs must complete and mail **ALL** pages (Page 1 - with attachment if applicable, Page 2, 3 and 4 - checklist) to the President-Elect, postmarked no later than **February 1, 2019**.

Please retain a copy of **ALL** pages for your Club's records.

PLEASE MAIL ALL COMPLETED PAGES OF YOUR **FORM T** AT THE SAME TIME TO:

Cathleen Inman, President-Elect
Federation of TAMU Mothers' Clubs
PO Box 1723
Blanco, TX 78606
OR email to: preselect@aggienetwork.com