



Step-by-Step Guide Forming a Local Historical Organization in Wisconsin

- 1 - **Adopt By-Laws:** See the sample bylaws at <https://www.wisconsinhistory.org/pdfs/localhist/WHS-4919bylaws.pdf>
- 2 – **Apply for Affiliation:** Application forms are online at <https://www.wisconsinhistory.org/Records/Article/CS4042>
 - To submit your application, contact your Field Services Representative:
 - Rick Bernstein at rick.bernstein@wisconsinhistory.org or 608-264-6583, Southern Region
 - Janet Seymour at janet.seymour@wisconsinhistory.org or 715-836-2250, Northern Region
- 3 – **Incorporate:** Following approval by the Wisconsin Historical Society Board of Curators, in consultation with applicant, Society staff will file Articles of Incorporation with Department of Financial Institutions.

NOTE: Since the Board meets irregularly, you may choose to incorporate before you affiliate with the Society. To incorporate, file DFI Form 102 with the Department of Financial Institutions at <https://www.wdfi.org/resources/indexed/site/corporations/dfi-corp-102.pdf>
- 4 – **Apply for a Federal Employer ID Number (FEIN):** The FEIN is a nine-digit number assigned to corporations, nonprofit organizations, and other entities for tax filing, reporting purposes, and establishing your business tax account.
 - You will use the SS-4 form to apply for the FEIN. This can be done online at www.irs.gov/businesses/small/article/0,,id=102767,00.html
 - Additional resource: Publication 1635, *Understanding Your EIN* at <https://www.irs.gov/pub/irs-pdf/p1635.pdf>
- 5 – **Open a Bank Account and Establish Check Signing Procedures**
 - Resources for opening bank accounts for small non-profit organizations:
 - Non-Profit Financial Center: <https://www.nonprofitaccountingbasics.org/>
 - Basic Guide to Non-Profit Financial Management: <https://managementhelp.org/nonprofitfinances/basics.htm>
- 6 – **File for Federal Tax Exemption:** IRS Package 1023, Application for Recognition for Exemption Under Section 501(c)(3) of the Internal Revenue Code: <https://www.irs.gov/instructions/i1023>
 - Additional Resource: Publication 557, *Tax Exempt Status for Your Organization*: www.irs.gov/publications/p557/
- 7 – **Register as a Charitable Organization** (if necessary): Register through the Wisconsin Department of Safety and Business Services. To fill out Charitable Organization Registration Statement Form 296, go to <https://www.wdfi.org/CharitableOrganizations/forms/dfi-dccs-296.pdf>
- 8 – **Apply For Wisconsin Sales and Use Tax Certificate of Exempt Status**
 - Wisconsin Department of Revenue Form S-103: <https://www.revenue.wi.gov/DORForms/s-103.pdf>

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