

Opt-in for CSTA Group Exemption Status:

All the info can be found here, [Chapter Finance Toolkit](#), but below is a step-by-step checklist:

1. ☐ EIN: [How to Complete an Application for an Employer Identification Number \(EIN\)](#)
2. ☐ OPT-IN: [CSTA Chapter Group Exemption Opt-In Letter](#) (Please complete and share with Chapter Support Team.)
3. ☐ STATE INCORPORATION: The following form is what Cogency Global needs to do their work (we pay for it):
 - [Chapter State Registration Information](#) (Please complete and share with the Chapter Support Team.)
 - In the Chapter Information at the top, it is okay to list one chapter leader's home or work address and to update each year.
 - To add some context on 'Chapter Directors' - "This should only represent elected Chapter Leaders. If the chapter has more than President and Treasurer [i.e. Vice-President, Secretary, etc.] they should be included."
4. ☐ BANK ACCOUNT: [How to Establish a Chapter Bank Account](#)
 - You can try setting this up after you have your EIN, but you may need to wait until the state incorporation comes through.
 - 4a. Once you have the bank account, you can **set up a Stripe account** and which you can later link to the events in Higher Logic: [How to Collect Event Registration Fees](#) (aka Setting up Stripe)
5. ☐ UPDATE CHAPTER BYLAWS: [Participating in CSTA's Group Exemption](#) (If you've updated your bylaws or have bylaws that include this language, please share them with me?)
 - Chapter bylaws need to be updated to include some specific language. If you already have this language in your bylaws, then no need to update.