



UMC Affiliated & Council Chartered Units Bank Account/EIN FAQ & Process

- Question:** Do we need to change our unit bank account now that we are chartered by the council?
Answer: Yes. Bank accounts should be set up using the council's EIN # which will be provided to your Committee Chairman once the initial paperwork to transition to a council charter is completed (see step 1 below) and recharter/membership renewal is posted by the council.
- Question:** How should our new account be named?
Answer: Pack/Troop/Crew Number, Town, State
Lincoln Heritage Council, BSA
- Question:** As a council Chartered Unit, how can we purchase supplies/gear for our unit in a tax-exempt manner?
Answer: As a Council Chartered unit, once your Affiliation Paperwork is complete and recharter/membership renewal is posted, we will provide the tax-exempt information to your Committee Chairman.
- Question:** Are we required to use a specific bank? **Answer:** No.

Obtaining/Using the Council's EIN/Tax ID:

1. To obtain & use the council's EIN and Tax-Exempt status – the following needs completed:
 - A. [Unit Charter Release – Assumption Form](#): Completed by UMC (current Chartered Org) & Council
 - B. [BSA UMC Affiliation Agreement](#): Completed by UMC, Council, and Unit Leadership
 - C. [Annual Registration Agreement – Council Registered Units](#): Completed by Council and Unit
 - D. [New Unit Application](#): Completed by Council Leadership
 - E. Unit must also complete recharter/membership renewal online and council processes the above paperwork and online recharter/renewal.
 - Once above information is complete, the Council will provide the EIN # and Tax-Exempt Information to the Unit Committee Chair via email from our Council's registrar.
2. Call/visit the bank you would like to use to set meeting to create an account using the EIN # provided.
 - Every unit should have 2 signatures on each account.
3. Be sure to inquire about fees and types of accounts available for a non-profit youth group.
4. Protection of the council's not for profit status is critical. The council's EIN/Tax ID must be protected and used for official unit business as authorized.
 - Unit financial summary with statement must be provided to the council on annual basis.
 - Units must implement the guidance provided in the "Steps to Protect Unit Funds" and follow "Fiscal Policies for BSA Units".