

Formation & Tax Exempt Status


Adler & Colvin assists clients with the formation of new charities and other nonprofit organizations. Our primary focus is to create sustainable entities that achieve our clients' visions.

AREAS OF FOCUS

- › Exploring with clients the different options available to them and helping them determine whether a business or nonprofit structure would best enable them to achieve their goals.
- › Assessing whether a new organization may qualify as a 501(c)(3) charity or another type of tax-exempt organization, and advising on compliance issues associated with each type of tax-exempt organization.
- › Making decisions regarding public charity and private foundation status and understanding the technical distinctions between the two.
- › Governance structures and options available under corporate law, and draft governing documents accordingly.
- › Developing budgets and business plans.
- › Preparing and submitting for approval the necessary exemption applications to governmental agencies, such as the IRS and the California Franchise Tax Board, and assist with accelerating and completing the review process.
- › Managing the ongoing operation of a new tax-exempt entity, including providing an overview of compliance issues and forms for use in corporate governance.

CONTACT INFORMATION

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