

State and Local Filings

Overview for State Coalitions

As affiliates of the national Jump\$Start Coalition for Personal Financial Literacy, state coalitions are required to submit their bylaws, articles of incorporation/organization (as mandated by their state law), and a signed affiliation agreement. Copies of these documents are retained at the national office; but state coalitions must also retain copies of these documents for their own records. (See retention policy for guidance.) State coalitions must also supply the national office with any amendments to these documents.

Most states require nonprofit corporations like our state coalitions to file one or more reports or registrations every year.

- The four different kinds of filing requirements are: 1) corporate filings; 2) financial reports; 3) fundraising registrations; and 4) state tax-exempt filings.
- The filing is submitted to whichever state agency maintains corporate records of nonprofit corporations that are registered in the state.
- Keep in mind that requirements vary from one state to another, so it is incumbent upon the state coalition's leadership to understand their own state's rules.
- Failure to file could result in the state coalition losing its "good standing" in the state. Losing "good standing" in the state could affect the coalition's ability to make major changes such as amend its articles of incorporation, change its name, change its registered agent, or merge/dissolve.

Every Jump\$Start state coalition must be up to date on their annual state filings, as well as their federal tax filing (Form 990).

State Coalitions' Role

- Many state coalition bylaws assign responsibility for tax filings to the Treasurer and responsibility for document retention to the Secretary. Check your own bylaws to be sure and assign these duties if the bylaws are silent or unclear.
- For state coalitions with administrative staff, filings would generally be executed by staff, but overseen by the officer with designated responsibility.

In compiling these guidelines, Jump\$Start relied on information from the [National Council of Nonprofits](#). Harbor Compliance offers a list of [filing authorities](#) in each state and Hurwit & Associates offers [state-by-state guidance on registration and compliance](#). (Jump\$Start is not affiliated with any of these organizations.)