

Schedule E
(Form CHAR410,
CHAR410-A or CHAR410-R)

Must be attached to form CHAR410,
CHAR410-A or CHAR410-R

Request for Registration Exemption for Charitable Organizations

New York State Department of Law (Office of the Attorney General)
Charities Bureau - Registration Section
120 Broadway
New York, NY 10271
www.oag.state.ny.us/bureaus/charities/about.html

**Open to Public
Inspection**

Full Name of Organization	Fed. employer ID no. (EIN)	NY State registration no.
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*If your organization is not claiming exemption from registration under either or both Article 7-A or the EPTL, do **not** complete Schedule E and do **not** submit a blank Schedule E. An exemption request that is not accompanied by **all** required documentation as listed below and in CHAR410, CHAR410-A or CHAR410-R Part D (Attachments) will not be considered. Do **not** request exemptions that cannot be supported by the documentation required. An exemption request has **not** been granted unless you receive a letter confirming your organization's exemption.*

Indicate whether you are claiming an exemption from the EPTL or Article 7-A or both. Complete the corresponding exemption request questions.

EPTL ⇔ Complete Part I (EPTL), skip Part II (Article 7-A).

Article 7-A ⇔ Complete Part II (Article 7-A), skip Part I (EPTL).

Both EPTL and Article 7-A ⇔ Complete Part I (EPTL) **and** Part II (Article 7-A). If you complete one but not both exemption request parts, your organization may be exempted under only one law and registered under the other law, in which case your organization would be required to file annually with the Charities Bureau.

Part I: EPTL Exemption Request

Registration exemption claim (check all that apply)	Required additional documentation (in addition to attachments listed in CHAR410, CHAR410-A or CHAR410-R Part D)
<input type="checkbox"/> 1. Organization is not charitable	None
<input type="checkbox"/> 2. Organization does not conduct activity in NY State	If your organization lists a New York address in either question 3 (Mailing address) or question 4 (Principal NYS address) of CHAR410, CHAR410-A or CHAR410-R Part A, attach a detailed explanation of why the organization has a New York address but claims not to conduct activity in NY State
<input type="checkbox"/> 3. Organization is a government agency or is controlled by a government agency	For organizations controlled by a government agency, attach a description of the relationship between your organization and the government agency and either: <ul style="list-style-type: none"> a copy of the letter from the Charities Bureau confirming the government agency exemption of that other organization, or a copy of the government agency's charter and, if applicable, IRS tax exemption determination letter
<input type="checkbox"/> 4. Organization reports annually to either the U.S. Congress or the NY State Legislature	Attach a copy of either: <ul style="list-style-type: none"> the most recent annual report filed with the U.S. Congress or the NY State Legislature, as the case may be; or a letter from such legislative body confirming that your organization reports annually to it
<input type="checkbox"/> 5. Organization is incorporated under the religious corporations law or is another type of organization with a religious purpose or is operated, supervised or controlled by or in connection with a religious organization	<ul style="list-style-type: none"> Attach a copy of listing in official denominational directory (for example, "Blue Directory"), if applicable; and For organizations operated, supervised or controlled by or in connection with another organization that is exempt from registration as religious, attach a description of the relationship between your organization and that other organization and either: <ul style="list-style-type: none"> a copy of the letter from the Charities Bureau confirming the religious exemption of that other organization, or a copy of that other organization's certificate of incorporation, by-laws, trust agreement and/or other organizational document and amendments, and, if applicable, IRS tax exemption determination letter
<input type="checkbox"/> 6. Organization is an educational institution, museum or library incorporated under the NY State Education Law or by special act	None
<input type="checkbox"/> 7. Organization is a hospital, skilled nursing facility or diagnostic/treatment center	Attach a copy of your organization's operating certificate from the NY State Department of Health
<input type="checkbox"/> 8. Organization is a membership organization (fraternal, patriotic, social, student, alumni, veterans)	None
<input type="checkbox"/> 9. Organization is a volunteer firefighters or volunteer ambulance service organization	None
<input type="checkbox"/> 10. Organization is a historical society chartered by the Board of Regents of the State University of New York	Attach a copy of the organization's charter from the Board of Regents of the State University of New York
<input type="checkbox"/> 11. Organization is a cemetery corporation subject to the provisions of Article 15 of the NY State Not-For-Profit Corporation Law	None
<input type="checkbox"/> 12. Organization is the NY State parent teachers association ("PTA") or any PTA affiliated with an educational institution subject to the jurisdiction of the NY State Education Department	Attach a copy of both: <ul style="list-style-type: none"> the educational institution's charter from the NY State Education Department; and a description of the relationship between the organization and the educational institution
<input type="checkbox"/> 13. Organization is incorporated under Article 43 of the NY State Insurance Law	None

Part II: Article 7-A Exemption Request

Registration exemption claim (check all that apply)	Required additional documentation (in addition to attachments listed in CHAR410, CHAR410-A or CHAR410-R Part D)
<input type="checkbox"/> 1. Organization does not solicit or receive any contributions from NY State (including residents, foundations, corporations, government agencies, etc.)	None
<input type="checkbox"/> 2. Organization solicits and receives gross contributions from NY State (including residents, foundations, corporations, government agencies, etc.), but organization's gross contributions are less than and will continue to be less than \$25,000 per year and organization does not and will not use the services of a professional fund raiser or fund raising counsel	None
<input type="checkbox"/> 3. Organization receives all or substantially all of its contributions from a single government agency to which it submits annual financial reports similar to those required by Article 7-A and organization's gross contributions from all other NY State sources, including other government agencies, do not and will not exceed \$25,000 per year	Attach a copy of the organization's most recent IRS Form 990, 990-EZ or 990-PF, including Schedule B, filed with the IRS
<input type="checkbox"/> 4. Organization receives an allocation from a federated fund, United Way or incorporated community appeal and organization's gross contributions from all other sources do not and will not exceed \$25,000 per year and organization does not and will not use the services of a professional fund raiser or fund raising counsel	Attach a copy of the organization's most recent IRS Form 990, 990-EZ or 990-PF, including Schedule B, filed with the IRS
<input type="checkbox"/> 5. Organization is incorporated under the religious corporations law or is another type of organization with a religious purpose or is operated, supervised or controlled by or in connection with a religious organization	<ul style="list-style-type: none"> • Attach a copy of listing in official denominational directory (for example, "Blue Directory"), if applicable; and • <u>For organizations operated, supervised or controlled by or in connection with another organization that is exempt from registration as religious</u>, attach a description of the relationship between your organization and that other organization and either: <ul style="list-style-type: none"> - a copy of the letter from the Charities Bureau confirming the religious exemption of that other organization, or - a copy of that other organization's certificate of incorporation, by-laws, trust agreement and/or other organizational document and amendments, and, if applicable, IRS tax exemption determination letter
<input type="checkbox"/> 6. Organization is an educational institution that confines its solicitation to its student body, alumni, faculty and trustees and their families	Attach a copy of the organization's charter from the NY State Department of Education, Board of Regents of the State University of New York or similar government agency
<input type="checkbox"/> 7. Organization is an educational institution or museum that files annual financial reports with the Board of Regents of the State University of New York as required by the NY State Education Law or with an agency having similar jurisdiction in another state	Attach a copy of either: <ul style="list-style-type: none"> • the most recent annual financial report filed with the Board of Regents of the State University of New York or other similar government agency; or • a letter from such government agency confirming that your organization reports annually to it
<input type="checkbox"/> 8. Organization is a library that files annual financial reports as required by the NY State Education Department	Attach a copy of either: <ul style="list-style-type: none"> • the most recent annual financial report filed with the NY State Education Department; or • a letter from the NY State Education Department confirming that your organization reports annually to it
<input type="checkbox"/> 9. Organization is a membership organization (fraternal, patriotic, social or alumni) that confines its solicitation of contributions to its membership	None
<input type="checkbox"/> 10. Organization is a law enforcement support organization that confines its solicitation of contributions to its membership	None
<input type="checkbox"/> 11. Organization is a historical society chartered by the Board of Regents of the State University of New York that confines its solicitation of contributions to its membership	Attach a copy of the organization's charter from the Board of Regents of the State University of New York
<input type="checkbox"/> 12. Organization is the NY State parent teachers association ("PTA") or any PTA affiliated with an educational institution subject to the jurisdiction of the NY State Education Department	Attach a copy of both: <ul style="list-style-type: none"> • the educational institution's charter from the NY State Education Department; and • a description of the relationship between the organization and the educational institution
<input type="checkbox"/> 13. Organization is a chartered local post, camp, chapter or county unit of a bona fide veterans' organization, a bona fide organization of volunteer firefighters, a volunteer ambulance service organization, or a bona fide auxiliary or affiliate of such an organization and organization's fund raising is done by its members without direct or indirect compensation	For veterans' organizations, attach a copy of the organization's charter from a bona fide veterans' organization
<input type="checkbox"/> 14. Organization is a police department, sheriff's department or other governmental law enforcement agency	None
<input type="checkbox"/> 15. Organization is a government agency or is controlled by a government agency	For organizations controlled by a government agency, attach a description of the relationship between your organization and the government agency and either: <ul style="list-style-type: none"> - a copy of the letter from the Charities Bureau confirming the government agency exemption of that other organization, or - a copy of the government agency's charter and, if applicable, IRS tax exemption determination letter