



DIY Guide for Obtaining an EIN

The EIN (Employer Identification Number), also known as a TIN (Taxpayer Identification Number), is essentially a Social Security number for a business. This number is needed to file a tax return, open a bank account, and file an application for tax exemption.

Practice tip: The application for the EIN is called the SS-4 and the EIN letter itself is the CP-575.

To get started, you will need:

- The legal name of the organization
- The physical address of the organization
- An officer or director's name, phone number, and Social Security number (SSN)

Step 1. Access the IRS EIN website. This can be completed by doing an internet search for "IRS EIN" or by going to the [IRS website](#).

Step 2. Select the appropriate type of organization. If you do not see your specific type of organization listed, it is acceptable to choose "Other Non-Profit/Tax-Exempt Organizations."

EIN Assistant

Your Progress:	1. Identify	2. Authenticate	3. Addresses	4. Details	5. EIN Confirmation
What type of legal structure is applying for an EIN? <p>Before applying for an EIN you should have already determined what type of legal structure, business, or type of organization is being established.</p> <p>Choose the type you are applying for. If you don't see your type, select "View Additional Types."</p> <ul style="list-style-type: none"><input type="radio"/> Sole Proprietor Includes individuals who are in business for themselves and household employers.<input type="radio"/> Partnerships Includes partnerships and joint ventures.<input type="radio"/> Corporations Includes S corporations, personal service corporations, real estate investment trusts (REIT), regulated investment conduits (RIC), and settlement funds.<input type="radio"/> Limited Liability Company (LLC) A limited liability company (LLC) is a structure allowed by state statute and is formed by filing articles of organization with the state.<input type="radio"/> Estate An estate is a legal entity created as a result of a person's death.<input type="radio"/> Trusts All types of trusts including conservatorships, custodianships, guardianships, irrevocable trusts, revocable trusts, and receiverships.<input checked="" type="radio"/> View Additional Types, Including Tax-Exempt and Governmental Organizations If none of the above fit what you are establishing, there are several others to choose from.				Help Topics <ul style="list-style-type: none">? What if I do not know what type of legal structure or organization to choose?	

EIN Assistant

Your Progress: **1. Identify** 2. Authenticate 3. Addresses 4. Details 5. EIN Confirmation


Additional Types

Choose the type you are applying for. You can click the underlined terms for a description.

- [Bankruptcy Estate \(Individual\)](#)
- [Block/Tenant Association](#)
- [Church](#)
- [Church-Controlled Organization](#)
- [Community or Volunteer Group](#)
- [Employer/Fiscal Agent \(under IRC Sec 3504\)](#)
- [Employer Plan \(401K, Money Purchase Plan, etc.\)](#)
- [Farmers' Cooperative](#)
- [Government, Federal/Military](#)
- [Government, Indian Tribal Governments](#)
- [Government, State/Local](#)
- [Homeowners/Condo Association](#)
- [Household Employer](#)
- [IRA](#)
- [Memorial or Scholarship Fund](#)
- [Plan Administrator](#)
- [Political Organization](#)
- [PTA/PTO or School Organization](#)
- [REMIC](#)
- [Social or Savings Club](#)
- [Sports Teams \(community\)](#)
- [Withholding Agent](#)
- [Other Non-Profit/Tax-Exempt Organizations](#)

Help Topics

[? What if I still do not know what type of structure or organization to choose?](#)



Step 3. Provide responsible party information. Type in the name of the officer providing the SSN and choose the option that most closely reflects the relationship to the organization. The SSN is a one-time instance. This is required because it allows the IRS to confirm an actual person is applying for the EIN.

Step 4. Type in the organization's basic information. You must provide a physical address — a P.O. box will not suffice — showing the organization will be operating within the United States.

Step 5. Type in the organization name and formation date. Enter identifying information of the organization.

EIN Assistant

Your Progress: 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details 5. EIN Confirmation

Tell us about the PTA/PTO or School Organization.

***Required fields**
 The only punctuation and special characters allowed are hyphen (-) and ampersand (&).
 The trade name may not contain an ending such as 'LLC', 'LC', 'PLLC', 'PA', 'Corp', or 'Inc'.

Legal name of PTA/PTO or School Organization *

[Trade name/Doing business as](#)
 (only if different from legal name)

County where PTA/PTO or School Organization is located * ORANGE

State/Territory where PTA/PTO or School Organization is located * FLORIDA (FL)

[Date business started or acquired](#) * Select Month Year

Before continuing, please review the information above for typographical errors.

Continue >>

Practice tip: The start date is the month and year the organizing documents were filed or signed, such as, your Articles of Incorporation approval date.

Step 6. Continue moving through the form answering questions. There is a short series of questions about various business practices. Answer the questions honestly. They are not designed to trick anyone.

Step 7. Choose the type of nonprofit. The simplest thing to do is choose “Other” and in as few words as possible indicate the type of organization (e.g., Animal Rescue, Fire Safety).

EIN Assistant

Your Progress: 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details 5. EIN Confirmation

You have chosen Other.

Please choose **one** of the following that best describes your primary business activity:

- Consulting
- Manufacturing
- Organization (such as religious, environmental, social or civic, athletic, etc.)
- Rental
- Repair
- Sell goods
- Service
- Other – please specify your primary business activity: School Support Organizati

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Step 8. Choose the delivery type. If you elect to receive the form electronically, you will be able to download a copy immediately when the application is submitted and approved.



Step 9. Save the document. Be sure to save the actual CP-575 and not the web page itself. This is very important, as the IRS does not reissue the original CP-575. It is vital to click the link to download the EIN letter. In our experience, it is best to right click and “print to a PDF,” as saving the document may save the link rather than the document itself.

The screenshot shows the IRS.gov EIN Assistant interface. At the top, the IRS logo and ".gov" are visible. A navigation bar indicates the user's progress through five steps: 1. Identity (checked), 2. Authenticate (checked), 3. Addresses (checked), 4. Details (checked), and 5. EIN Confirmation (active). The main content area displays a congratulatory message: "Congratulations! Your EIN has been successfully assigned." Below this, a light green box shows the assigned EIN as "00-0000000" and the legal name as "Funds for Fun". An "IMPORTANT:" section follows, advising the user to save and print the page and the confirmation letter below for permanent records. A red arrow points to a button labeled "CLICK HERE for Your EIN Confirmation Letter" with a document icon. To the right of the button is a link: "Help with saving and printing your letter". At the bottom of the main content area, there is a "Continue >>" button. On the right side of the page, there is a "Help Topics" section with two links: "What if I do not have access to a printer at this time?" and "Can I access this letter at a later date?".

Congratulations! You have obtained an EIN. Now you can go to your bank with the CP-575 and your approved Articles of Incorporation and open a bank account!



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