
UM Group Ruling Quick Guide

A product of GCFA's
Legal Services
Department



FINANCE & ADMINISTRATION

General Council on Finance and Administration

THE UNITED METHODIST CHURCH

UM GROUP RULING QUICK GUIDE

APPLYING FOR A LETTER

- 1. Enter your organization’s **Employer Identification Number (EIN)**, then click the **Submit** button.

Employer Identification Number (EIN)

Please enter your organization's nine digit EIN:

Submit

- 2. Select the type of organization that you need the EIN letter for from the following options. Each option will display a unique search criteria that you need to provide.

- a. **Local Church** – enter the church name and location to find the church

Select one:

Local Church Annual Conference District Other

Church Name:

City:

State:

Find Church

- b. **Annual Conference** – select your conference from the dropdown box

Select one:

Local Church Annual Conference District Other

Select Conference:

Select Conference

Select Conference

ALABAMA-WEST FLORIDA

ALASKA

ARKANSAS

BALTIMORE-WASHINGTON

c. **District** – select your conference, then your district from the dropdown boxes

The screenshot shows a form with a radio button group at the top labeled "Select one:" containing four options: "Local Church", "Annual Conference", "District" (which is selected), and "Other". Below this is a dropdown menu labeled "Select Conference:" with "ALABAMA-WEST FLORIDA" selected. Underneath is another dropdown menu labeled "Select District:" with a list of options: "Select District", "Select District", "BAYPINES" (highlighted in blue), "DEMOPOLIS", and "DOTHAN".

d. **Other** – Fill out the form to contact GCFA’s Legal Department for further instructions

The screenshot shows a form for contacting GCFA's Legal Department. At the top, there is a radio button group labeled "Select one:" with four options: "Local Church", "Annual Conference", "District", and "Other" (which is selected). Below this is a text box containing the instruction: "For other organizations, please enter the information below and click Send. You will be contacted by GCFA Legal Services for further instructions." The form contains several input fields: "Organization Name:", "Organization Address:", "Organization City:", "Organization State:" (with a "Select State" dropdown), "Organization Zip Code:", "Contact Name:", "Contact Title In Organization:", "Contact Email Address:", "Confirm Email Address:", and "Contact Phone Number:". At the bottom, there is a "Comments:" label above a large text area, and a red "Send" button.

3. After choosing your option, a form, auto-populated with the organization's name and address information for your organization, opens.

DATE: <u>11/24/2014</u>
CHURCH/ORGANIZATION NAME: <u>BALTIMORE-WASHINGTON CONFERENCE</u>
ADDRESS: <u>11711 E MARKET PL</u> _____
CITY: <u>FULTON</u>
STATE: <input type="text" value="Maryland"/>
ZIP: <u>20759-2594</u>
EMPLOYER IDENTIFICATION NUMBER (EIN): <u>00-0000000</u>

4. At the bottom of the form, enter the following information:

CHARTER/INCORPORATION DATE: / /

CONTACT PERSON: _____

CONTACT JOB TITLE: _____

CONTACT PHONE NUMBER: _____

CONTACT EMAIL: _____

Note: Both phone number and email are not required, entering an email allows you to email the letter to the address entered.

Note: If available and unpopulated, add the Charter/Incorporation Date, but it is not required.

5. If any of the auto-populated information is incorrect and needs to be changed or updated, enter in the **Comments** text box and click the **Submit** button.

Submit Comments:

If the portion of the application that was automatically completed is incorrect, or if you have other comments, please enter them in the Comment Box below. Submitting a comment suspends the Group Ruling application process. If you submit a comment, GCFA's Legal Services Department will contact you.

Submit

Home

6. Select the identity certification checkbox. Only mark this checkbox if you are this person and have the authority to request this legal document. Click the **Submit** button.

By checking the box below, I certify that to the best of my knowledge and belief, the above information is true, correct, and complete; that I am a duly authorized officer of the organization named above; and that the organization named above hereby authorizes the General Council on Finance and Administration to include the organization in The United Methodist Church Group Tax Exemption Ruling.

CHECK HERE. (Required)

[Note: If the requesting organization is a local church, a pastor of that local church is authorized make this certification.]

7. The letter will automatically generate with the following information:

January 09, 2015

BALTIMORE-WASHINGTON CONFERENCE
11711 E MARKET PL
FULTON MD 20759-2594

Re: Certification of Inclusion in The United Methodist Church Group Tax Exemption Ruling

Affiliated Organization: BALTIMORE-WASHINGTON CONFERENCE

Affiliated Organization's Employer Identification Number (EIN): **00-0000000**

8. You have the option of saving the generated letter from the website to your computer.

Note: If you entered an email address, go to step 9.

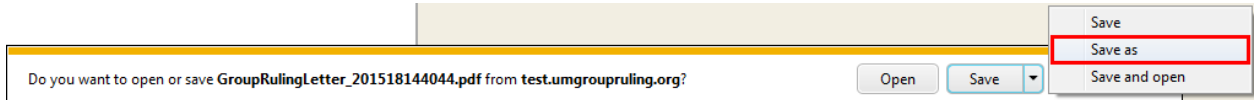


Internet Explorer users, do the following to save the document:

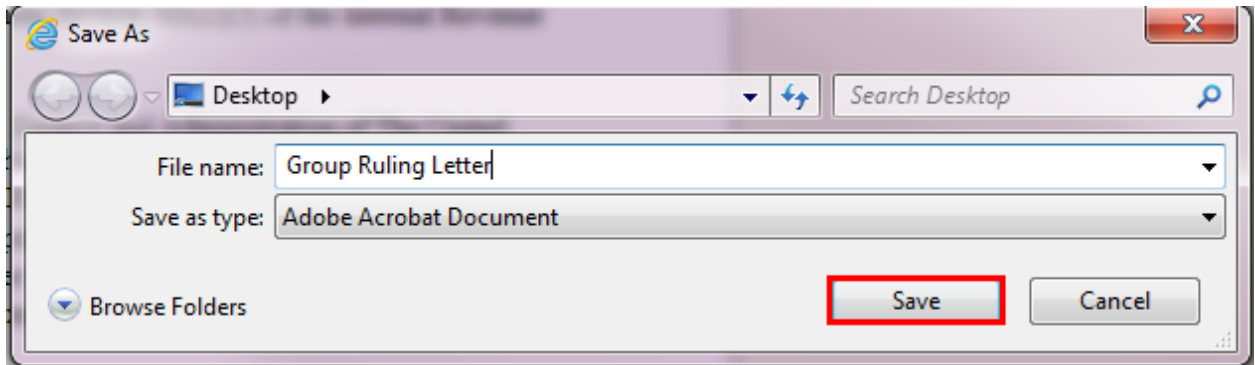
- a. Click the **Save** button at the top of the page.



- b. When the panel opens at the bottom of the page, click arrow on the Save button to open the menu. Click **Save As**.



- c. When the **Save As** window opens, name the document then select where on your computer that you want to save the document, then click the **Save** button.



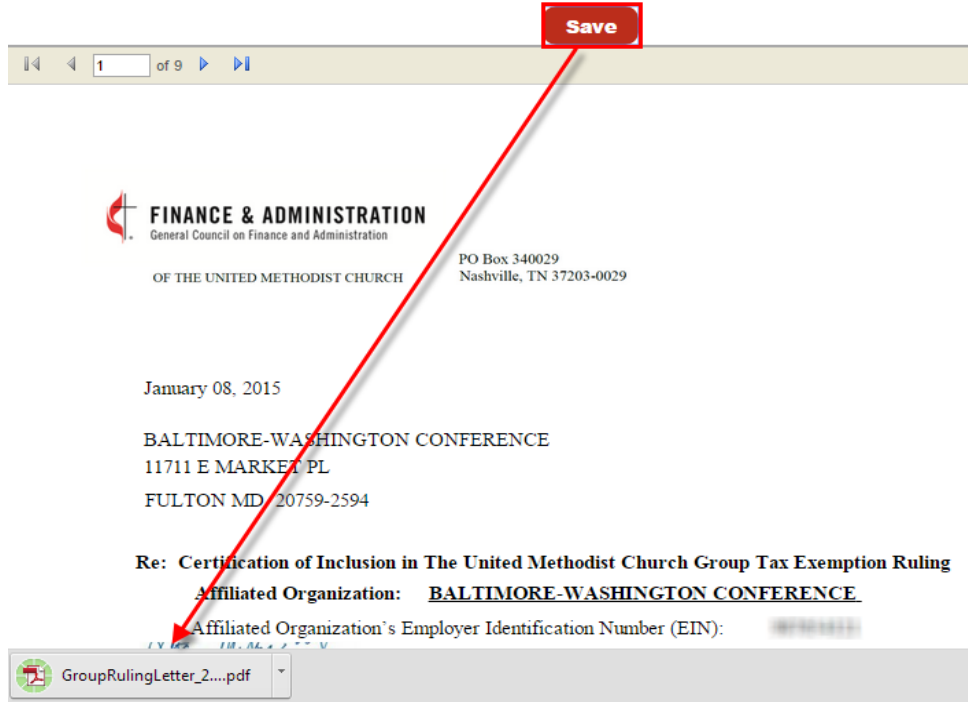
- d. When the download is completed, click the **Open** button to review the downloaded document.



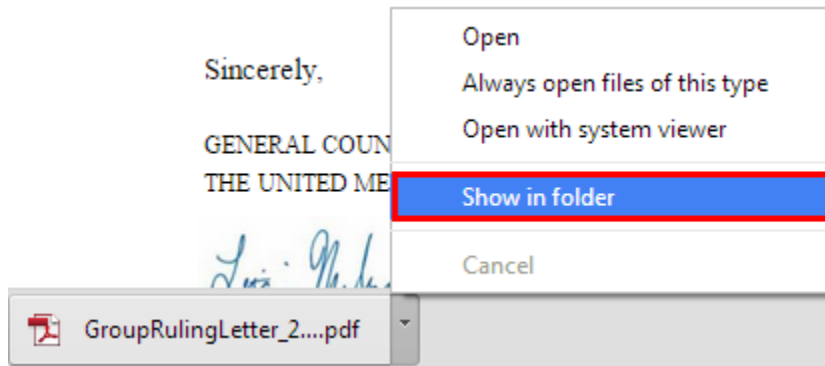


Google Chrome users, do the following to save the document:

- a. Click the **Save** button to automatically save the document to your default download folder.



- b. To open the document, click the download indicator and the document will open in another window. To see the default folder where the letter is currently located, click the **Show in Folder** menu item.

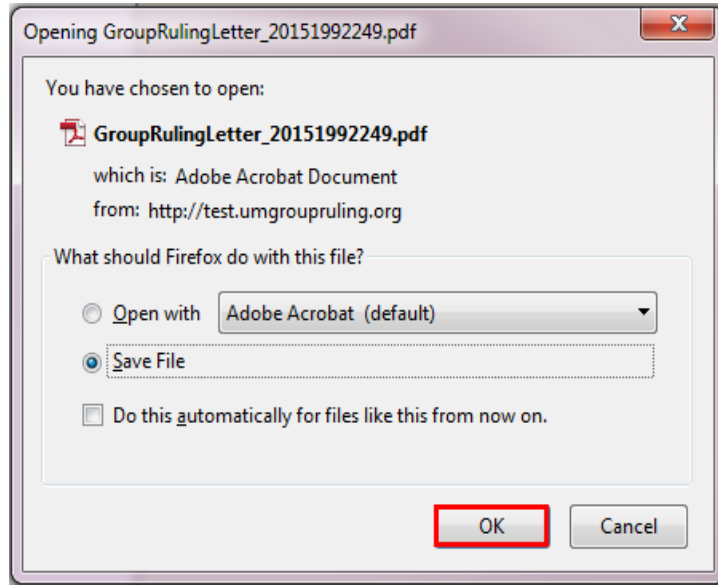


Firefox users, do the following to save the document:

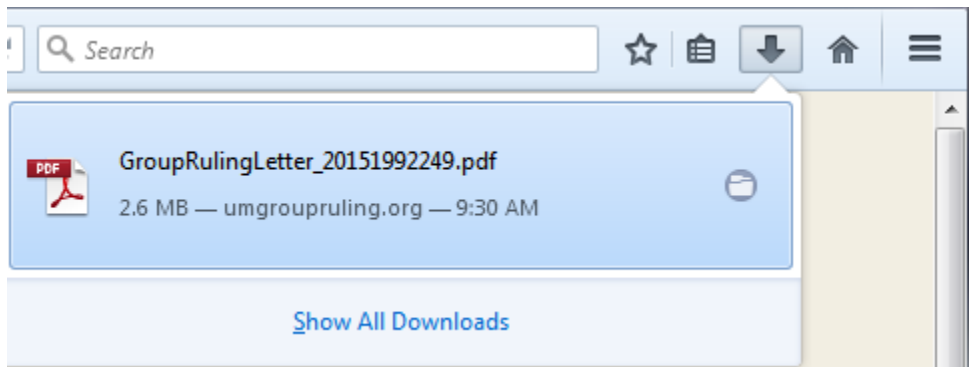
- a. In Firefox, click the **Save** button.



- b. When the window opens, select the **Save File** radial button, then click **Ok**.



- c. The document's download confirmation will appear in the upper right hand corner of the screen.
- d. Click the folder icon to open the folder holding the document.



- 9. You can email the letter to the email address entered previously, save the letter as a PDF to your computer.



- 10. When emailing the letter, you will receive the following from GCFA Legal Services with the letter attached as a PDF.

GCFA Legal Services [New Communication From GCFA Legal Services](#)