



irwinlawfirm.com

Bradford Place
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(918) 392-1900 *phone*
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CLIENT NON-PROFIT ENTITY DATA SHEET

DATE _____ REFERRED BY _____

NAME _____ SS# _____

HOME ADDRESS _____ CITY _____

STATE _____ ZIP _____ COUNTY _____

HOME PHONE (____) _____ CELL PHONE (____) _____

EMAIL #1 _____ EMAIL #2 _____

NONPROFIT NAME _____

ADDRESS _____ CITY _____

STATE _____ ZIP _____ COUNTY _____

NONPROFIT PHONE (____) _____ NONPROFIT EMAIL _____

ORGANIZER _____ PHONE _____

ORGANIZER _____ PHONE _____

ORGANIZER _____ PHONE _____

ORGANIZER _____ PHONE _____

UNITED STATES CITIZEN: YOU: [] YES [] NO; SPOUSE: [] YES [] NO

SERVICES DESIRED: [] NON PROFIT ORGANIZATION

OTHER _____

CB _____ ATY _____

I. ENTITY NAME: _____

II. TRADE NAME, IF DIFFERENT: _____

III. MISSION STATEMENT/PURPOSE

IV. REGISTERED AGENT AND OFFICE:

(Must be a director or an attorney of the Oklahoma Bar Association - office address must be same as registered office and must include street address and city or county.)

NAME

ADDRESS

V. ADDRESS AND PHONE NUMBER OF PRINCIPAL BUSINESS OFFICE:

PHONE () _____

VI. INITIAL BOARD OF DIRECTORS:

| | NAME | ADDRESS | Phone Number |
|----|-------|---------|--------------|
| 1. | _____ | _____ | _____ |
| 2. | _____ | _____ | _____ |
| 3. | _____ | _____ | _____ |
| 4. | _____ | _____ | _____ |
| 5. | _____ | _____ | _____ |
| 6. | _____ | _____ | _____ |
| 7. | _____ | _____ | _____ |

(USE BACK OF PAGE FOR ADDITIONAL NAMES OF DIRECTORS)

VII. INITIAL OFFICERS: AUTHORIZED TO SIGN CHECKS & NOTES

| | | | |
|----------------|-------|---------|--------|
| PRESIDENT | _____ | [] YES | [] NO |
| VICE PRESIDENT | _____ | [] YES | [] NO |
| SECRETARY | _____ | [] YES | [] NO |
| TREASURER | _____ | [] YES | [] NO |
| OTHER | _____ | [] YES | [] NO |

VIII. FISCAL YEAR: _____

IX. ANNUAL MEETING: _____

X. FEDERAL ID#: _____

IF NONE, THEN:

A. DATE ENTITY STARTED _____

B. CLOSING MONTH OF ACCOUNTING YEAR _____

C. FIRST DATE WAGES PAID _____

D. HIGHEST NUMBER OF EMPLOYEES EXPECTED IN NEXT TWELVE MONTHS

NONAGRICULTURAL _____

AGRICULTURAL _____

HOUSEHOLD _____

E. PRINCIPAL ACTIVITY _____

F. HAVE YOU EVER APPLIED FOR AN EIN (TAX I.D. NUMBER) ON THIS OR ANY OTHER ENTITY?

(1) _____
APPLICANT'S NAME TRADE NAME

DATE WHEN FILED FOR CITY/STATE

PREVIOUS EIN

(2) _____
APPLICANT'S NAME TRADE NAME

DATE WHEN FILED FOR CITY/STATE

PREVIOUS EIN

XI. BANK: _____

DO YOU NOW HAVE OR DO YOU PLAN TO HAVE:

XII. QUALIFIED RETIREMENT PLAN [] YES [] NO

XIII. MEDICAL REIMBURSEMENT PLAN [] YES [] NO

XIV. GROUP MEDICAL CARE PLAN [] YES [] NO

XV. GROUP LIFE INSURANCE PLAN [] YES [] NO

XVI. OPTIONAL PROVISIONS IN ARTICLES OR BY-LAWS:

XVII. EMPLOYMENT CONTRACT:

A. EMPLOYEE'S NAME _____

B. EMPLOYEE'S PROFESSION _____

C. OFFICE HELD _____

D. DATE EMPLOYMENT BEGAN _____

E. COMPENSATION \$ _____ mo/yr

F. TERMINATION NOTICE PERIOD _____

G. EXPENSES TO BE PAID BY CORP _____

H. DURATION OF RESTRICTIVE COVENANT _____

I. ENTERTAINMENT ALLOWANCE _____

J. ANNUAL VACATION _____ days/weeks

K. MILEAGE REIMBURSEMENT RATE _____

XVIII. COMMENTS: _____



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R. THOMAS IRWIN

Attorney at Law

Thom is the founder of **Irwin Law Firm, P.C.**, located in Tulsa, Oklahoma, specializing in the areas of Estate Planning, Charitable Gift Planning, Business Planning and Tax. He assists clients by helping them avoid probate, plan for incompetency and disability, reduce estate, gift and other taxes, as well as plan for the proper distribution of assets to the family or other beneficiaries. He uses trusts extensively, including Revocable Living Trusts, Charitable Remainder Trusts, Charitable Lead Trusts, Irrevocable Life Insurance Trusts and Children's Trusts.

Thom also assists clients with their Business Planning, including Corporations, Limited Liability Companies, Partnerships and Non-Profit entities, as well as preparing Buy-Sell Agreements, Employment Agreements and other business-related documents.

Presently an adjunct professor teaching Estate Planning at **Northeastern State University**, Broken Arrow, Oklahoma, Thom believes in education based planning, with the goal being to educate his clients in their planning options and to allow them to make informed decisions.

Upon graduation from Oral Roberts University Law School in 1982, Thom worked in the Estate and Planned Giving Department of the Christian Broadcasting Network in Virginia Beach, Virginia, assisting people in the planning of their estates. He taught at the **Regent University School of Law**, formerly full-time and as an adjunct professor, and taught Estate Planning for the Professional Financial Planning program at **Old Dominion University** in Norfolk, Virginia.

Thom conducts seminars for churches, charitable organizations, business owners, professionals and others in the areas of Estate Planning, Planned Giving and Business Planning.