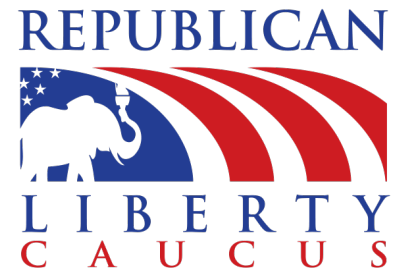


Republican Liberty Caucus

State Charter Manual





State Charter Manual

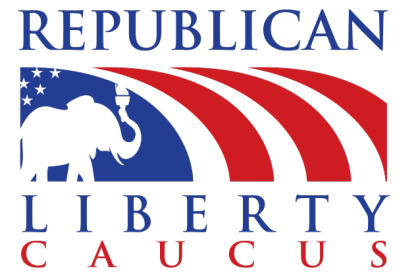
Purpose

The purpose of this guide is to assist interested parties in the creation of a Republican Liberty Caucus State Charter in their respective state or region.

This guide contains basic information, along with advice and best practices from the most talented and committed state leaders, national board members and committee chairs within the organization.

We have collected files, templates, advice and lessons learned that will make your experience building your state charter both fun and exciting. Our hope is that by utilizing the resources within you will avoid some of the errors and pitfalls many of us have made over the years while building our organizations.

Our mutual goal is to build lasting state charters comprised of energetic volunteers who work tirelessly to further the goals of the Republican Liberty Caucus. If you have any questions regarding any of the materials contained in this guide, please don't hesitate to reach out.



Organizational Overview

The Republican Liberty Caucus is a 527 voluntary grassroots membership organization dedicated to working within the Republican Party to advance the principles of individual rights, limited government and free markets. Founded in 1991, it is the oldest continuously-operating organization within the Liberty Republican movement.

Mission

The mission of the Republican Liberty Caucus (RLC) is to return the Republican Party to its ideological roots of limited government, free enterprise and personal liberty and responsibility.

Vision

Members of the Republican Liberty Caucus (RLC) believe in taking a principled stand consistent with the timeless principles of the founding fathers that stands in stark contrast to the existing party establishment.

Members of the RLC are committed to achieving the RLC's mission by doing two things:

1. Working within their local Republican Party organizations to invigorate and revitalize the GOP in their area, and
2. Working to help get candidates who believe in and espouse the principles and positions of the Republican Liberty Caucus elected to office.

Members of the Republican Liberty Caucus conduct themselves both ethically and professionally, and strive to put principle over party, always.



Board

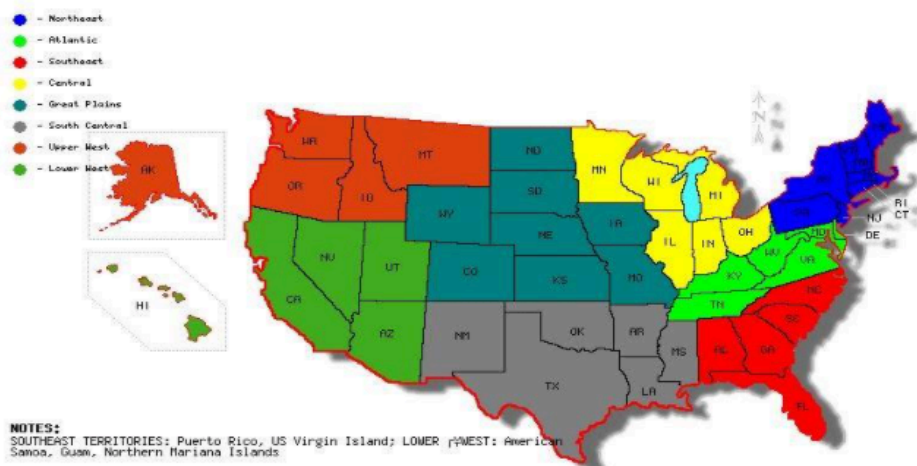
The Republican Liberty Caucus is divided into eight regions each region has a Regional Coordinator that acts as its states' liaison to the National Board. The board is comprised of 15 individuals, the breakdown of which is as follows:

- Officers (4)
- At Large Board Members (3)
- Regional Directors (8)

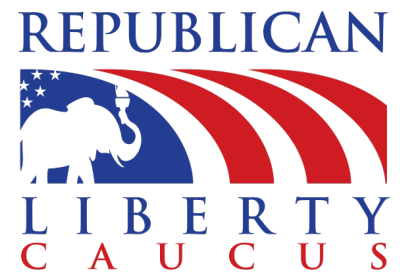
Other Representatives:

Unchartered states may have a designated state coordinator or contact prior to becoming chartered. State coordinators are approved by the National board.

Map & Regional Boundaries:



States are chartered as extensions of the National's 527 organizational filing. The granting of a charter entitles the state to use the Republican Liberty Caucus name in exchange for agreeing to abide by some basic rules and a membership dues sharing arrangement with the National organization. The rules and details of the dues sharing agreement are detailed later in this guide



Charter Creation Process

Step 1 - Become a Dues Paying Member of the RLC

The RLC bylaws require 10 dues paying members in order to create a State Charter. By paying your dues, you complete 10% of this task. Paying dues is also a prerequisite to being named as the Official Coordinator for your state. Many states have 10 dues paying members but still does not have an official affiliate.

Step 2 - Contact or Become the RLC's Official Contact for Your State

The role of the Official Contact person is to passively wait to be contacted by additional RLC members in the state. Official Contacts do not actively work to recruit members or to start an RLC State Charter.

However, the Official Contact may keep a list of potential State Charter Board members, based on people who have contacted her or him in the past. The Official Contact may be aware of other information specific to your state that may help you in the process of creating a State Charter.

Official Contacts are appointed by the national Board of the RLC. Your Regional Director can facilitate the process.

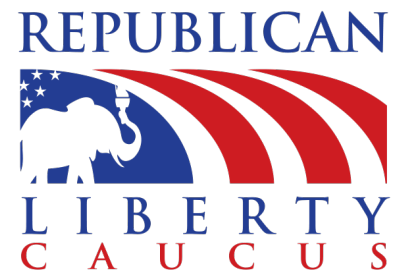
Step 3 - Contact or Become the RLC's Official Coordinator for Your State

The role of the Official Coordinator is to actively find and recruit 10 dues paying RLC members who want to create a State Charter organization. The Official Coordinator replaces and is superior to an Official Contact who may have been appointed previously. Being (or having) an Official Contact is not a pre-requisite for becoming the Official Coordinator.

Official Coordinators are given access to the RLC's membership and contact database. (Official Contacts do not have access.) This information is confidential, and should only be used for the purpose of finding and recruiting potential RLC members.

Step 4 - Recruit or Find 10 Dues-Paying RLC Members Who Want to Create a Charter

The Official Coordinator should work to recruit or find 10 dues paying RLC members who want to create a State Charter organization. Although many states have already reached this threshold you will also have to recruit members who want to help you start the state charter. This is probably the most time consuming step of the process.



Some notes regarding the collection of dues:

Prior to approval of the Charter Application, all dues must be paid to the national RLC. The State Charter organization can only begin collecting dues after it has been recognized by the national Board.

Upon approval of the Charter Application, dues will be shared with the newly created State Charter. For example, regular dues are \$45/person. So the dues total for 10 people is \$450. If those 10 people sign the Charter application, and the application is then approved by the national RLC Board of Directors, \$300 of the \$450 (or 66%) of dues will be given to the newly created state Charter (provided those dues were paid within the last 6 months). The national RLC will keep the other \$150 (or 33%) of the dues.

This dues-sharing procedure is designed to make it easier for the State Coordinator to solicit dues from new RLC members.

After the State Charter is recognized, dues will be shared as described in the national RLC and State Charter bylaws. (Typically, the majority of dues are kept by the organization [state vs. national] that collects them, while \$15 is shared with the organization that did not collect them.)

Step 5 - Review (and Possibly Amend) the Template State Charter Bylaws

All the forms you need, including a template for State Charter Bylaws are included in the "forms" section of this manual.

Significant deviation from the template in some sections may cause the national Board to reject your Charter Application. Please contact your Regional Director if you have any questions or concerns.

State Charter Bylaws will be reviewed by the Chartering Committee periodically after the state is chartered.

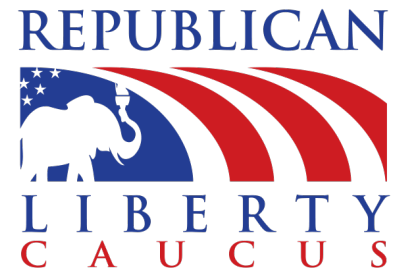
Step 6 - Hold an Organizational Meeting, Elect Officers, Adopt Bylaws

The Official Coordinator should set up and Organizational Meeting. At this meeting, the 10 members should meet (possibly via teleconference), elect officer and adopt (possibly amended) bylaws.

Step 7 - Send the Completed Documents to Your Regional Director

The Charter Application, bylaws, CiviCRM Applications for any members that will need access to the database and the Memorandum of Understanding that outlines the responsibilities of the State Charter and national RLC.

Please send your completed documents to your Regional Director, and possibly also to the national Vice Chairman. After receiving your completed application, the national Board will



decide whether or not to accept the application and recognize your organization as an official State Charter of the RLC.

Step 8 -Set up the legal entity for your State Charter and Open a Bank Account

1. You will need a SSN or EIN to open the bank account. An officer can use their own SSN, but as easy as it is to request an EIN from the IRS (by phone or website), that's the better option. Our EIN Process Guide will get you through each step as you set up your State Charter EIN.

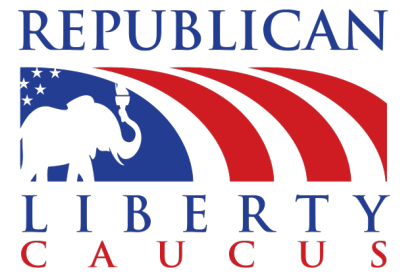
2. Open a bank account.

- A. Think about the longevity of your group and the convenience for future officers. You may not want to pick a small town credit union with only two branches just because they are close to the current Treasurer.
- B. You'll need documentation that you have a "real" organization. Most banks will accept a copy of your organizing documents, i.e. your Bylaws and Rules. Be sure to have them signed by the convention or Charter Secretary.
- C. It is highly recommended to have at least two signatories on the account.
- D. National RLC is an IRC 527 organization. If you need documentation of this, contact the National Treasurer or download a copy from irs.gov (click on the link for Non-Profits and use the search filings tool).

3. Once you have your bank account, check with your state ethics or campaign finance department. Very likely, you'll have to register with them and submit periodic financial reports. For most states, this is the most important agency for compliance.

4. As for federal requirements, you usually don't have any federal reporting requirements for 527s (form 8871 and 8872) as long as you are making required filings with your appropriate state agency. You might have to file the annual informational tax return (Form 990) once your gross receipts average over \$25,000 in any three year period. Very few states reach this level, but it's good to be aware of it. Please consult with the IRS and a tax professional if/when your gross receipts warrant it.

A final word on best practices. National adopted this Rule in the Fall of 2013. Please share with your state officers and consider adding it to your Bylaws and Rules with any appropriate amendments (for example, states may want lower dollar amounts in item 4).



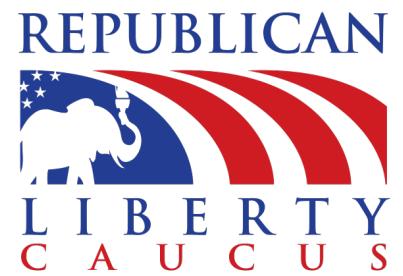
Financial Monitoring and Reporting

The Caucus will keep such permanent books of account and records as shall be sufficient to establish the items of gross receipts and disbursements of the organization.

1. The Caucus' checking account shall have two signatories, but only one party is required to sign all checks. A party may not sign a check for which s/he is a payee.
2. At least quarterly, an Officer or At-Large Board member who does not have check signing authority shall review the bank statements for that quarter.
3. The Treasurer shall comply with any and all reporting requirements as applicable by state and/or federal law.
4. Disbursements not allocated in an approved budget must be authorized as follows: amounts of \$500 and less may be approved by at least two Officers; amounts over \$500 must be approved by a majority of Board and At-Large members.
5. The Treasurer may use available technologies, such as online banking or payment services, to accomplish his/her duties.

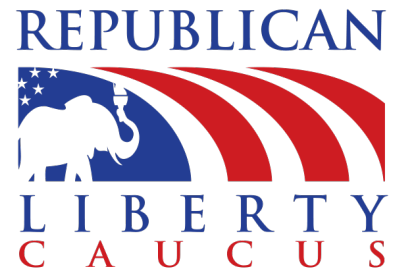
Congratulations and welcome to the Republican Liberty Caucus.

*Please see our other manuals and resources for state affiliates to help you organize and grow.



State Charter Checklist

- ☐ Verify 10 Dues Paying Members
- ☐ Elect Officers for State Charter
- ☐ State Charter Application
- ☐ CiviCRM Applications
- ☐ Memorandum Of Understanding
- ☐ Adopt Bylaws & Rules
- ☐ Register for EIN ([IRS.gov](https://www.irs.gov))
- ☐ Open Bank Account



STATE CHARTER APPLICATION

DATE: _____

STATE: _____

MEMBERS TO QUALIFY FOR STATE AFFILIATION

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

STATE AFFILIATE OFFICERS

Chair: _____

Vice Chair: _____

Phone _____

Phone _____

Email _____

Email _____

Secretary: _____

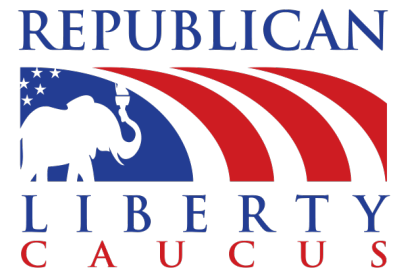
Treasurer: _____

Phone _____

Phone _____

Email _____

Email _____



PLEASE ANSWER THE FOLLOWING QUESTIONS:

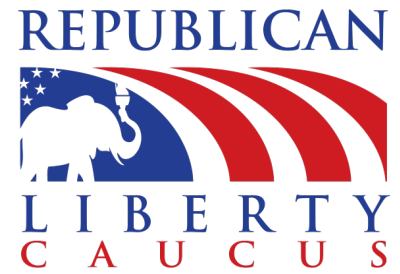
What will your chapter membership and/or dues requirements be?

Why do you want to start a Republican Liberty Caucus chapter and what do you hope to accomplish?

What type of activities does your chapter plan on pursuing?

What are your plans for funding your activities?

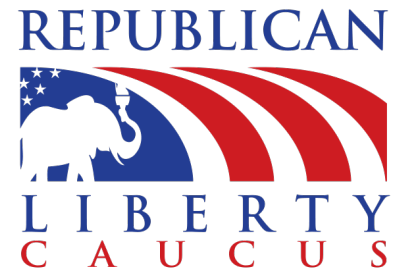
What is your member retention plan?



PLEASE ACKNOWLEDGE YOUR AGREEMENT BY CHECKING
OFF ON THE FOLLOWING STATEMENTS:

- ☐ Our chapter will actively seek to participate in national committee and subcommittee efforts by promoting any opportunities the national committee procures regional, state, and other subchapter members from.
- ☐ We are aware that from time-to-time the national State Charter Committee may review our chapter Bylaws to ensure that they are in compliance with Republican Liberty Caucus national's mission and principles.
- ☐ We will develop a chapter website and are aware that at least the National Secretary will have ultimate administrative discretion over the chapter social media resources.
- ☐ We have reviewed and understand the responsibilities of each member of the national board so that the chapter is aware of who to reach out to with specific concerns and questions.
- ☐ Our chapter is cognizant of the issues the Republican Liberty Caucus takes an explicit position on as well as those where it encourages dialog but does not hold a specific posture on.
- ☐ Our chapter's members will be made aware of the importance of attending the biennial Republican Liberty Caucus National Convention.

****Your application will be reviewed by our State Charter Committee. The board may request additional information before forwarding your application to the RLC National Committee for discussion and possible approval.**



CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT

Upon access to the Republican Liberty Caucus' database through CiviCRM I agree:

- ☐ I agree that any names, phone numbers, emails, addresses or any other proprietary information that I am privy to due to my access to CiviCRM, remain the property of the Republican Liberty Caucus and I shall not transmit this information by any means to any third party.
- ☐ I agree to secure my username and password against all unauthorized use and will further ensure that no person aside from myself will access CiviCRM using my unique access credentials.
- ☐ I agree that matters between the Republican Liberty Caucus and any other party that I may be privy to due to my use of CiviCRM shall not be discussed with third parties or disseminated by any means.
- ☐ I agree that violating the terms of this agreement will result in the termination of my access to CiviCRM and could result in further legal actions.

First: _____ Last: _____

Email: _____ Phone: _____

State or Local Charter: _____

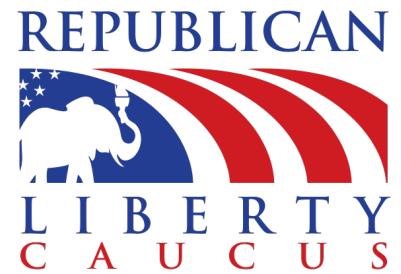
Role in State or Local Charter: _____

Briefly explain what you plan on doing with the data*

By providing my signature below, I agree to the Non-Disclosure Agreement outlined above.

Signature

Date



THIS MEMORANDUM OF UNDERSTANDING ("MOU") is entered into on this _____ day of _____, 20____, by and among The Republican Liberty Caucus (RLC) and the Republican Liberty Caucus of _____ ("Charter") and it's local, county and regional subsidiaries.

PURPOSE

The "RLC" and "Charter" have entered into this MOU to establish an action plan, inclusive of strategic goals and timelines, to guide their collaborative efforts and initiatives enumerated herein, with the stated objectives of maintaining and growing a productive organization.

SCOPE

A. Structure of New Charter

This MOU is intended to include each of "Charter's" operating subsidiaries. References herein to "Charter" are intended to include all local, county and regional subsidiaries.

B. Focus Area

- A. Promoting these ideals among Party officials and its various organizations;
- B. Identifying and supporting candidates sympathetic with these ideals;
- C. Promoting Charter and Caucus membership among Party registrants, officials, officeholders and voters.

RESPONSIBILITIES

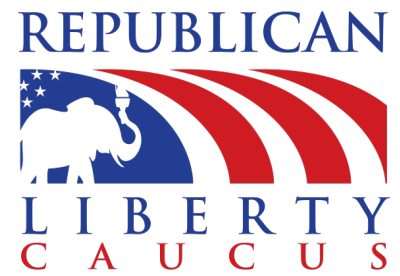
A. Responsibilities of "Charter"

1. Civi CRM Access

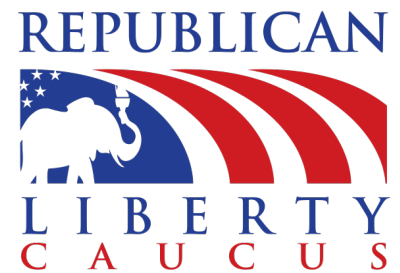
- A. "Charter's" Chairperson and Treasurer must complete CiviCRM training within 60 days of approval of application by the "RLC."
- B. Submit a CiviCRM Application for each member of the "Charter" who will access the "RLC" database.

2. Membership

- A. Establish membership guidelines according to criteria set by "RLC"
- B. Establish "Charter" bank account within 30 days of charter approval according to all federal, state and local governing laws.



- C. Ensure "RLC" dues are paid and documented within CiviCRM
 - D. Reconcile CiviCRM database for the "Charter" quarterly and document that reconciliation in the Treasurer's Report.
3. Charter Board
- A. "Charter" will have at least 3 officers of the board to include Chairperson, Vice-Chairperson & Treasurer.
 - B. Charter will submit to "RLC" basic contact information for the Charter Board to include: address, phone number & email address.
 - C. "Charter" will notify "RLC" of any changes to the Charter Board within 10 days of change.
4. Public Statements
- A. Any and all public statements made by "Charter" or any of its board or representatives must be consistent with the statement of principles of the "RLC."
 - B. Public statements must be made in a manner that does not intentionally or unintentionally harm, disparage or in any way misrepresent the "RLC" or its members.
 - C. Statements made in reference to national issues must be consistent with statement made by the "RLC"
5. Endorsements
- A. Endorsements recommendations for federal candidates must be submitted to "RLC" with ample time for "RLC" boards and committees to properly review candidate.
6. Communication
- A. Submit all events, news or announcements to Executive Director by deadline set by the "RLC" each month for inclusion in newsletters.
 - B. Promote all national "RLC" events with members of "Charter"
 - C. Provide at least "RLC" Secretary with access to all social media accounts of "Charter"



B. Responsibilities of "RLC"

1. Civi CRM Access

- A. Provide CiviCRM passwords and user ID's to "Charter" Chairpersons and Treasurers within 30 days of state charter approval by the "RLC."
- B. Provide CiviCRM training to the State Charter Organizations within 30 days of charter approval.
- C. Provide CiviCRM training and access to additional representatives for "Charter" with approval of the CiviCRM Application.

2. Membership

- A. Establish membership guidelines and criteria "RLC"
- B. Process RLC dues pledged from outside the "Charter" within 30 days of payment.
- C. Reconcile dues payments within CiviCRM at least quarterly and publish this reconciliation in the Treasurer's Report.

3. Public Statements

- A. Any and all public statements made by "RLC" or any of it's board or representatives will be consistent with the statement of principles of the "RLC."
- B. Public statements will be made in a manner that does not intentionally or unintentionally harm, disparage or in any way misrepresent the "Charter" or it's members.

4. Endorsements

- A. "RLC" will take into consideration all recommendations for endorsements of federal candidates within the "Charter" boundaries.
- B. "RLC" will promote through all channels of communications endorsements of candidates for federal office within the "Charter" boundaries upon approval of the "RLC" board.

5. Communication

- A. "RLC" will publish, at least quarterly, a newsletter with relevant national "RLC" news and "Charter" news, events and announcements submitted in a timely manner to "RLC"



- B. "RLC" will publish and promote all "Charter" news, events and announcements on "RLC" website that are submitted in a timely manner.
- C. "RLC" will publish and promote all "Charter" news, events and announcements on "RLC" social media outlets that are submitted in a timely manner.

THE SIGNING OF THIS DOCUMENT COMMITS BOTH THE RLC AND THE "CHARTER" ORGANIZATION TO WORK AS A TEAM TO MOVE THE REPUBLICAN PARTY AND THIS COUNTRY IN THE DIRECTION OF LIMITED GOVERNMENT, RESPECT FOR INDIVIDUAL RIGHTS, AND A RETURN TO FREE MARKET CAPITALISM.

Representative for Charter:

Signature

Date

Representative for RLC:

Signature

Date

Getting an EIN Number



Go To IRS.gov

IRS

Help | News | Language | **Businesses & Nonprofits** | Tax Pros

File | Pay | Refunds | Credits & Deductions | **Forms & Instructions**

Refund Status | Direct Pay | File an Extension | Free File | Get Your Tax Record | View Your Account | Payment Plan | **Employer ID Number (EIN)**

Forms & Instructions

1040 Individual Tax Return | 1040-EZ Tax return for Single and Joint Filers With No Dependents | W-4 Employee's Withholding Allowance Certificate | Search Forms & Instructions

Click on Employer Identification Number

Home > File > **Businesses and Self-Employed** > Small Business and Self-Employed > Employer ID Numbers

Employer ID Numbers

English | Español | 中文(繁體) | 한국어 | Русский | Tiếng Việt

Individuals

International Taxpayers

Businesses and Self-Employed

Small Business and Self-Employed

Employer ID Numbers

Business Taxes

Reporting Information Returns

Self-Employed

Starting a Business

Operating a Business

An Employer Identification Number (EIN) is also known as a Federal Tax Identification Number, and is used to identify a business entity. Generally, businesses need an EIN. You may apply for an EIN in various ways, and now you may [apply online](#). **This is a free service offered by the Internal Revenue Service and you can get your EIN immediately.** You must check with [your state](#) to make sure you need a state number or charter.

- [Do You Need an EIN?](#)
- [Do You Need a **New** EIN?](#)
- [How to Apply for an EIN](#)
- [How Long Will it Take to Get a Number?](#)
- [Lost or Misplaced Your EIN?](#)
- [How EINs are Assigned and Valid EIN Prefixes](#)
- [Canceling an EIN - Closing Your Account](#)
- [Who is a Responsible Party?](#)

Apply for an EIN Online

Check out our Interview-style online EIN application. You will be asked to file a Form SS-4! We ask you the questions and you give us the answers. The application includes embedded help topics and hyperlinked keywords and definitions so separate

Related Topics

- [Taxpayer Identification Numbers TIN](#)
- [Correcting Business Information Where a Nominee Was Used](#)

Publication

- [Publication 1635, Employer Identification Number Understanding Your EIN](#)

Video

- [EIN Video](#)

Select Apply for an EIN Online

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?

Before applying for an EIN you should have already determined what type of legal structure, business, or type of organization is being established.

Choose the type you are applying for. If you don't see your type, select "View Additional Types."

- ☐ Sole Proprietor
Includes individuals who are in business for themselves and household employers.
- ☐ Partnerships
Includes partnerships and joint ventures.
- ☐ Corporations
Includes S corporations, personal service corporations, real estate investment trusts (REIT), regulated investment conduits (RIC), and settlement funds.
- ☐ 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.
- ☐ Estate
An estate is a legal entity created as a result of a person's death.
- ☐ Trusts
All types of trusts including conservatorships, custodianships, guardianships, irrevocable trusts, revocable trusts, and receiverships.
- ☐ 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.

[<< Back](#) [Continue >>](#)

Help Topics

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

Choose
additional
type

Select Continue

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
- ☐ National Guard
- ☐ 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

[<< Back](#) [Continue >>](#)

[IRS Privacy Policy](#)

Help Topics

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

Choose Political
Organization

Select Continue

EIN Assistant

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

Please confirm your selection.

Confirm your selection of **Political Organization** as the type of structure applying for an EIN.

What it is...

- A political organization is a party, committee, association, or fund (including a separate segregated fund described in section 527(f)(3) set up by a section 501(c) organization, or other organization).
- A political organization is organized and operated primarily for the purpose of:
 - Accepting contributions, making contributions, or both
 - Influencing the selection, nomination, election, or appointment of any individual to any public office or office in a political organization.

If you need to change your type of structure, we recommend that you do so **now**, otherwise you will have to start over and re-enter your information. Additional help may be found by reviewing [all types of organizations and structures](#) before making your selection.

<< Change Type

Continue >>

[IRS Privacy Policy](#)

Select Continue

EIN Assistant

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

Why is the Political Organization requesting an EIN?

Choose **one** reason that best describes why you are applying for an EIN.

- ☐ **Started a new business**
Select this option if you are beginning a new business.
- ☐ **Hired employee(s)**
Select this option if you already have a business and need to hire employees.
- ☐ **Banking purposes**
Select this option if the reason for applying for the EIN is strictly to satisfy banking requirements or local law.
- ☐ **Changed type of organization**
Select this option if you are changing the type of organization you currently operate, such as changing from a sole proprietor to a partnership, changing from a partnership to a corporation, etc.
- ☐ **Purchased active business**
Select this option if you are purchasing a business that is already in operation.

Continue >>

Help Topics

- ? [I do not see my reason for applying here. What should I choose?](#)
- ? [What if more than one reason applies to me?](#)

Choose
started a new
business

Select Continue

[IRS Privacy Policy](#)

EIN Assistant

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

Who is the Responsible Party of the Political Organization?

The responsible party can be either an individual OR an existing business.

Please choose one:

- ☐ Individual
☐ Existing business

Choose Individual

<< Back

Continue >>

Select Continue

EIN Assistant

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

You selected individual. Please tell us about the Responsible Party.

* Required fields

Must match IRS records or this application cannot be processed.

The only punctuation and special characters allowed are hyphen (-) and ampersand (&).

First name *

Middle name/initial

Last name *

Suffix (Jr, Sr, etc.)

SSN/ITIN * - -

Choose One: *

- ☐ I am a responsible and duly authorized officer or a board member having knowledge of this organization's affairs.
☐ I am a third party applying for an EIN on behalf of this political organization.

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

<< Back

Continue >>

Select Continue

Choose Here

**The Chair's Information
should go here.**



EIN Assistant

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

Where is the Political Organization physically located?

* Required fields

The only special characters allowed for street and city are - and /.

Note: Must be a U.S. address. Do not enter a P.O. box. [For military addresses click here.](#)

Street *
City *
State/U.S. territory *
ZIP code *
Phone number * - -

Should the mail be directed to a specific person or department within your organization? (This is commonly referred to as the "Care Of" name.)

If yes, please enter name:

Do you have an address **different** from the above where you want your mail to be sent? * ☐ Yes ☒ No

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

[Continue >>](#)

Affiliate Mailing Info Here

Select Continue

EIN Assistant

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

Tell us about the Political Organization.

* Required fields

The only punctuation and special characters allowed are hyphen (-) and ampersand (&).

The legal name may not contain any of the following endings: LLC, PLLC, LC.

The trade name may not contain an ending such as 'LLC', 'LC', 'PLLC', 'PA', 'Corp', or 'Inc'.

Legal name of Political Organization *

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

County where Political Organization is located *

State/Territory where Political Organization is located *

Political Organization start date * Year

Closing month of accounting year *

Will you file [Form 8871 under Sec 527](#)? * ☐ Yes ☐ No

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

[Continue >>](#)

Help Topics

? [What is Form 8871 under Sec 527?](#)

? [How should I input the legal name of the political organization so it meets IRS approved naming conventions?](#)

Affiliate Name and Starting Date Here

**Click YES Here
(You Will Need to Fill
Out Form 8871)**

Select Continue

EIN Assistant

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

Tell us more about the Political Organization.

Do you have, or do you expect to have, any [employees who will receive Forms W-2](#) in the next 12 months? (Forms W-2 require additional filings with the IRS.)

☐ Yes ☐ No

[Continue >>](#)

Choose NO Here

Select Continue

EIN Assistant

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

How would you like to receive your EIN Confirmation Letter?

You have **two** options for receiving your confirmation letter. Please choose one below:

☐ **Receive letter online.** This option requires [Adobe Reader](#).
You will be able to view, print, and save this letter immediately. It will not be mailed to you.

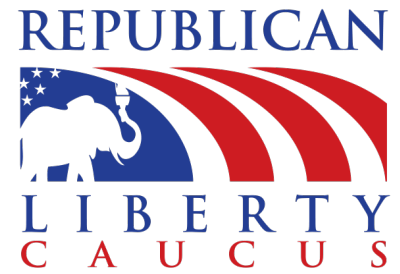
☐ **Receive letter by mail.** The IRS will send the letter to the mailing address you provided - allow up to 4 weeks for delivery.

[Continue >>](#)

Choose Receive Letter Online

Select Continue

Once you select "Continue" your EIN number will appear for download and you are done with the EIN process.



BYLAWS AND RULES OF THE

_____ REPUBLICAN LIBERTY CAUCUS

ARTICLE I: NAME

The name of this organization shall be the Republican Liberty Caucus of _____, hereinafter referred to as the “Charter”. The organization seeks recognition as a Chartered State Chapter of the national Republican Liberty Caucus, hereinafter referred to as “Caucus”. These Bylaws and Rules were adopted in Convention on the ___ day of _____, 20___ and recognition of the Charter was granted by the Caucus Board of Directors.

ARTICLE II: PURPOSE

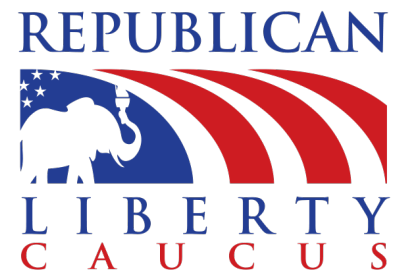
The Charter is a political action organization dedicated to promoting the ideals of the U.S. Constitution, individual rights, limited government and free enterprise within the Republican Party of the United States of America by:

- A. Promoting these ideals among Party officials and its various organizations;
- B. Identifying and supporting candidates sympathetic with these ideals;
- C. Promoting Charter and Caucus membership among Party registrants, officials, officeholders and voters.

ARTICLE III: MEMBERSHIP

Section 1: There shall be three categories of membership: Regular, Associate, and Honorary.

- A. Regular membership shall be limited to individuals who are affiliated with the Republican Party (as determined by the Charter Secretary), who have paid current minimum dues and who support the purposes of the Charter. Regular members



are qualified to serve in any official capacity in the Charter, to act as delegates at any Convention and to enjoy all the privileges extended in these Bylaws.

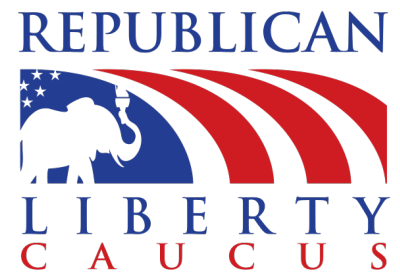
- B. Associate membership shall be open to individual, no matter their political affiliation, who have affirmatively indicated their support for the purposes of the Charter. Associate members shall receive such services and privileges as the Board of Directors may specify.
- C. Honorary membership may be extended to any person designated by the Board of Directors of the Charter. Honorary members shall enjoy such rights, privileges or honors as may be explicitly conferred thereby, either individually or as a group.

Section 2: The Board of Directors shall set the minimum annual dues requirement for Regular membership in the Charter, which shall not exceed fifty dollars. Dues shall be current until the anniversary date of the member's previous dues payment.

Section 3: Dues payments received by the Charter shall be shared with the national Caucus in a fixed amount, not to exceed twenty-five dollars, and disbursed to the Caucus on an agreed schedule, at least quarterly and at least thirty days before a Caucus Convention. Dues payments received by the Caucus shall be shared in the same fixed amount and disbursed to the Charter on the same agreed schedule. The Charter may offer premium membership rates or services, which shall be subject to the same fixed dues sharing amounts as Regular membership. No Regular membership shall be offered for a period in excess of two years.

Section 4: The Charter may waive its portion of dues for any special circumstance or condition approved by the Charter Board, but shall pay the fixed shared amount of dues to the Caucus, either from the exceptional membership dues payment or from general revenues. Either entity may offer periodic payments smaller than the Regular minimum dues, but shall disburse the shared portion before any other allocation of receipts.

Section 5: Contributions received by the Charter from contributors who are not Regular Members shall first be applied toward minimum annual dues and shared in the same fashion as other dues receipts, unless the contributor explicitly declines such membership. All other contributions or donations may be expended as specified by the Charter, but shall not be donated to any electoral campaign.



Section 6: Any membership may be suspended or revoked by a majority vote of the Board of Directors of the Caucus or the applicable Chartered State executive committee for just cause, which may include malfeasance in office, misappropriation of funds, misrepresenting the positions of the Caucus, or conduct which reflects poorly on the Caucus. Any member suspended or revoked by a State charter organization shall have the right to appeal to the National Board of Directors within 90 days, and the National Board of Directors shall render a decision within 90 days of appeal.

ARTICLE IV: BOARD OF DIRECTORS

Section 1: The Board of Directors of the Charter, hereinafter “Board”, shall consist of the at least three Officers of the Charter. There shall be an additional _____ At-Large members. Board members shall be Regular members of the Charter, elected for two-year terms by delegates at a Regular Convention of the Charter. The Chairman may appoint up to three Alternate members of the Board to serve whenever regular members are absent from any meeting or fail to participate in any electronic ballot. Any member of the Board may be removed for just cause, as defined in Article III, Section 6, and vacancies may be filled by a majority vote of all Board members.

A. Members of the Board defined under this article before the first even-numbered year Convention of the Charter as defined in Article VI will serve the lesser of 2 years or until the first Convention as defined in Article VI.

Section 2: The Board shall ensure the effective implementation of these Bylaws, adopt an annual or quarterly budget, provide for effective communications among members, the Charter and the general public, and make arrangements for Regular and Special Conventions of the Charter.

Section 3: The Board shall have full power and authority to govern all the affairs of the Charter between conventions and shall have the sole, ultimate, final and exclusive control over all property, assets, liabilities and other resources of the Charter. The Board shall have the authority to hire, fire, contract and take such legal actions as will effect the will of the Board.



Section 4: The Board shall conduct its meetings in conformance with the most recent edition of Robert's Rules of Order, in the absence of standard or special rules it may adopt that conform with these Bylaws and Rules. The Board may conduct meetings or ballots by telephone, email, or any other means it deems appropriate. Regular meetings of the Board shall occur at least quarterly, with at least one week's notice. A special meeting of the Board shall occur immediately following any Convention. Other special, emergency, or informal meetings of the Board may be called at the written request of any three members, on three days notice to all Board members. Any Regular member may attend or obtain the minutes of any Board meeting, unless two-thirds of the Board members agree to a closed session, at which the Board may deliberate, but not adopt, exceptional motions.

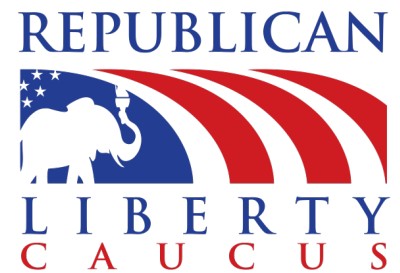
Section 5: In any dispute between the Caucus and this Charter, the decision of the Caucus Board of Directors shall be final.

ARTICLE V: OFFICERS

Section 1: The Officers of the Charter shall consist of a Chairman, Vice-Chairman, Secretary and Treasurer, who shall all be voting members of Board and subject to the provisions of the preceding Article. Candidates for Officer shall have been Regular members of the Charter for at least one year prior to their nomination. Candidates for Chairman and Vice-Chairman shall have been Regular members for at least one and a half years and members of the Board of Directors for at least six months prior to their nomination.

- A. Officers of the Charter defined under this article before the first even-numbered year Convention of the Charter as defined in Article VI will serve the lesser of 2 years or until the first Convention as defined in Article VI.
- B. Officers of the Charter need not satisfy length of membership requirements under this article until the Charter has been in existence for at least 3 years.

Section 2: Elected Officers shall assume office at the close of the Convention at which they are elected. Any Officer may be dismissed for misconduct or malfeasance upon thirty days notice to the Officer and a majority vote of all members of the Board. Any Officer vacancy may be filled by a majority vote of all members of the Board. New Officers must qualify under the provisions of the previous Section and



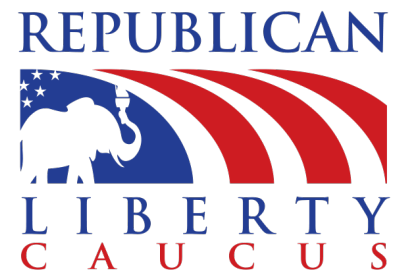
shall assume office immediately upon election by the Board. If Officer vacancies occur between Board meetings, the seceding officer listed in the preceding section, followed by At-Large Board members, shall serve as the acting Officer until the next meeting of the Board.

Section 3: The Officers shall perform such duties as are prescribed in these Bylaws.

- A. The Chairman shall be the primary spokesman of the Charter; shall execute the resolutions of the Board of Directors; shall preside at meetings of the Board and official sessions of any Convention, unless absent or replaced by an Acting Chairman, and shall ensure the administration of all provisions of these Bylaws. The Chairman may appoint any Regular members as special project or liaison directors of such standing or special executive committees or projects as he deems appropriate for the performance of these duties.
- B. The Vice-Chairman shall assume the duties and obligations of Chairman in his absence, assist the Chairman in his duties.
- C. The Secretary shall record and distribute the minutes of all Board meetings and Conventions, certify Delegates, conduct such ballots as the Board may direct, and act as Parliamentarian for all official business of the Charter.
- D. The Treasurer shall be the custodian of all Charter funds, shall propose annual budgets, safeguard the financial resources of the Charter and make quarterly reports of finances to the Board of Directors and any additional financial reports as the Board may require. The Treasurer shall receive and disburse dues sharing payments in cooperation with the Treasurer of the Caucus.

ARTICLE VI: CONVENTIONS

Section 1: The Board shall call and hold a Regular Convention in every even-numbered year, at such place and time as the Board shall designate, for the purpose of adopting revisions to these Bylaws and Rules, electing member of the Board, adopting public policy statements, and conducting such other business as it deems appropriate.



Section 2: All members of the Charter shall be notified of the Regular Convention at least sixty days prior to the designated date of the Convention. Such notice shall include the location, calendar of events, official business to be conducted and such other information as would facilitate and encourage attendance by Charter members.

Section 3: All Regular members certified by the Treasurer as having paid current dues at least thirty days prior to the Convention shall be qualified to be voting Delegates for all official business conducted during the Convention. No Delegate shall be required to pay any fee for participation in official business, but may be required to register and pay for such events or services the Board deems beneficial to the Charter and attractive to the members.

Section 4: A quorum for Regular Convention business shall be a majority of the certified Delegates who have registered as being in attendance with the Secretary, or such Credentials Committee as the Secretary shall designate. The Convention shall be governed by the latest version of Robert's Rules of Order which are consistent with these Bylaws and Rules, unless a majority of the registered Delegates adopt special rules for the duration of the Convention. There shall be no absentee or proxy voting on any official business.

Section 5: In the event of an emergency, the Board may, by a two-thirds vote, postpone a Regular Convention for no more than ninety days and shall notify members by the best means available.

Section 6: The Board may call a Special Convention at any time by a majority vote. Special Conventions may only conduct such official business as may be explicitly authorized by a two-thirds vote of the Board. If such official business is authorized, the preceding sections of this Bylaw relating to notice, Delegate status and proceedings shall apply to official sessions of the Special Convention. Special Conventions may include such events and services as the Board deems beneficial to the Charter and attractive to the members.



ARTICLE VII: STATEMENTS OF POSITIONS

Section 1: Statements of Position may be adopted by a two-thirds vote of the certified and registered Delegates at any Regular Convention, or the official sessions of any Special Convention which may be authorized by the Board under these Bylaws.

Section 2: Statements proposed by a majority vote of the Board or in a Petition signed by no less than twenty-five Regular members at least forty- five days prior to the Convention date may be submitted to the Delegates for adoption.

Section 3: All proposed Statements shall conform with the Caucus Statement of Positions or state and local applications of the Charter Purpose. Prior to Convention consideration, copies of the proposed Statements shall be submitted in writing to the Caucus Board at least ten days before the Convention for review, advice and consent.

Section 4: Notice of all proposed Statements shall be distributed to Regular members with the notice of Convention.

ARTICLE VIII: LOCAL CHAPTERS

Section 1: The Board shall encourage and certify the chartering of such local, county and regional chapters within the state which qualify under the provisions of these Bylaws and Rules. The Board may certify qualified State Charters by a majority vote at a regular meeting.

Section 2: The Board may set such minimum criteria for local chapter bylaws and require such verification of Regular membership as it deems appropriate for certification.

Section 3: In any dispute between the Charter and any chapter, the decision of the Charter Board of Directors shall be final.

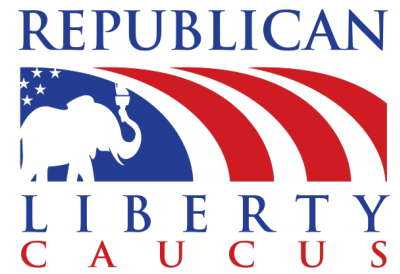


ARTICLE IX: AMENDMENT

Section 1: These Bylaws may be amended by a two-thirds vote of the certified and registered Delegates at any Regular Convention, or the official sessions of any Special Convention which may be authorized by the Board under these Bylaws. Amendments proposed by a majority vote of the Board or in a Petition signed by no less than twenty-five Regular members no less than forty-five days prior to a Convention may be submitted to the Delegates for adoption. Notice of proposed amendments shall be distributed to all Regular members with the notice of Convention.

Section 2: Amendments shall go into effect immediately, unless otherwise stated in the proposed Amendment.

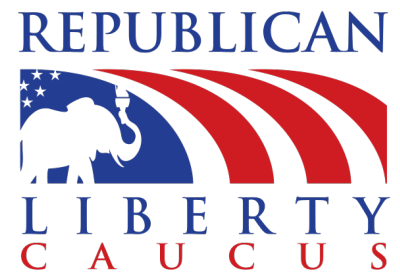
Section 3: Charter Rules may be amended by a majority of the certified and registered Delegates, or by a two-thirds vote of the Board, after at least thirty days notice.



CHARTER RULES

RULE 1. STANDING COMMITTEES

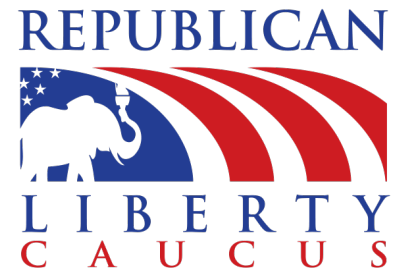
- A.** The Activities Committee shall plan, arrange, promote, and conduct all events, including informal meetings and Regular or Special Conventions of the Charter.
- B.** The Candidate Review Committee shall obtain, review, and distribute information on candidates, and recommend candidates for endorsement by the Board.
- C.** The Legislative & Regulatory Affairs Committee shall monitor bills and rules under consideration by the _____ State Legislature and relevant state regulatory agencies, coordinate with the Public Relations Committee to inform members of relevant legislative activity, recommend legislation for endorsement or opposition by the Charter, and arrange for qualified members to testify on behalf of the Charter when appropriate.
- D.** The Membership Committee shall promote new memberships, encourage membership renewal, and ensure the maintenance of an accurate membership database. It shall promote, assist and process all Petitions for local, county, or regional chapters of the Charter.
- E.** The Public Relations Committee shall supervise, maintain, and conduct communications among the members, the media, and the general public. This shall include drafting press releases, policy statements, interview guidelines, and other communiques as appropriate for the Charter. This committee shall also oversee the social media presence of the Charter, ensuring regular and relevant content in accordance with the purpose of the Charter. The Committee Director shall submit communiques to the appropriate officer for review prior to being released in the officer's name.
- E.** All officers and Board members shall serve on, at least, one committee.



RULE 2. DUES SHARING

Charter membership dues may be collected by either the Caucus or this Charter organization, provided that:

- A.** The amount collected for Regular membership shall not be less than \$15, which shall be transferred to the other entity as the dues share for that member;
- B.** The standard dues collected for Regular membership shall be \$45 for both Caucus and Charter membership, of which \$15 shall be transferred to the other entity as the dues share for that member;
- C.** Either entity may collect smaller periodic dues payments toward membership, but shall allocate the first receipts to dues sharing with the other entity;
- D.** No dues transfer shall be required for members making dues payments to the Charter who are residents of unchartered states or territories;
- E.** The Caucus or Charter organizations may offer such premium membership rates or services as may be designated by their executive committees, subject to the same fixed dues sharing amounts as Regular membership;
- F.** Honorary memberships may be offered by either the Caucus or Charter organizations, but if they grant any of the rights of Regular members, the granting entity shall pay the other entity the dues share for that member;
- G.** Contributions or donations made by non-members shall be subject to dues sharing unless the contributor or donor declines Regular membership privileges;
- H.** All contact and payment information received by either entity shall be communicated to the other entity, at least as often as shared funds are disbursed under the Bylaws;
- I.** Membership shall expire upon the Anniversary date of the last payment made by an Regular member.



RULE 3. CANDIDATE ENDORSEMENTS

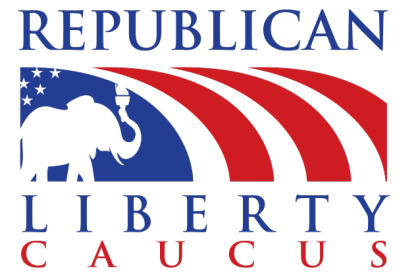
Any candidate endorsement by the Charter shall comply with the following:

- A.** The endorsement of candidate for federal office may be proposed by a majority vote of either the executive committee of the Caucus or the Charter state where a candidate is to be elected. No proposal for endorsement shall be official or made public until it has been confirmed by a majority vote of the other executive committee.
- B.** No candidate contesting an election against any Republican Party nominee (winner of any applicable Republican Party primary election) may be proposed for endorsement by the Caucus;
- C.** The Charter Board may endorse candidates for any state legislative seat or state cabinet-level positions, and any other state/local offices, but endorsements of candidates for state executive offices shall require the same Caucus confirmation as candidates for federal offices;
- D.** A primary candidate for President of the United States may not be endorsed by the Charter or the Caucus in the absence of a majority vote of the Caucus Board and each Chartered State's executive committee;
- E.** Preference shall be granted to any candidate who has signed the "Liberty Compact" of the Caucus or who has been rated as "libertarian" in the "Liberty Index" of the Caucus;
- F.** Endorsements may be withdrawn for good and sufficient reasons upon the majority vote of both the proposing and confirming executive committees;

RULE 4. PUBLIC POLICY STATEMENTS

The executive committees of the Caucus or Charter States may adopt and issue public policy statements which do not conflict with the Statements of Positions specified in these Bylaws:

- A.** Public positions related to federal legislation may only be adopted by a majority vote of the Caucus Board after at least two days notice;



B. Public positions related to state legislation or administrative rules may only be adopted by a majority vote of the Charter Board, but shall not conflict with any prior policy position adopted by the Caucus;

C. No resources of the Charter shall be used to promote any commercial enterprise without the advance contractual approval of the Board.

RULE 5. POLITICAL ACTION COMMITTEES

The Charter Board may establish a political action committee, hereinafter “PAC”, under the applicable state statutes, for the purpose of contributing to state or local candidates for public office, provided:

A. The PAC shall be designated with the proper state authorities as a membership committee of the Charter;

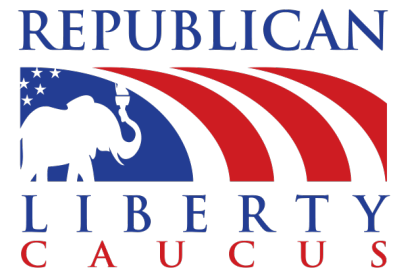
B. The Board of Directors of such PAC shall include all of the Officers of the executive committees of the Charter;

C. The PAC shall be constituted with such bylaws and rules as are consistent with Charter Bylaws and Rules;

D. The PAC shall not contribute to any candidate who has not received a public endorsement by the Charter in compliance with the applicable Rules;

E. The PAC shall not contribute to any federal candidate and shall forward any donations designated for federal candidates to the designated Caucus PAC;

F. All PAC donations and contributions, as well as all contact information obtained by the PAC, shall be disclosed promptly to the Caucus and the Caucus PAC.



RULE 6. ELECTRONIC VOTING

Votes of the Board may be taken by electronic ballot via either eMail or eGroup tabulations conducted by the Secretary under the following rules:

- A.** Electronic ballots shall be issued to all Board members on any resolution submitted by at least three Board members to the Secretary;
- B.** The Secretary shall issue an electronic ballot within two days and shall receive and tabulate all ballots received within seven days of issue;
- C.** If any Officer or At-Large Board member fails to cast a ballot, the Secretary shall record them as absent and substitute the ballots of Alternate members in the chronological sequence in which they were received;
- D.** The Secretary shall inform members of ballots cast and provide members who have not cast a ballot with a two day reminder of the ballot deadline;
- E.** In the event that fewer than five ballots are cast prior to the deadline, the resolution will fail for lack of a quorum.
- F.** The results of the balloting shall be reported to Board members immediately after the deadline and recorded in the minutes of the next Board meeting.