



## PAC SET UP SERVICE CHECKLIST

- Seek and receive Board direction and/or a corporate resolution to create a political action committee
- Select a name for the PAC (legal requirement)
- Apply for a federal Tax Identification Number (EIN) (legal requirement)
- Open a bank account (legal requirement)
- Designate a PAC Treasurer (legal requirement) and Assistant PAC Treasurer (optional-strongly recommended)
- Register the PAC with the FEC (legal requirement)
- Identify and name individuals to a permanent PAC governance committee (PAC Board)
- Draft Articles of Association and By-laws
- Establish the solicitable class (legal requirement)
- Determine the PAC's disbursement policies
- Develop guidance on voluntary giving levels
- Assign administrative duties to an employee OR retain the services of a PAC compliance service
- Report back to Board/Senior management the results of this activity
- Turn over responsibility to the permanent PAC Board to manage the affairs of the PAC
- PAC Board assumes responsibility of managing the PAC
- Develop a solicitation plan and notify the solicitable class of the PAC's establishment and encourage voluntary participation
- Identify candidates for PAC donations
- Record and report receipts and disbursements to the FEC (legal requirement)
- Issue periodic reports to the solicitable class about PAC activities
- Create a website