



Checklist for changing Chartering Organizations

Turn in these documents with your charter to Dan Beard Council

- Release Assumption of Unit Charter
- New Unit Application completed by the new chartering organization
- Annual Agreement signed by the appropriate individuals from the organization
- Adult application, youth protection training certificate and background check authorization form for new Chartered Organization Representative
- Determine which unit (if more than 1 at the new chartering organization) will submit the fees for the new chartering organization representative.

Complete these steps in conjunction with your former and new chartering organization

- Transfer any titles/registrations for trailers, etc to the new chartering organization
- Identify the EIN number currently being used for your checking account and any electronic payment accounts (Square, Paypal, etc).
- Consult with your new chartering organization to determine if you will use the EIN of the new chartering organization or apply for an EIN for the unit
 - Refer to “Fiscal policies and procedures for BSA units” for more information
- Inventory any equipment and determine if changing storage locations is necessary
- Complete any necessary Facilities use agreements