

## Charity set up checklist:



### Step 1: Write your charitable purposes

Charitable purposes detail what you want to achieve as a charity

- My statement/s covers the what, where, who and how
- I've used the recommended language
- I've chosen a suitable (unique) charity name



### Step 2: Decide your charity structure

Adopt the right legal structure for your charity

- I've decided whether the charity will have just trustees or a wider membership
- I've decided between an informal (unincorporated) or formal (incorporated) structure



### Step 3. Choose your governing document or constitution

Your governing document (sometimes called a 'constitution') is the rules for your charity

- I have chosen the governing document template
- I have read the governing document template
- I have completed the governing document template



### Step 4: Recruit your trustees

Trustees are volunteers who are legally responsible for the charity

- I have recruited trustees with appropriate experience/skills
- The trustees I have chosen understand what is involved in being a trustee



### Step 5: Money matters

Every charity needs to keep careful financial records and have a bank account

- I have set up a bank or building society account in the charity name
- We are keeping careful financial records
- We understand our accounting responsibilities to the Charity Commission



### Step 6: Apply for registration

You are now ready to register online with the Charity Commission

- I have completed the Charity Commission application form
- I have uploaded all the documents required by the Charity Commission
- I have submitted my registration to the Charity Commission