



## **PRO BONO FOR NONPROFITS**

A Program of the Volunteer Lawyers Program  
of the  
Mecklenburg County Bar

### **REQUEST FOR BUSINESS LAW SERVICES**

**Please be aware, information provided about your organization in this application is not covered by Attorney-Client Privilege.**

Through an initiative of the Mecklenburg County Bar Volunteer Lawyers Program non-profit charitable organizations engaged in community social and/or economic development are matched with volunteer business lawyers having special skills and legal expertise in a wide range of transactional matters.\* Our volunteer lawyers offer legal services relating to contracts, tax exemption, real estate, banking, incorporation, trademarks, employment, and many other areas of business law. The purpose of this application is to detail your organization's need for these types of services. This application should not be used to assess any litigation needs. To be eligible for volunteer legal services, your organization must meet the following criteria:

1. The organization must be a non-profit organization;
2. The organization's decision-making process has significant local community grassroots involvement;
3. The organization is working, at least in part, to provide housing, economic opportunities, social services, educational improvement, ownership of land, or cultural preservation to low-income populations or communities; and
4. The organization is unable to pay for legal services, or such payment would substantially negatively impact its charitable work.

\*The Pro Bono for Nonprofits program and the Mecklenburg County Bar are not affiliated with any religious organization.

We encourage you to complete and submit this request, even if you are uncertain whether your organization meets these criteria.

#### **Types of Legal Services Offered**

Through the use of volunteer Attorneys, the Mecklenburg County Bar Association can provide legal advice and services in the following areas of law.

- Organizational Structure/Operation
  - Counseling on types of Business Entity

- Formation/Structure of Board of Directors
  - Drafting Bylaws, Conflict of Interest Policies and Articles of Incorporation
  - IRC 501(c)(3) Designation
  - Obtaining an EIN
  - Counseling on Annual Reporting Requirements
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- Local or State Business Licensing
  - Review of Real Property Purchases, Leases and other Contracts
  - Review of other legal documents currently in use by the organization
  - Advising as to the potential for liability given the nature of the business activity
  - Advising as to Insurance related issues
  - Advising as to Employment related issues
  - Counseling on compliance with federal, state, and local law and rules and regulations

**Request for Pro Bono Legal Assistance**

This form will help the Mecklenburg County Bar Volunteer Lawyers Program to learn more about your organization and its legal needs. Please print out this form, fill it out as completely as possible and fax or e-mail it to \_\_\_\_\_.

Please include any other information that you think might be helpful, using additional sheets if necessary. The Mecklenburg County Bar Volunteer Lawyers Program assists organizations with the application for 501(c)(3) tax-exempt status on a case-by-case basis only. Please see additional requirements at end of form if you are seeking assistance with the 501(c)(3) application.

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Website Address: \_\_\_\_\_

Name of contact person: \_\_\_\_\_

Title: \_\_\_\_\_

Work Phone: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Describe the purpose and/or mission of the organization, attaching brochures and a one-page mission statement, if desired.

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Specifically identify in which way the organization's decision making process has significant local community grassroots involvement and identify how your organization provides, at least in part, housing, economic opportunities, social services, educational improvement, ownership of land or cultural preservation to low income populations or communities (please attach separate pages, if necessary):

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For how many years has the organization existed? \_\_\_\_\_

Is the organization incorporated? Yes No Month/Year of Incorporation:\_\_\_\_\_

Tax-Exempt (have you received 501(c)(3) tax-exempt status from IRS)? Yes No

Month/Year you received tax-exempt status:\_\_\_\_\_

How many people are involved in running the organization?

Board Members\_\_\_\_\_ Staff\_\_\_\_\_ Volunteers\_\_\_\_\_ Independent Contractors\_\_\_\_\_

List the Board of Directors and Officers, including titles and affiliations (attach a separate sheet if necessary):

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About how many people does the organization currently serve? \_\_\_\_\_

What is the organization's annual budget for the current year? \$\_\_\_\_\_

What are the total gross receipts/revenues from the most recent fiscal year? \$\_\_\_\_\_

Is there a line item in the organization's budget for legal fees? Yes No

If yes, how much is budgeted for legal fees? \_\_\_\_\_

**Please check only the type of legal service(s) your organization is currently in need of:**

- Organizational Structure/Operation
  - Counseling on types of Business Entity
  - Formation/Structure of Board of Directors
  - Drafting Bylaws, Conflict of Interest Policies and Articles of Incorporation
  - IRC 501(c)(3) Designation
  - Obtaining an EIN
  - Counseling on Annual Reporting Requirements
- Local or State Business Licensing
- Review of Real Property Purchases, Leases and other Contracts
- Review of other legal documents currently in use by the organization

- Advising as to the potential for liability given the nature of the business activity
- Advising as to Insurance related issues
- Advising as to Employment related issues
- Counseling on compliance with federal, state, and local law and rules and regulations
- Other

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Please provide the name and affiliation of any lawyer that is now helping or has helped your organization, briefly describing the services provided.

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Please provide the name, telephone number, and affiliation of any attorney(s) that sit on the organization's board of directors.

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Please tell us where you heard about the Mecklenburg County Bar Volunteer Lawyers Program.

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**Additional Information (Required only for organizations seeking assistance with an application for 501(c)(3) status).**

If you are seeking assistance with your 501(c)(3) application, attach a business plan that includes a projected budget. If you have sample grant proposals, brochures, flyers, or similar materials describing your goals and activities, attach those as well. At a minimum, the business plan should address the following:

- a. Mission of the organization,
- b. A detailed description of the activities/programs conducted to accomplish this mission,

- c. The target beneficiaries of the activities/programs,
- d. The community where the activities are to be conducted, including identification of other organizations addressing the same issues in the community and how this organization differs,
- e. The organization's expected sources of financial support and its specific plans for fundraising and sustainability,
- f. The projected budget for the next three years,
- g. Number of employees and volunteers with job descriptions and salaries for key staff, and
- h. Whether the organization will make grants, and if so, to whom.

By signing this form, I am agreeing that the information I have provided to the Mecklenburg County Bar Volunteer Lawyers Program may be disclosed to attorney volunteers and law firms in efforts to recruit assistance for the organization. I understand that information provided in this application is not covered by Attorney-Client Privilege.

I hereby certify that all of the information in the Request for legal services is true to the best of my knowledge. I know that completion of this application does not guarantee legal assistance and the Mecklenburg County Bar Volunteer Lawyers Program reserves the right to reject this application and to prioritize the requests it receives.

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_