

UNA Formation Guide

Complete Step-by-Step Instructions for Forming Your
Unincorporated Nonprofit Association

title: "UNA Formation Guide"

type: "lead_magnet"

category: "guides"

status: "published"

created: "2025-09-16"

modified: "2025-09-16"

UNA Formation Guide

The 7 Steps Every Group Needs to Know

Introduction

Forming an **Unincorporated Nonprofit Association (UNA)** is a decisive act of collective creation. It is a way of creating organizations that reflect their members and their shared vision. A UNA offers a parallel path: it is legally recognized, yet flexible enough to let your group define how it values people, resources, and purpose.

At its heart, UNA formation is about sovereignty in community. It allows groups to come together, organize around shared goals, and make choices that align with their values, whether that includes pursuing profit to reinvest in the mission, cultivating cultural expression, or sustaining collective wellbeing.

This guide walks you through the essential steps of UNA formation. It is both a practical roadmap and an invitation to imagine what becomes possible when we organize in ways that mirror who we truly are.

The 7 Steps

1. Gather Members

A UNA requires at least two people. Choose members who are committed, trustworthy, and aligned with your group's values.

> **Tip:** Write down names, roles, and contact info for at least 2–3 people.

2. Define Your Purpose

Your purpose is the anchor for everything your UNA does. Keep it clear, simple, and actionable.

> **Tip:** Start with: *"Our UNA exists to..."* and keep it to 1–2 sentences.

3. Write a UNA Agreement

This is your governing document. It should include:

- Members and roles
- Purpose
- Decision-making process
- Meeting schedule
- How funds will be handled

> **Tip:** This agreement will be required when applying for an EIN and opening a bank account. You can find sample UNA Agreements by searching online or by visiting our FAQ and blog at unaguide.com.

4. Apply for an EIN (Federal Tax ID)

An EIN allows you to open a bank account and manage funds collectively.

> **Action:** Apply online at the [IRS EIN website](https://irs.ein.gov). It's free and approval is immediate.

5. Check State Requirements

Some states require UNA registration; others do not. Filing usually involves a short form and small fee (\$25–\$100).

> **Action:** Visit your Secretary of State's website and search for *"Unincorporated Nonprofit Association"* or *"Nonprofit filings."*

6. Open a Bank Account

A dedicated UNA bank account protects members and ensures transparency.

> **Tip:** Bring your EIN and UNA Agreement. Compare **local credit unions** (community focus) and **online banks** (convenience, lower fees).

7. Maintain Written Records

Good records strengthen leadership and accountability. Keep track of:

- Member roster
- Meeting notes
- Financial activity

> **Tip:** Create folders for "Members," "Meetings," and "Finances." Tools like Google Drive, Airtable, or bookkeeping software can help.

Quick Checklist

- ☐ 2+ Members
- ☐ Purpose Statement
- ☐ UNA Agreement
- ☐ EIN
- ☐ State Registration (if required)
- ☐ Bank Account
- ☐ Records of Members, Meetings, Finances

Ongoing Guidance

Forming a UNA is the beginning. Ongoing leadership includes updating your agreement, keeping accurate records, and making decisions that reflect your group's evolving purpose.

If your UNA plans to fundraise, hire staff, or apply for grants, additional steps may be required. Consider booking a **Strategy Session** for tailored guidance.

Next Steps

- **Get Support:** Book a [Strategy Session](#) (\$250, credited toward document preparation).
- **DIY Resources:** Explore our Toolkit online.

Prepared by UNA Guide / unaguide.com

Prepared by UNA Guide | unaguide.com

For professional assistance with UNA formation, visit our website or contact our team.