



## **Checklist for US Chapters in Formation**

### **Stage 1 – Inquiry (IR)**

**Step 1 - Inquirer Form**

**Step 2 – Feasibility Assessment by Liaison**

**Step 3 – Reference form by Liaison and Pastor**

### **Stage 2 – Contact Person (CP)**

**Step 4 – Discernment Prayer Meetings and Reports**

**Step 5 – Selection of a Service Team (ST)**

### **Stage 3 – Service Team (ST)**

**Step 6 – Application and Fee**

**Bishop review of International Statutes for 1<sup>st</sup>  
Chapter in Diocese only.**

**Bishop Approval of Chapter Spiritual Advisor**

**Step 7 – Applying for Incorporation, By Laws, & Federal ID  
(EIN/Employer Identification Number)**

**Step 8 – Modified Statutes, IRS Tax Exempt Status with  
inclusion in Official Catholic Directory (OCD)  
Chapter Checking Account**

**Step 9 – Unsigned License Agreement review  
Marian/Popular Name chosen**

**Step 10 - 1 Year validated License Agreement, Beginning of  
Meal Planning**