

Charity Incorporation

5 tips for incorporation

There's lots of things that can affect the incorporation process. Knowing these in advance and preparing for them will help you navigate the process more smoothly.

1 Understand the timescales

Incorporation can take time.

A lot will depend on:

- your type of charity
- what assets and liabilities you have
- any other Regulators you report to
- what third parties you need to contact



2 Get talking

The charity trustees need to discuss and decide what the best option for the charity is.

If the charity has members you need to talk to them too.

Get advice from professionals who can help you through the legal processes.

3 Check your paperwork

Before you can start the process with OSCR find out what your governing document says about winding up the old charity and what happens to the assets.

Make sure your accounts are up to date and have been filed with OSCR.



4 Establish clear expectations

Incorporation can take time.

A lot will depend on other organisations you deal with, like your bank or funders, and what they need you to do.

Find out first what other organisations you need to contact, the information they will ask you for and how long their processes take.



5 Prepare your application to OSCR

Be clear about what you want to achieve.

See our documents checklist.

Don't be afraid to ask questions of your advisers.

