



Federal Bar Association

Policy No. 10-2: Examination and Copying of Books and Records

Approved By: Jackie A. Goff, Secretary

Date Approved: March 13, 1987

Date Effective: March 18, 1987

Policy:

The policy of the Federal Bar Association is that any member may have the opportunity to examine and copy the books and records of the Association other than the names and addresses of members, tax returns, or tax exemption information. The request to examine or copy such books and records shall be in writing and addressed to the Executive Director and must state the intended use of the information to be copied. The Executive Director shall approve or refuse the request and notify the requester of same. Absent other provision made by the Executive Director, the examination shall be made within the offices of the Association during regular business hours. The examination may be made by an authorized agent or attorney.

Any member of the Association requesting tax returns or tax exemption records of the Association may request and receive copies of Form 990 (Return of Organizations Exempt from Tax) for up to the prior three (3) years and/or copies of the Association's application for tax exemption and related documents. Such documents shall be provided promptly upon request and no later than thirty (30) days after written request.

The request of a non-member to examine the books and, tax returns, or tax exemption records of the Association will be addressed by the Executive Director and the President on a case-by-case basis.

All costs incurred by the Association in copying the documents will be the responsibility of the individual requesting the copy. The copying of the documents(s) will be done by staff and copies provided to the requester.

Purpose:

To provide a written policy statement that formalizes the methods and procedures by which a member or non-member of the Association may request and be granted access to and copies of the books and records of the Federal Bar Association.

Change Notice: Amended 9/18/1996; 6/24/2011.