

National Association of Benefits and Insurance Professionals

CAHIP Chapter Checklist

With NAHU changing its name to the National Association of Benefits and Insurance Professionals (NABIP) on January 1, 2023, the chapters will need to do the same in order to remain as part of the organization. To assist the chapters with this process below is a checklist of what needs to be done and guidance for completion.

1. **Amend chapter bylaws (Articles of Incorporation)** with new the chapter name. Your chapter's new name will be "National Association of Benefits and Insurance Professionals (*current chapter name*) chapter". For example, Indianapolis Association of Health Underwriters will become National Association of Benefits and Insurance Professionals Indianapolis Chapter.

Model state and local bylaws are available. If your chapter's bylaws are more complicated, we are happy to review and provide input as to how to amend the chapter's bylaws. Send a email request to chapters@nahu.org. If the only change being made to the chapter's bylaws is the name change, a vote is not required.

2. **File the name change with your state.** The chapter's updated bylaws (Articles of Incorporation) will be needed to be complete this process.

Each state has different requirements for filing a name change. Please consult your state's Secretary of State website for what is specifically needed for this filing.

3. **File the name change with the IRS.** This step can be started after the state approves the name change. A nonprofit must notify the IRS of its name change, particularly if the nonprofit has tax-exempt status. In most cases, this is done by submitting the state's confirmation of the name change to the IRS along with the nonprofit's federal tax ID number and exemption details. This name change notification must also be signed by a Board officer.

If you are not sure if your chapter has exempt status and maintained it with regular tax filings, you can search the IRS database: [Results for Tax Exempt Organization Search \(irs.gov\)](https://www.irs.gov/efile/efile-lookup) or check with NAHU to see if your chapter's Letter of Determination is on file with NAHU.

4. **Update the chapter's banking information.** *CAHIP chapters should update their banking information utilizing their DBA. Remember, checks issued in CA need to be recognized by your CAHIP name.* Contact your bank to determine what is needed to complete this process.
5. **Update the chapter's website.** *CAHIP chapters should purchase domains utilizing both their CAHIP DBA and NABIP corporate name (that redirects to the CAHIP DBA website). Your existing "AHU" site should also redirect to the CAHIP DBA site.* See the Digital Brand & Style Guide for details on color, layout, etc.
6. **Ancillary items update** (letterhead, newsletters, promotional gifts, awards, etc.) *CAHIP will update its logo and share the graphics with chapters as well as offer logo design assistance.* See the Digital Brand & Style Guide for details on color, layout, etc.
7. **Notify** vendors, state legislators, and other chapter contributors and contacts.

If completing this process is a financial burden for the chapter, please complete the Chapter Financial Assistance Application.