
How to Request a NYS Sales Tax Exempt Form

NYFA can issue a tax-exempt form for a specific large purchase needed for your sponsored project. We do not issue these certificates for small purchases (ex. office supplies).

How to request a NYS Sales Tax Exempt Form:

1. Contact your vendor to determine if they will waive sales tax. It is always the vendor's discretion if they choose to honor a sales tax exemption. The vendor must be located in New York State, as the sales tax exemption only applies to NYS sales tax.
2. Obtain an invoice from your vendor for the items that you will be purchasing. It does not matter whether or not sales tax is included in this invoice.
3. Create a vendor payment request in the NYFA.org portal and upload the invoice.
 - a. The payee will be your vendor.
 - b. Request a tax-exempt certificate in the 'Notes' section of the request.
 - c. Make sure the request amount matches the invoice without tax.
 - d. NYFA will issue an ACH direct deposit payment to your vendor. You will need to add your vendor's banking information in this Submittable form: <https://nyfasponsorship.submittable.com/submit/0f67c692-d6cc-40dc-b920-7ef3c751b5d7/fs-nyfa-payee-info-for-ach-transfers?step=submission>
4. NYFA can only issue a tax-exempt certificate for a payment made through your NYFA Fiscal Sponsorship account. You need to have the full balance of the invoice in your account in order for us to issue the tax-exempt certificate. We cannot issue a tax-exempt certificate for reimbursement requests.
5. NYFA will issue you a tax-exempt certificate via email in that week's payment cycle.

Just in case you need a copy of NYFA's 501c3 IRS Determination letter, it is available in the Resource Center of your NYFA.org portal.
