

990/NON-PROFIT RETURN INFORMATION NEEDED

- Copy of prior year return (if one was filed)
- Copy of 501c approval paperwork /State paperwork/Tax ID paperwork
- Copy of Organizing document, Bylaws, Mission, etc.
- Copy of Board of Directors for year of tax return with title(s), hours worked, compensation (if any)

- Does organization have following policies:
 - Conflict of Interest Policy _____
 - Written Whistleblower Policy _____
 - Document Retention & Destruction Policy _____
 - Policy to determine & review compensation by independent person(s) _____

- Quickbooks Backup if available - should be either .qbb or .qbm
- Where/with whom are records maintained:

- Contact Person: _____

INCOME

- EVENT INCOME
- CONTRIBUTIONS AND GRANTS
- NAME & ADDRESS OF ANYONE WHO CONTRIBUTES > \$5,000
- PROGRAM SERVICE REVENUE
- INVESTMENT INCOME
- BANK STATEMENT OF FINAL MONTH OF YEAR END

EXPENSES

- GRANTS PAID OUT
- EVENT EXPENSES - LIST INDIVIDUAL EVENTS
- FUNDRAISING EXPENSES
- PROGRAM SERVICE EXPENSES
- MANAGEMENT & GENERAL EXPENSES - LIST EACH EXPENSE