



In order to complete your IRS Form 990 gather the following:

1. Copy of financial statements
2. Trial balance for in Excel
3. List of contributors (including foundations, individuals and other exempt organizations) whose contribution during the fiscal year was \$5,000 or greater.
  - a. For each contributor please provide the Name, address, Zip and aggregate contribution.
4. Provide a statement of program service accomplishments. You can state the number of clients served, publications issued, etc. Discuss the achievements that are not measurable. Depending on the nature of your programs you may be able to summarize the impact on the community
5. Value of goods provided to community in the year.
6. Executive Director and Key Employees paid (based on their Form W-2 for the year) if any:
  - a. Name, address, title, average hours worked per week, and compensation paid.
  - b. Contribution to pension plan and expense account, if any.
  - c. The breakdown of salary for Program services, Mgmt. & General and Fundraising.
7. Independent contractors paid over \$100,000 during the year:
  - a. Name, address, type of service provided, and compensation paid.
8. List of Board of Directors, etc. who received compensation:
  - a. Same information as in 3(a), 3(b) and 3(c) above.
9. List of Board of Directors and average hours per week.
10. Who should we state the books are in care of?
11. If any former officer, director, trustee or key employee received compensation or other benefits, such as compensation, loans and advances, contributions to employee benefit plans, expense account and other allowances, during the year, list that person and enter the amount corresponding to each type of compensation of benefits as indicated above.
12. Total number of volunteers (estimate if necessary)?
13. If the organization has a fundraising event, please provide the gross receipt, direct expenses which consist of cash prizes, noncash prizes, rent/facility costs, food and beverages, entertainment and other direct expenses.
14. How many w-2, w-2G and 1099 were issued as for the calendar year?
15. Is there any income that is subject to unrelated business income tax?
16. Who will be signing the tax return?