



Nonprofit Tax Filing Checklist

Use this checklist to prepare for your annual nonprofit tax filing. Whether you're filing a 990-N, 990-EZ, or full Form 990, these documents help ensure you're compliant and organized.

- IRS Determination Letter (proof of exemption)
- EIN Confirmation Letter
- Articles of Incorporation or Bylaws
- Prior year's Form 990 (if available)
- Total revenue and expense breakdowns
- List of board members and officer titles
- Year-end bank statements or accounting reports
- Donation/grant reports (if applicable)
- Breakdown of program, admin, and fundraising costs
- IRS or state correspondence, if any

Need help? Contact WealthCrest Financial

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