Here are some pieces of information to have on hand before you start filing your Form 990.

☐ Nonprofit’s Basic Information
  • Name
  • Address
  • EIN

☐ Financial Information
  • Revenue
  • Expenses
  • Assets
  • Liabilities

☐ Key Personnel, Governing Body, & Management Details
  • Name
  • Address
  • Salary

☐ Program Service Accomplishments
  • Charitable activities
  • College degree programs
  • Assistance provided to victims of natural disasters
  • Rehabilitation services provided to nursing home residents

☐ Other IRS Filings & Tax Compliance Requirements (if necessary)
  • Form 1023: Application for recognition of exemption under section 501(c)(3)
  • Form 1024: Application for recognition of exemption under section 501(a) or section 521
  • Form SS-4: Application for employer identification number
  • Form 8718: User fee for exempt organization determination letter request