Tax Information Worksheet for Tax-Exempt Entities

Forms 990/990EZ/990PF/990N for tax year ending Dec 31, 2022

Completed by: _____ Date: _____
Phone number: _____ Email: _____
Organization Name _____
Address: _____
Website: _____ EIN: _____
Name, address and phone number of the person who maintains the organization's books and records:
_____

1. State and describe the mission or exempt purpose of the exempt organization (EO) as adopted by the governing body.
_____
_____

2. Did the EO undertake any new or cease conducting any significant program services this year? If "Yes," please describe.
_____

3. Briefly describe the accomplishments for each of your three largest program services as measured by expenses.

a. _____
b. _____
c. _____

4. Total number of voting members of the governing body _____ Number that are independent _____. Please provide a list of names and titles of the directors and officers. (Please use another page.)

5. Did any trustee, director, officer or key employee (TDOKE) have a family or business relations with any other TDOKE? If so, please describe. _____

6. Were any changes made to the articles of incorporation or bylaws during the past fiscal year? _____

7. Will a copy of Form 990 be provided to the organization's governing body before it is filed? Describe the process to be used (if any) to review the Form 990. _____

8. Describe how the following are made available to the public (i.e., own website, another's website, or upon request):

Form 1023 (or 1024 if applicable):	
Form 990EZ, 990, or 990-PF:	
Form 990-T (if applicable; Sec 501(c) (3)s only):	
Governing documents:	
Conflict of interest policy:	
Financial statements:	

9. Enter the number of employees reported on Forms W-3 (including those filed by a reporting agent). _____

10. Enter the total number of full-time and part –time volunteers (estimate if necessary). FT_____ PT _____

11. Did the organization receive forgiveness of a PPP loan during 2022? _____

12. Did the organization have unrelated business gross income over $1,000 during the tax year? _____ If "Yes," a Form 990-T may be required to be filed. If so, please describe unrelated business activities. _____

* If this is the first year Impact Tax Group will prepare the Exempt Organization's tax return, please provide copies of the following:

a. Application for tax-exempt status (Form 1023 or 1024).
b. IRS letter of determination of exempt status, or for any qualified retirement plan.
c. Articles of Incorporation & bylaws.
d. Prior three years tax returns and amended returns (if any).