

Application for Nonprofit Federal Tax Exemption (IRS Form 1023) Preparation Checklist

- Formation/Incorporation date
- EIN Number
- Copy of established conflict of interest policy (If Applicable)
- Articles of incorporation/organization/association or trust agreement
- Copy of lease agreement(s) & and any established contract(s)
- List of Directors/employees & their compensation (If applicable)
- Familial/business relationship to each other (If applicable)
- Basic description of Goods & Services to be Provided & Program Limits
- Proposed Fundraising Activities
- Last four (4) years of tax returns & Financial Statements or projections
- Fee for submitted Application

Note: This checklist is intended to assist you in gathering data for preparing your application.