

Non-Profit Tax Exemption Supporting Documents Checklist

Required Documentation

1. Completed Federal and State Tax Exemption Applications (e.g., IRS Form 1023 or 1024 & State equivalent)
2. Certified copy of the organization's Articles of Incorporation
3. Organization's Bylaws (signed and dated)
4. Employer Identification Number (EIN) Confirmation Letter from IRS
5. List of Board of Directors (names, titles, and contact information)
6. Detailed Narrative of Organization's Activities and Purposes
7. Conflict of Interest Policy (adopted by the Board)
8. Latest Financial Statements or Projected Budget for Upcoming Year
9. Minutes from Organizational/First Board Meeting
10. Sample Fundraising Materials (if applicable)

Optional / Additional Documents

- 501(c)(3) Determination Letter (if already obtained)
- State Charitable Registration Certificate
- Grant Award Letters or Promises of Support
- Lease or proof of address for organization's primary location
- Contracts, Memoranda of Understanding (MOUs), or Partnership Agreements

Important Notes

- Ensure all documents are signed, dated, and consistent with each other.
- Keep copies of all submitted documents for your records.
- Requirements may vary by state—check with local authorities for additional needs.
- Submission of incomplete or outdated documents may delay processing.