END OF YEAR COMPLIANCE CHECKLIST



RECORDS

- [ ] Hold an annual meeting and record minutes.
- [ ] Elect officers and directors
- [ ] Produce financial reports
- [ ] Approve the upcoming year budget
- [ ] Review bylaws and update as needed

IRS

- [ ] File form 990
- [ ] Perform audit if required
- [ ] Review solicitations and donor receipts
- [ ] Justify executive compensation
- [ ] Update policies including conflict of interest

STATE

- [ ] File the annual report
- [ ] Renew the charitable solicitation licence
- [ ] Maintain a registered agent

- [ ] Update any information in state records
- [ ] Register in other state as required

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