

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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