“To Do” List for Setting Up a Nonprofit

After you’ve taken the client through the many questions to be answered in deciding to form a nonprofit and all agree to move forward, you need to take these first steps in the process of establishing the nonprofit.



- [ ] Provide preorganization analysis and advice.
- [ ] Draft and file governing instruments.
- [ ] Prepare and file state and federal exemption applications.
- [ ] Prepare an operating manual for directors, officers, and staff that’s tailored to the client’s needs.
- [ ] Provide advice and forms for fundraising.
- [ ] Identify and retain a qualified nonprofit accountant.
- [ ] Locate an auditor to perform an audit if gross revenue exceeds $2,000,000. See Govt C §12586(e).
- [ ] Determine the responsible party for filings and minutes.

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