Required Information for Filing Tax Form 990

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Here are some pieces of information to have on hand _before_ you start filing your Form 990.

☐ Nonprofit's Basic Information

- Name
- Address
- EIN

☐ Financial Information

- Revenue
- Expenses
- Assets
- Liabilities

☐ Key Personnel, Governing Body, & Management Details

- Name
- Address
- Salary

☐ Program Service Accomplishments

- Charitable activities
- College degree programs
- Assistance provided to victims of natural disasters
- Rehabilitation services provided to nursing home residents

☐ Other IRS Filings & Tax Compliance Requirements (if necessary)

- Form 1023: Application for recognition of exemption under section 501(c)(3)
- Form 1024: Application for recognition of exemption under section 501(a) or section 521
- Form SS-4: Application for employer identification number
- Form 8718: User fee for exempt organization determination letter request