Organizer for Exempt Organizations

Organization:					
	EIN	Name		Dat	e Incorporated
Address:	Mailing Address	Suite #	City	State	Zip Code
Contact Name:		En	nail:		
Contact Phones: _					
	(Office)	(Home)		(Mobile)	
	Contact Mailing Address	Suite #	City	State	Zip Code

This Organizer is provided to help you gather and organize information relating to preparation of your Organizational return. Where indicated, we have provided additional worksheets and other specialized organizers where you can provide additional important information. Please provide us with a copy of the corporation's tax returns for the past 3 years if you are a first-time client of Getter Tax & Consulting Services.

- If you maintain your organization's books using a bookkeeping system such as QuickBooks or Excel, you can provide us with a backup file of your records rather than completing the income and expense and balance sheet sections of this organizer.
- If you would like our accounting staff to prepare organizational income and expense reports for you, we will need you to provide us with the following documents:
 - Organizational bank statements for all months of the year
 - Credit card statements (for organizational-use credit cards)
 - Receipts for cash purchases not shown on bank or credit card statements
 - Checkbook register (please identify all checks by entering an expense category in the memo section)

Filing Information. Please answer ALL of the following questions.			
What is the organization type? 501(C) () (insert no.) other:			
Is the organization's application for tax exempt status pending with the IRS?			
Is this a new address? Yes No Is this an initial return? Yes No Is this a final return? Yes No			
Is this a group return for affiliates? Yes No If "yes", how many?			
What accounting method does the Organization use? Cash Accrual Other (describe)			
Does the organization file under a calendar year? Yes No If "no", what is the fiscal year?			
Did the organization engage in any activity not previously reported to IRS? Yes No If yes, describe here.			
Were any changes made in the organizing or governing documents? Yes No If yes, were changes made to the organization's name? Yes No			
Did the organization have Unrelated Business Income of \$1,000 or more this year? Yes No			
Was there a liquidation, dissolution, termination, or significant disposition of assets during the year? Yes No			
Is the organization related (other than by association with a statewide organization or nationwide organization) to any other exempt or non-exempt organization? Yes No			
Did the organization make any direct or indirect political expenditures? Yes No			
Did the organization lobby/attempt to influence any legislation? Yes No If "yes", \$ spent			
If organization makes lobbying expenditures, has Form 5768 been filed? Yes No			
Did the organization comply with IRS public inspection or returns/applications? Yes No			
Did the organization solicit it any contributions that were not tax deductible? Yes No			
Did the organization make grants for scholarships or student loans? Yes No			
Did the Organization conduct activities in any state other than Oregon? Yes No Or, to any country outside the U.S.? Yes No If "yes", which states &/or countries?			
Does the organization have any foreign bank accounts? Yes No			

Name and Address	Title	Average hours/wk	Compensation

Complete the following for all employees paid more than \$100,000/year: (attach separate sheet if you have more than 2)				
Name and Address Title hours/wk Compensation				
1.				
2.				

Complete the following for independent contractors paid more than \$100,000/year: (attach separate sheet if you have more than 2)				
Name and Address	Type of Service	Compensation		
1.				
2.				
-				

Organization Income:	
	Total:
Contributions, gifts, grants	
Membership dues	
Program service revenue	
Government contracts	
Investment (Interest)	
Fundraiser or special event income (list)	
1.	
2.	
3.	
4.	
5.	
6.	
Other income (list)	

Organization Expenses:	
3	Total:
Accounting fees	
Bank Fees	
Employee Benefits	
Credit Card Fees	
Dept. of Justice Fee (OR)	
Equipment	
Fundraising	
Grants paid	
Insurance	
Internet	
Meetings	
Payroll taxes	
Postage and shipping	
Printing & publications	
Rent	
State Corporation Fees	
Supplies	
Telephone	
Travel	
Wages	
Website fees	
Other (list)	

Program Accomplishments				
In general categories, list the organization's accomplishments for the year. Include approximate number of people				
served, publications issued	, etc. Also, indicate \$ amour	t of grants provided.		
1.				
Grants: \$	Expenses: \$			
2.				
Grants: \$	Expenses: \$			
3.				
Grants: \$	Expenses: \$			
4.				
Grants: \$	Expenses: \$			
What is the organization's primary purpose?				
	- •			

Assets at beginning of year:	Assets at year end:	
Checking Account	\$ Checking Account	\$
Savings Account	\$ Savings Account	\$
Accounts/Pledges receivable	\$ Accounts/Pledges receivable	\$
Other current assets (describe)	\$ Other current assets (describe)	\$
	\$	\$
	\$	\$
	\$	\$

Liabilities at beginning of year:	Liabilities at year end :	
Accounts payable	\$ Accounts payable	\$
Grants payable	\$ Grants payable	\$
Other liabilities (describe)	\$ Other liabilities (describe)	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$

Schedule of Contributors For Organizations Exempt Under Section 501(c)(3)				
(don't complete if organization is a Private Foundation, Section 501(e), 501(k), 501(n) or 4947(a)(1)				
Complete the following for any contributors who ga				
additional pages if needed.	νο φο,σου οι πιστο (σαστί	a non odony. Addon soparate		
	Contribution			
Name and Address	(year total)	If non-cash, provide description		
1.				
2.				
3.				
4.				
5.				
6.				