

END OF YEAR COMPLIANCE CHECKLIST

for Nonprofit Organizations

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 license
- Maintain a registered agent
- Update any information in state records
- Register in other states as required

