



NONPROFIT CHECKLIST

PRE/POST FORMATION	DESCRIPTION	☒
PRE	Create a name for your Nonprofit (NPO)	☐
PRE	Create Your Overall Vision & Mission	☐
PRE	What Are Your Strategic Objectives, Goals & Initiatives	☐
PRE	Form Your NPO in your desired state	☐
PRE	EIN Number	☐
PRE	Nonprofit Form 1023	☐
PRE	Articles of Incorporation	☐
PRE	NAICS Code	☐
PRE	Business Plan	☐
PRE	Delegate NPO Officers (President/Secretary/Treasurer)	☐
POST	501c3 Letter of Determination	☐
POST	State Tax Exemption	☐
POST	UEI Number, CAGE, DUNS	☐
POST	Sams.gov Registration	☐
POST	Create Your Website	☐
POST	Required website forms (Privacy, Non-discrimination, 501c3)	☐
If Needed	Copyright or Trademark	☐
POST	By Laws	☐
POST	Board of Directors	☐
If Needed	IC Agreement or W2 agreement (if have staff/employees)	☐



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PRE/POST FORMATION	DESCRIPTION	
POST	Donation Letter	
POST	Financial Plan & Budget	
PER PROJECT	Sponsor Deck	
Each year	990 tax filing	
POST	Board of Directors	
POST	Advisory Board	
Ongoing	Lead Lists & Newsletter	
Each year	Fundraising- Annual Fund	
Every 3 years	Fundraising- Capital Campaign	
Ongoing	Fundraising- Grants, Foundations, Community Funds	
Ongoing	Government Contracting	
Ongoing	Joint Ventures	
POST	List NPO on Registries & Platforms	
Each Year	Annual Report	
POST	Case for Support	
POST	10k/month Google for Non Profit Grant, Tech Soup	
If Needed	Women or Minority Owned Business Certified	
	ONLINE VERSION	
	https://forms.gle/MHBhTrah1FK8rwSu9	