NONPROFIT CHECKLIST

AEK CONSULTING INC.
EDUCATIONAL SUPPORT

PURPOSE STATEMENT: TO GAIN UNDERSTANDING ON YOUR CURRENT STATUS, AND CREATE AN ACTIONABLE PLAN FOR GROWTH AND IMPACT.

PRE/POST FORMATION	DESCRIPTION	✓
PRE	Choose 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 Venture Opportunities	
POST	List NPO on Registries & Platforms & FREE resources	
Each Year	Annual Report	
POST	Case for Support & Capability Statement	
POST	10k/month Google for Non Profit Grant, Tech Soup, Goodstack	
If Needed	Women or Minority Owned Business Certified	
	ONLINE VERSION	
	https://forms.gle/MHBhTrah1FK8rwSu9	