

Form 990 Preparation Checklist

A quick guide to a smooth, stress-free filing season

Use this quick checklist to gather the key information your accountant will need—early, accurately, and with confidence.

1. Organization & Governance

- ✓ Legal name, EIN, and contact details
 - ✓ Board member names, titles, and service periods
 - ✓ Key officers or employees (if applicable)
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2. Donors & Contributions

- ✓ Donors who gave \$5,000+ (names, addresses, total contributed)
 - ✓ Non-cash or in-kind donations
 - ✓ Grants received from foundations or other organizations
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3. Financial Records

- ✓ Year-end statement of financial position and statement of activities
 - ✓ Revenue by source and expenses by functional areas (program, administrative and fundraising)
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4. Programs & Impact

- ✓ Brief descriptions of major programs
 - ✓ Key accomplishment or impact highlights
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Recommended Timeline

After fiscal year-end: Gather financials and donor records

2–3 months before deadline: Confirm board and program details

1–2 months before filing: Send materials to your accountant

Approach Form 990 Season with Confidence

With thoughtful preparation and trusted guidance, filing can be clear, timely, and stress-free.

Need support with your upcoming Form 990?

Attolero is here to help.