

Financial Requirements and Attachments

The following is an overview of the requested financial documents used in reviewing the financial activity and position of nonprofit organizations applying for a 2021 IMPACT 100 grant.

If the organization is a local chapter of a larger group organization (i.e. national/state organization) that files the IRS 990 forms, please be prepared to provide the financials for both the local organization and the parent organization, if applicable.

A. Parent Organization Financial Information:

- Copies of the appropriate IRS Forms for the 2 most recent fiscal years. Include Schedule A and also Schedule O (if used to respond to any questions). **PLEASE DO NOT INCLUDE ANY OTHER SCHEDULES. DOING SO GREATLY SLOWS DOWN THE GRANT REVIEW PROCESS.**
- Profit and Loss Statement from the date of the most recent filing through April 30, 2021.
- Balance Sheet as of April 30, 2021.
- If an extension was filed, additional items will be required.

B. Local Organization Financial Information:

**Does your local chapter (organization) have local financial information?*

If no, explain your financial relationship with your Parent Organization.

If yes, provide:

- 2020 Profit and Loss Statement and Balance Sheet.
- 2019 Profit and Loss Statement and Balance Sheet.
- Profit and Loss Statement from the end of last year through April 30, 2021.
- Balance Sheet as of April 30, 2021.

IRS Form 990 or 990-EZ filers:

- Copies of the appropriate IRS Forms for the 2 most recent fiscal years. Include Schedule A and also Schedule O (if used to respond to any questions). **AGAIN, PLEASE DO NOT INCLUDE ANY OTHER SCHEDULES. DOING SO GREATLY SLOWS DOWN THE GRANT REVIEW PROCESS.**
- Profit and Loss Statement from the date of the most recent filing through April 30, 2021.
- Balance Sheet as of April 30, 2021.
- If an extension was filed, additional items will be required.

IRS Form 990-N (e-Postcard) filers:

- Proof of the filing of the e-Postcard for the 2 most recent fiscal years filed.
Proof of 990-N filings can be found at <https://apps.irs.gov/app/eos/>
- Profit and Loss Statements for 2 most recent fiscal year's filings.
- Balance Sheets for 2 most recent fiscal year's filings.
- Profit and Loss Statement from the date of the most recent filing through April 30, 2021.
- Balance Sheet as of April 30, 2021.

Note:

If the organization has existed for less than two years, please provide the financial data, as noted above, since the organization's business start date.

Step by Step Guideline for Financial Information Requirements

****Is the Organization a local chapter of a larger Organization that holds the 501(c)(3)?***

- If yes, proceed to Page 4.
- If no, continue to next question.

****Select one: 990/990EZ Filer 990-N (e-Postcard) Filer No IRS filing***

- IF 990/990EZ Filer, go to next step on this page.
- IF 990-N (e-postcard) Filer, proceed to Page 3.
- IF No IRS filing, proceed to Page 3.

990/990EZ filers:

****What date does your fiscal year end? Month/Day ____/____***

1. Did the organization file an extension for 2020?
 - If no...move to Step 2.
 - If yes, upload the following documents (*) in addition to those below:
 - 2020 extension request*
 - 2020 Profit and Loss Statement*
 - 2020 Balance Sheet as of End of Year*
2. Upload the most recent 990.
3. Upload the previous year 990.
4. Upload a Profit and Loss Statement from the date of your most recent filing through April 30, 2021.
5. Upload a Balance Sheet as of April 30, 2021.

990-N (e-Postcard) filers:

**What date does your fiscal year end? Month/Day ____/____*

1. Upload proof of the most recent filing.
2. Upload proof of the previous year's filing.
3. Upload 2020 Profit and Loss Statement.
4. Upload 2020 Balance Sheet as of End of Year.
5. Upload 2019 Profit and Loss Statement.
6. Upload 2019 Balance Sheet as of End of Year.
7. Upload a Profit and Loss Statement from the date of your most recent filing through April 30, 2021.
8. Upload a Balance Sheet as of April 30, 2021.

No IRS filing:

**What date does your fiscal year end? Month/Day ____/____*

- If the organization is exempt from filing:
 - Explain exemption in text box.

- If the organization was established in 2020 or later:
 - Upload a Profit and Loss from the business start date through April 30, 2021.
 - Upload a Balance Sheet as of April 30, 2021.

- Complete the following financial information, if applicable:
 1. Upload Profit and Loss Statements from last 2 years.
 2. Upload Balance Sheet from last two End of Years.
 3. Upload Profit and Loss Statement from year end through April 30, 2021.
 4. Upload Balance Sheet as of April 30, 2021.

Organizations with Parent Organization who holds Local Organizations 501(c)(3)

A. Parent Organization Financial Information:

**What date does your fiscal year end? Month/Day ____/____*

1. Did the organization file an extension for 2019?
 - If no...move to Step 2.
 - If yes, upload the following documents **in addition to those below:**
 - 2019 Extension Request*
 - 2019 Profit and Loss Statement*
 - 2019 Balance Statement as of End of Year*
2. Upload the most recent 990*.
3. Upload the previous year 990*.
4. Upload a Profit and Loss Statement from the date of your most recent filing through April 30, 2020.
5. Upload a Balance Sheet as of April 30, 2020.

2. Local Organization Financial Information:

** Does your local chapter (organization) have local financial information?*

- If no, explain financial relationship with Parent Organization in text box.
- If yes, continue below.

**What date does your fiscal year end? Month/Day ____/____*

1. Upload a 2019 Profit and Loss Statement.
2. Upload a 2019 Balance Sheet as of End of Year.
3. Upload a 2018 Profit and Loss Statement.
4. Upload a 2018 Balance Sheet as of End of Year.
5. Upload a Profit and Loss Statement from the date of your most recent filing through April 30, 2020.
6. Upload a Balance Sheet as of April 30, 2020.

- If 990-N (e-postcard) is filed instead of 990 or 990 EZ, complete uploads with the same information requested on 990-N (e-postcard) details on page 3 of this document.