PENSACOLA BAY AREA IMPACT 100

Financial Requirements

The following is an overview of the requested financial documents used in reviewing the financial activity and financial position of nonprofit organizations applying for a 2026 IMPACT 100 Pensacola Bay Area Grant.

Tax Information Requirements:

- **IRS Form 990 or 990-EZ Filers:**
    - Copies of the appropriate IRS Forms for the 2 most recent fiscal years, include Schedule A and Schedule O (if used to respond to any questions)
    - PLEASE DO NOT INCLUDE ANY OTHER SCHEDULES, DOING THIS SLOWS DOWN THE GRANT REVIEW PROCESS
    - 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 could be found at: https://apps.irs.doWapaeos/

Financial Statement Requirements:

- **Profit and Loss Statements:**
    - Profit and Loss Statements for the 2 most recent complete fiscal years' filings *AND*
    - Profit and Loss Statement from the date of the most recent filing through March 31, 2026

- **Balance Sheets:**
    - Balance Sheets for 2 most recent complete fiscal years' filings *AND*
    - Balance Sheet as of March 31, 2026

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.

In lieu of internally generated statements (Balance Sheet and Profit and Loss Statement), an audit, review or compilation prepared by a CPA or accountant is preferred.

Parent / Local Organizations:

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

- **Parent Organization Financial Information:**
    - Copies of the appropriate IRS Forms for the 2 most recent fiscal years, Include Schedule A and Schedule O (if used to respond to any questions)
    - PLEASE DO NOT INCLUDE ANY OTHER SCHEDULES, DOING SO SLOWS DOWN THE GRANT REVIEW PROCESS
    - Profit and Loss Statements for the 2 most recent fiscal years' filings
    - Balance Sheets for the 2 most recent fiscal year's filings

- **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 the following:
    - Copies of the appropriate IRS Forms for the 2 most recent fiscal years if applicable, include Schedule A and Schedule O (if used to respond to any questions)
    - PLEASE DO NOT INCLUDE ANY OTHER SCHEDULES, DOING SO SLOWS DOWN THE GRANT PROCESS
    - Profit and Loss Statements for the 2 most recent fiscal years' filings
    - Balance Sheets for the 2 most recent fiscal year's filings
    - Profit and Loss Statement from the date of the most recent filing through March 31, 2026
    - Balance Sheet as of March 31, 2026
    - If an extension was filed, additional items will be required