

## TAX EXEMPT ORGANIZATION 2024 QUESTIONNAIRE (Form 990)

Organization Name \_\_\_\_\_

1. If this is a Membership Organization, total number of Members \_\_\_\_\_
2. Total number of volunteers (estimate if necessary): \_\_\_\_\_
3. Number of 1099s reported in Box 3 of **Form 1096**: \_\_\_\_\_
4. Number of employees reported on **Form W-3**, Transmittal of Wage and Tax Statements: \_\_\_\_\_  
If you have a paid Executive Director, please provide their **Form W-2**.
5. Number of voting members of the governing body: \_\_\_\_\_
6. Number of independent voting members (**not paid**) of the governing body: \_\_\_\_\_
7. Did the organization make significant changes to governing documents during the year? **Y/N**
8. Is the organization related to another tax-exempt organization or taxable entity? **Y/N**
9. Did the organization maintain **donor advised funds**, hold **assets in an endowment**, or hold a **conservation easement**? **Y/N**
10. Did the organization engage in gambling, lobbying or political campaign activities? **Y/N**
11. Did the organization engage in **ANY** activity outside the United States (provide grants, have employees/offices, generate revenues and/or expenses, hold a foreign bank account)? **Y/N**
12. Did the organization provide grants or other assistance in excess of \$5k to any one recipient? **Y/N**
13. Did the organization hold fundraising events that grossed over \$15k in revenues per event? **Y/N**
14. Did the organization receive non-cash contributions (donated auction items) valued over \$25k? **Y/N**
15. Did the organization receive contributions of art, historical treasures, or other similar assets? **Y/N**
16. UPDATE attached Board of Directors schedule including **Title/Position, Weekly Hours**.
  - a. Were any Officers or Board members compensated?
  - b. If a family relationship exists between any board members please provide explanation.
  - c. If business activity or receivables/payables exists between organization and Board members, employees or families of such please provide explanation.
17. If the organization received GRANTS and/or CONTRIBUTIONS in excess of \$5,000 from any one Grantor or Donor, provide **name, address, amount, and whether Grantor or Donor requests anonymity**.
18. ASSETS -
  - a. Did the organization purchase assets over \$2,500 (or per your capitalization policy) **Y/N**
  - b. If yes, provide a list with (1) **description** (2) **date** purchased and (3) **cost** of new asset(s).
  - c. Review enclosed **Future Depreciation Report** and note **date** disposed and **sale price** of any assets no longer in service or sold.