

CLIENT DOCUMENTS CHECKLIST

- IRS 501(c)(3) letter of determination
- Most recent income and expense statement
- Latest operating budget
- Latest financial audit
- Latest 990
- Mission statement, goals and objectives, brief history and geographic area(s) served
- Board of Directors, names and affiliations
- Dun & Bradstreet number
- Strategic plan/annual report
- Organization letterhead
- Other sources of income/donations and amount contributed by each
- Names and titles of employees
- Volunteers—numbers and roles
- Previous grants received, amount funded and project description
- By-laws