

## YOUR ANNUAL REPORTING CHECKLIST

About 15 minutes a year. Print this. Stick it on the fridge. Cross items off as you go.

WHO FILES

CHAPTERS UNDER \$50K

WHEN

BY MAY 15

TIME

~10 MINUTES

COST

\$0 — FREE

### FEDERAL — IRS FORM 990-N (E-POSTCARD)

- Confirm gross receipts were \$50,000 or less for the fiscal year**  
If you went over \$50K, you need Form 990-EZ instead — see the IRS 990-EZ instructions.
- Locate your chapter's EIN (federal tax ID)**  
Lost? See [irs.gov/businesses/employer-identification-number](https://irs.gov/businesses/employer-identification-number)
- File Form 990-N at [sa.www4.irs.gov/epostcard](https://sa.www4.irs.gov/epostcard)**  
Due by the 15th day of the 5th month after fiscal year-end (May 15 for calendar-year chapters).
- Save the IRS confirmation email in your chapter's records**  
This is your proof of filing. Print it or store it in a chapter Drive folder.

### STATE — YOUR CHAPTER'S STATE OF INCORPORATION

- File your state's annual nonprofit corporation report**  
Filed with the Secretary of State. Look up your state's link at [cgtle.org/chapters](https://cgtle.org/chapters).
- Renew your state's charitable solicitation registration**  
Filed with the Attorney General or state regulator. Required to legally ask for donations.

### RECORDS TO KEEP ON FILE

- Bank statements for the full fiscal year**
- Donor thank-you letters for any gift of \$250 or more**  
Donors need these to claim their tax deduction.
- Minutes from your annual chapter board meeting**
- Save state filing receipts & confirmations**

**MARK YOUR CALENDAR:** Federal 990-N due **May 15** · State deadlines vary — check your state

**Each CGTLE chapter is its own 501(c)(3)** — independent from CGTLE national. You're responsible for your chapter's filings. Need help? Call the IRS Tax Exempt help line: **877-829-5500** (Mon–Fri).