

Nonprofit Form 990 Records Checklist

Gather governance, program, revenue, expense, compensation, donor, grant, and related-party records for a nonprofit filing conversation.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

- 01 Organization and governance
- 02 Programs and accomplishments
- 03 Revenue and support
- 04 Expenses and compensation
- 05 Disclosures and related parties

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Nonprofit Form 990 Records Checklist

Record what is known, identify the source, assign an owner, and make missing information visible.

Organization and governance

Purpose / facts / owner / evidence / date:

Programs and accomplishments

Purpose / facts / owner / evidence / date:

Revenue and support

Purpose / facts / owner / evidence / date:

Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Expenses and compensation

Purpose / facts / owner / evidence / date:

Disclosures and related parties

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Nonprofit Form 990 Records Checklist

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