

Supporting Documentation for Tax Preparation

This document provides a comprehensive list of supporting documents that may be required for the preparation of your personal and business entity tax returns. Additional documentation may be requested based on your individual circumstances.

Nonprofit Tax Returns (Form 990, 990EZ, 990N, 990PF)

Financial Statements:

- Balance sheets, income statements, etc.

Investment Documentation:

- Brokerage statements detailing investment transactions (stocks, bonds, options, etc.).

Financial Account Documentation:

- Fiscal year-end bank account and credit card statements.
- Real Estate Documentation:
 - Copies of closing statements regarding the sale or purchase of real property.
 - Contribution details to support the Public Support information (Schedule A) in the Forms 990 for the four prior years, if necessary

Tax Authority Correspondence:

- Any tax notices sent to you by the IRS or other taxing authority.

If this is the first Nonprofit Return that you're preparing with Anderson, AND Anderson did not create your nonprofit, ALSO provide:

- Prior year's tax return
- IRS notification of exempt status (determination letter)
- Application for exemption (Form 1023 or 1024)
- Articles of incorporation/formation (initial and amended, if any) and bylaws
- Indicate the Organization's state of legal domicile
- Type of entity, such as corporation, trust, etc.
- Website address
- Copy of the Organization's mission as articulated in the Organization's governing documents and as approved by the governing body
- Description of the Organization's mission or its most significant achievement, whichever the Organization wishes to highlight (attach a separate narrative, if necessary)

Please ensure all documents are legible and complete. If you have any questions regarding the required documentation, please contact us at mytaxteam@andersonadvisors.com or at **702-628-5236**.