

## Dear Valued Client,

This Tax Organizer is designed to help you gather the tax information needed for Anderson to prepare your tax return for 2023. Please fill the tax organizer to the best of your ability. Enter all 2023 information for which you do not have official documentation.

**Note: To ensure your privacy, please do not submit your Tax Organizer or supporting documents via email.**

## Complete the Tax Organizer

- Enter all 2023 information. If any information does not apply to you or is incorrect, please draw a line through it or make necessary changes.

## Gather your supporting documents and make copies

- See the list below for examples.
- Send the copies with your completed organizer and keep the originals.

## Submit the Tax Organizer and any supporting documentation:

- Step 1: Upload to the viewable client docs folder in your Box account <https://andersonadvisors.app.box.com/>
- Step 2: Email [taxcoordinators@andersonadvisors.com](mailto:taxcoordinators@andersonadvisors.com) to let us know you have uploaded the organizer.

### The following are examples of supporting documentation:

- Financial statements including but not limited to Profit & Loss statement, a Balance Sheet, and General Ledger Detail Report.
- Annual Payroll Reports & Quarterly Employment Tax Forms (Form W-3, W-2, Form 940, Form 941, and State Unemployment Forms)
- Copies of all Forms 1099, 1099-B, Schedule K-1 received by the corporation.
- Copies of all Forms 1099s issued by the Organization.
- Brokerage statements showing investment transactions for sale of stocks, bonds, mutual funds and other securities.
- Year-end bank account and credit card statements.
- Copies of Form(s) 1099-S & closing statements HUD-1 for all purchases, sales, and refinancing of real property
- Depreciation schedules, if applicable.
- Any tax notices sent to you by the IRS or other taxing authority
- A copy of your Organization's tax return from last year, if not prepared by Anderson.

## FEE SCHEDULE FOR TAX RETURNS PREPARED IN 2023

Tax returns are billed by the hour for their preparation and review. Billable rates are:

- Tax Preparer \$275/hour
- Tax Reviewer \$475/hour

---

The minimum fee for a 990-N tax return is \$275 (\$495 with a state), \$1,100 for a 990-EZ, \$1,650 for a 990 or \$2,200 for a 990-PF. Starting in 2023, you must be a Tax Advantage Program client or on an annual flat rate fee to have the Anderson tax department prepare your return(s). Since our preparation fees are based upon the amount of time required to prepare your tax return, your fee may exceed the minimums. This does not apply to clients who have established flat rates for tax preparation. Anderson prepares tax returns on a first-in, first-out basis. That is, they are prepared in the order they are received. We do work with affiliated CPA firms to complete returns and reviews, so if you are facing an urgent timeline, we may be able to expedite return preparation and review through an affiliate. Please contact your Client Tax Coordinator to discuss your specific situation.

---

Flat Rate and Tax Advantage clients will be able to submit their tax organizers starting January 1st.

In order to make the filing deadline for your 2023 income tax return, your completed organizer and backup documents should be received by our office no later than the Anderson deadline to receive materials date listed on the Due Date Calendar attached to avoid any expedite fees. Any information received after that date may require an extension to be filed for your return. Based on the complexity of your return, an extension may still need to be filed. Anderson will file your extension when necessary. An extension provides additional time to file but does not provide additional time to pay any tax that may be due. You are responsible for paying any tax due to the IRS by the due date in order to avoid certain late penalties and interest even if an extension has been or will be filed.

---

Your Client Tax Coordinator is available to assist should you have any questions regarding the Tax Organizer, uploading information to Box, or the preparation process.

Contact us at 702-628-5236 or via email: [tax\\_coordinators@andersonadvisors.com](mailto:tax_coordinators@andersonadvisors.com) for more assistance.

Sincerely,

Anderson Advisors Tax Team

*The IRS does not send out unsolicited e-mails nor make unsolicited phone calls requesting or demanding personal information or immediate payment. Such authentic looking e-mails are called "phishing" emails and responding may expose you to identity theft. If you receive such emails, forward a copy to the IRS at [phishing@irs.gov](mailto:phishing@irs.gov). Please do not respond to the email. You may also contact our office regarding any written or electronic correspondence or phone calls that you receive from the IRS.*

# 2023 Tax Organizer for Tax Exempt Organizations 990 Returns

**Nevada**

3225 McLeod Drive  
Las Vegas, NV 89121  
Fax: 702.664.0545

**Washington**

732 Broadway, Suite 201  
Tacoma, WA 98402  
Fax: 253.238.0003

**Wyoming**

1718 Capitol Avenue  
Cheyenne, WY, 82001

800.706.4741

[www.AndersonAdvisors.com](http://www.AndersonAdvisors.com)

**USE THIS ORGANIZER FOR TAX EXEMPT ORGANIZATIONS (NONPROFITS)**

**IMPORTANT**

We are not able to complete your tax return until we have received the completed Tax Organizer and all required documentation, including but not limited to the Client Statement and payment information.

Anderson Business Advisors

3225 McLeod Drive, Suite 100

Las Vegas, NV 89121

Toll Free: 800.706.4741

or Call our Tax Department direct: 702-628-5236

Fax: 702.664.0547

E-mail: [taxcoordinators@andersonadvisors.com](mailto:taxcoordinators@andersonadvisors.com)

Secure Online Upload Page: <https://andersonadvisors.com/upload-documents/>

# Fax Cover Page

---

**ATTENTION: TAX PREPARATION DEPARTMENT**

To: Anderson Business Advisors: 702.664.0545

Attention:

From:

Date:

Total Number of Pages: (including cover page)

**THIS FAX INCLUDES THE FOLLOWING (CHECK ALL THAT APPLY)**

- Client Statement
- Engagement Objectives and Scope
- Organizer for (Entity Name: )
- Supporting Documents
- Other

**You may also upload all documents securely online at: [andersonadvisors.com/upload-documents/](https://andersonadvisors.com/upload-documents/)**

## CLIENT STATEMENT

Anderson Business Advisors' Tax Department will start accepting Tax Organizers to prepare 2023 tax returns starting January 15th, 2024. Please complete the Tax Organizer to the best of your ability.

Tax returns are prepared in the order received. In order to make the IRS filing deadline for your 2023 income tax return, your completed tax organizer and backup documents must be received by Anderson no later than the Anderson Deadline to Receive Materials date listed on the Tax Return Due Date Calendar provided with this organizer.

Returns with organizers and documents submitted after Anderson's deadline to receive materials and filed by the IRS deadline may be subject to expedite fee of \$300.

Anderson Business Advisors reserves the right to complete work domestically and globally through Anderson Global Group, affiliated CPA firms such as H&CO, LLP as well as other qualified professionals in order to timely complete tax preparation and review services.

**If your Tax Organizer and documents are received 10 weeks prior to the tax deadline, we cannot guarantee the return will be timely filed. This may result in the need to file an extension, when possible.**

An extension provides an additional time to file but does NOT provide an additional time to pay any tax that may be due. You are responsible for paying any tax liabilities due to the IRS and other taxing authorities (if applicable) BY the original due date of the return in order to avoid certain late penalties and interest even if an extension has been filed or will be filed.

The scope of work in connection with the preparation of your ("the Client") federal and state tax returns is intended to be in compliance with the requirements issued by the various taxing authorities. Because tax laws are not always clear, honest differences of opinion may arise between our interpretation of laws and that of the various taxing authorities. We will assist you in resolving these differences in your favor whenever possible.

You and/or your duly appointed representative agree not to hold Anderson Business Advisors ("Anderson"), its representative, or its affiliated firms liable for interpretations made with regard to any of the information supplied by Client and used in the preparation of the tax returns.

Unless compelled to do so by law, Anderson does not disclose any irregularities or provide statements as to the validity of the information supplied by Client to any taxing authority.

All tax returns are subject to review and acceptance by the various taxing authorities. In the event of an examination by the IRS or other taxing authority, contact Anderson. We can respond or represent your position to the taxing authority; however, there may be a fee for this service. You may appeal any adjustments proposed by a taxing authority.

**Please review your completed tax returns carefully.** As preparers, we have a responsibility both to the various taxing authorities with whom we file tax returns as well as to our Clients. You remain liable for the contents of your tax returns prepared by Anderson from the data you provide.

All tax return preparation fees must be paid before the tax return can be electronically submitted to the taxing authority. Once payment is received and the proper forms are signed authorizing Anderson to electronically file the tax return, Anderson will then electronically file the tax return.

By signing this document I acknowledge this statement and the dates below.

Signature:

Name on Credit Card:

Last 4 digits of Credit Card being used (if Tax Package is not used):

*If you wish to use a credit card that is not on file with Anderson, please contact your Client Tax Coordinator. By submitting this form, you are authorizing Anderson Business Advisors to send you an invoice electronically upon completion (via email or Box.com) and to charge the credit card provided above five (5) days after the invoice has been submitted to you.*

## ENGAGEMENT OBJECTIVES AND SCOPE

**Dear Valued Client,**

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2023 federal and requested state income tax returns from information that you furnish us. We do not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms assists in keeping pertinent information from being overlooked.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us. Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, such as gift and/or property, please inform us by noting so just below your signature at the end of the returned copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Sincerely,

Anderson Business Advisors Tax Team

Accepted By (Print Name):

Signature:

Date:

## PRIVACY POLICY

Certified Public Accountants (CPAs), like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

### **TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT**

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization.

### **PARTIES TO WHOM WE DISCLOSE INFORMATION**

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, our affiliated CPA firms we utilize to assist in the completion and/or review of tax returns and, in limited circumstances, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

### **PROTECTING THE CONFIDENTIALITY AND SECURITY OF CURRENT AND FORMER CLIENTS' INFORMATION**

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

---

*Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.*

Organization Name:	FEIN (Federal Employer Identification Number):
Mailing Address:	
Phone Number:	Website:
Tax Year Ending:	State(s) incorporated or operating in:
Contact Person:	Email Address:

This organizer is designed to assist you in gathering the information needed to prepare the Organization’s current year tax returns. Complete the organizer and answer all applicable questions.

**990N Qualification - please answer the following:**

- | 1. The annual gross receipts, including non-cash donations, averaged \$50,000 or less per year over the last 3 years <i>(Please complete question 5 to assist with this question)</i> _____ | <table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <th style="font-size: 8px;">TRUE</th> <th style="font-size: 8px;">FALSE</th> </tr> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table> | TRUE | FALSE |  |  |
|---|--|------|-------|--|--|
| TRUE  | FALSE  |      |       |  |  |
|   |  |      |       |  |  |
| 2. No political activities were carried on by the organization. _____   | <table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>   |      |       |  |  |
|   |  |      |       |  |  |
| 3. The organization had no Unrelated Business Income _____  | <table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>   |      |       |  |  |
|   |  |      |       |  |  |
| 4. The organization is not a <b>private foundation</b> , or section 509(a)(3), 501(c)(1), 501(c)(20), 501(c)(23), 501(c)(24), 501(d), 527, 529, 4947(a)(2), or 4947(a)(1). _____            | <table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>   |      |       |  |  |
|   |  |      |       |  |  |

**If any of the responses above is FALSE, the organization does not qualify to file a 990N and you should complete the rest of this organizer. If the responses are all true and you qualify to file a 990N, please complete questions 5 and 6 and then you can stop.**

5. The amount of gross receipts received in 2023 (estimate if necessary)

GROSS RECEIPTS	Amount
Cash Donations	
Non-cash Donations (i.e real estate, securities)	
Gross Rental Income	
Gross Investment Income	
Program Revenue	
Other Receipts	
Estimated Amount of Gross Receipts in 2021 & 2022	

6. Value of Organization assets at 12/31/2023 (estimate if necessary)

ORGANIZATION ASSETS	Amount
Cash In Bank	
Real Estate	
Securities	
Other	

**Note: Please provide copies of any 12/31/2023 investment or bank statements.**

Comments:



7. Please provide the following:

	YES/DONE	NO
A General ledger or trial balance		
B Balance Sheet & Statement of Activities (profit or loss)		
C Any correspondence received from the IRS or state tax authority		
D Any schedule K-1's or 1099's received by the organization		
E Bank, Investment and credit card account statements at 12/31/2023		
F Copies of 1099's or W2's issued by the organization		

8. Please provide the following (**first-year clients only whose nonprofit was not set up by Anderson**):

	YES/DONE	NO
A Tax returns for the three prior years		
B IRS notification of exempt status (determination letter)		
C Application for exemption (Form 1023 or 1024)		
D Articles of incorporation/formation (initial and amended, if any) and Bylaws		
E Indicate the Organization's state of legal domicile		
F Type of entity, such as corporation, trust		

Description of the Organization's mission or its most significant achievement, whichever the Organization wishes to highlight (attach a separate narrative, if necessary):

G

9. If you are not providing financial statements, please list the Organization's expenses and liabilities below.

Expenses	2023 Amount	Expenses Continued	2023 Amount
Grants/Assistance to organizations/individuals		Mortgage Interest	
Compensation		Utilities	
Legal and Accounting		Travel	
Office expense		Conference/Meetings	
State fees		Insurance	
Bank fees		Interest	
Information Technology		Other	
Rent		Other	

Liabilities	2023 Amount
Credit Cards Payable	
Mortgages/notes payable	
Officer payable	
Other	

10. Describe any change in or new activities not reported on a previously filed 990/990EZ:

--	--

11. Did the organization receive program revenue? If Yes, provide description and amount:

--	--

YES	NO

12. For each of the Organization's three largest program services (determined by the amount of expenses incurred), prepare a statement that fully describes the services provided (such as, the number of persons served, sessions held, research performed, and so on). Use specific measurements. This may be used on the 990 to share with the public the good that your nonprofit is accomplishing. Include as an attachment to this organizer.

YES	NO

13. Did the Organization receive contributions? If yes, provide a complete schedule of contributors and amounts contributed. Total contributions received:

--

YES	NO

14. Did the Organization receive Paycheck Protection Program (PPP) or EIDL funds related to Covid-19?

If Yes, provide the amount(s):

--

YES	NO

15. Did the Organization engage in any lobbying or any direct or indirect political campaign activities on behalf of, or in opposition to, candidates for public office?

YES	NO

16. Did the Organization receive or hold conservation easements?

YES	NO

17. Did the Organization hold, or receive any new collections, works of art, historical treasures or similar assets?:

YES	NO

18. Did the Organization serve as agent, custodian or trustee for other organizations?

YES	NO

19. Did the Organization have permanent or quasi endowment funds?

YES	NO

20. Did the Organization own any non-publicly traded investments?

YES	NO

21. Is the Organization a private school?

YES	NO

22. Did the Organization maintain an office, employees or agents or conduct activities of any kind (Including providing grants or assistance to any organization or individual) outside the U.S.?

YES	NO

23. Did the Organization pay more than \$15,000 for professional fundraising services?

YES	NO

24. Did the Organization raise more than \$15,000 from fundraising events or gaming activities including raffles?

YES	NO

25. Did the Organization make grants/donations of more than \$5,000 to any individuals, governments, or organizations in the U.S.?

If yes, please provide a schedule of those grants/donations

YES	NO

26. Did the Organization engage in or become aware of any previous excess benefit transaction with a disqualified person during the year?

YES	NO

27. Was a loan to or from a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the tax year? If yes, provide a schedule of those loans.

YES	NO

28. Did the Organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? If yes, provide a schedule of those grants or assistance.

YES	NO

29. During the tax year, did any person, or their family member, who is a current or former officer, director, trustee, or key employee:

A. Have a direct business relationship with the organization (other than as an officer, director, trustee or employee) or an indirect business relationship through ownership of more than 35% in another entity?

YES	NO

B. Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional organization) doing business with the organization?

YES	NO

30. Did the Organization receive more than \$25,000 in non-cash contributions such as real estate, stocks or equipment? If yes, provide a schedule of those contributions including who made the contribution(s) and what was received. Also provide any related form 8283.

YES	NO

31. Did the Organization liquidate or dissolve and cease operations, or sell, exchange or dispose of, or transfer more than 25% of its net assets?

YES	NO

32. Did the Organization hold, or receive any new collections, works of art, historical treasures or similar assets?

YES	NO

33. Did the Organization own 100% of a disregarded entity?

YES	NO

34. Is the Organization related to any tax-exempt or taxable entity (other than by association with a statewide or nationwide organization) through common membership, governing bodies, officers, etc.? If yes, provide a list of those entities.

YES	NO

35. A. Indicate the number reported in Box 3 of Form 1096, "Annual Summary and Transmittal of U.S. Information Returns" (1099s)

B. Indicate the number of Forms W-2G filed for the year

C. Did the Organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (raffle) winnings to winners?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

36. A. Indicate the number of employees reported on Form W-3, "Transmittal of Wage and Tax Statements", filed for the calendar year ending within the year covered by this return.

B. Did the Organization file all required federal employment tax returns?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

C. Estimate the number of volunteers who worked with the Organization during the year.

37. Did the Organization have gross receipts of \$1,000 or more from a trade or business not related to the organization's exempt purpose? If so, provide a schedule of the income and expense detail related to the activity.

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

38. At any time during the calendar year, did the Organization have an interest in or signature authority over, a financial account in a foreign country? If yes, the Organization may have to file Form TD F 90.22-1. This form must be filed by June 30 of each year (note: significant penalties for failure to file).

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

39. For organizations that receive contributions under IRC § 170(c):

A. Did the Organization provide written acknowledgment to donors of individual contributions of \$250 or more?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

B. Did the Organization provide goods or services in exchange for any contribution of \$75 or more?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

If yes, did the Organization notify the donor of the value of the goods or services provided to the donor?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

C. Did the Organization sell, exchange or otherwise dispose of tangible personal property for which it was required to file Form 8282?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

D. Did the Organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

E. For contributions of cars, boats, airplanes and other vehicles, did the organization file a Form 1098-C as required?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

40. Did any officer, director, trustee or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? If yes, describe how they're related.

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

41. Were any significant changes made to the organizing or governing documents since the prior Form 990 was filed? If yes, provide a complete copy of the revised documents and indicate the change(s).

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

42. Did the Organization become aware of a material diversion of the organization's assets?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

43. Did the Organization contemporaneously document all meetings held or written actions undertaken during the year by the governing body and each committee with authority to act on behalf of the governing body?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

44. Does the Organization have local chapters, branches or affiliates?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

45. Will a copy of the Form 990 be provided to the Organization's governing body before it is filed?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

46. Does the Organization have a conflict of interest policy?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

47. Does the Organization have a written whistle-blower policy?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

48. Does the Organization have a written document retention and destruction policy?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

49. Did the process for determining compensation of the Organization's CEO, Executive Director or other officers of the Organization include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

50. Did the Organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? If yes, has the Organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

51. Provide a list of the states where the organization owns or leases property, receives donations, has employees or sells goods or services.

52. State the name, physical address, and telephone number of the person who possesses the books and records of the Organization.

53. Did the Organization sell or dispose of any assets during the tax year?

YES	NO

If yes, provide the closing statement, investment gain/loss schedule or other supporting document.

54. Please list the 2022 board members' names, position and average hours/week devoted to nonprofit activities.

Name	Position	Hours/Week

**ADDITIONAL INFORMATION OR COMMENTS?**