

Tax Audit Preparation Checklist for Nonprofits

Date: [Insert Date]

To: [Nonprofit Organization Name]

From: [Your Name/Your Organization]

Subject: Tax Audit Preparation Checklist

Dear [Nonprofit Team/Specific Name],

As we prepare for the upcoming tax audit, please find below a checklist to ensure all necessary documentation and information are gathered:

Tax Audit Preparation Checklist

- **Financial Statements:** Gather the last three years of audited financial statements.
- **Books and Records:** Ensure all accounting records are up to date.
- **Bank Statements:** Collect all bank statements for the past year.
- **Form 990:** Compile the last three years of Form 990 filings.
- **Contributions:** Document all contributions received, including donor information.
- **Grant Agreements:** Review and organize any grant agreements or contracts.
- **Compliance Documentation:** Gather records of compliance with state and federal regulations.
- **Meeting Minutes:** Ensure all board meeting minutes are available and organized.
- **Expense Reports:** Collect documentation for all major expenses incurred.
- **Policy Manual:** Update and prepare the organization's policy manual.

Please ensure that all items are prepared by [Insert Deadline]. If you have any questions or need assistance, feel free to reach out.

Thank you for your cooperation.

Sincerely,

[Your Name]

[Your Title]

[Your Organization]

[Your Contact Information]