Nonprofit Assistance Intake Form

501(c)(3) preparation and organizational readiness | Crystal Hughes

Please complete this form before your consultation. Your answers help identify the documents, planning, and services your organization needs. Mark unknown items “Unsure” and attach extra pages when needed. Missing items help us define your next steps.

Assistance may include organizational setup, bylaws, board development, budgets, and application preparation. These services may require separate work and fees. Completing this form does not submit an IRS application or establish a service agreement.

Contact and organization

1. Your name, title, and authority to request assistance

2. Email and telephone number

3. Do you have an organization name? List the legal or proposed name and any other names used.

4. Organization mailing address, city, state, ZIP code, and county

5. Physical operating address, if different; website or social media, if available

6. Which best describes your stage?

☐ Exploring an idea ☐ Operating without IRS recognition ☐ Application pending
☐ Already recognized ☐ Previously revoked or denied ☐ Unsure

7. How long have you considered forming a nonprofit? If recognized, when was 501(c)(3) status granted?

8. What help do you need, and is there a deadline or reason for urgency?

Formation and application history

9. Has the organization been legally formed? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

Entity type, formation date, state, registration number, and current state status

10. Do you have filed articles of incorporation or another organizing document? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

☐ Filed copy available ☐ Draft only ☐ Need preparation ☐ Need review

11. Does the organizing document address charitable purposes and distribution of assets upon dissolution? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

12. Do you have an EIN and the IRS EIN confirmation letter? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

☐ Letter available ☐ EIN issued but letter missing ☐ Need EIN assistance

Provide the EIN confirmation securely during onboarding; do not include SSNs or passwords here.

13. Have you adopted bylaws? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

☐ Adopted copy available ☐ Draft only ☐ Need preparation ☐ Need review

14. Has an exemption application ever been filed for this organization? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

If yes: form used, filing date, outcome, who prepared it, and any pending IRS response deadline

15. Has status ever been denied, revoked, or voluntarily ended? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

If yes, explain dates, reason if known, and whether reinstatement has been requested.

16. Is this organization a successor to, conversion of, or connected to another organization or business? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

If yes, explain the relationship and any transfer of programs, funds, or property.

17. Organization type or special activities: for example church, school, housing, scholarships, health services, international work, or fiscal sponsorship

Application type and eligibility will be evaluated after review. An EIN or state nonprofit filing by itself does not establish federal 501(c)(3) recognition.

Board and governance

18. Have you selected board members, and have they agreed to serve? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

List all current or proposed directors and officers. Attach more rows if needed. Use business contact information.

Full name	Title or role	Email or phone	Accepted or proposed

19. Are any board members related by family or business relationships? Identify the people and relationship.

20. Has the board held an organizational meeting and kept signed minutes or resolutions? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

21. How often will the board meet, and who will keep minutes and organizational records?

22. Do you have a conflict of interest policy and a process for reviewing related party transactions? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

23. Will any founders, officers, board members, or related businesses receive pay, rent, contracts, loans, or other payments? Explain proposed amounts and approval process.

24. Who will manage daily operations, bookkeeping, and required filings? List staff, volunteers, or outside professionals.

Mission programs and service area

25. What is your mission, and what community need will your organization address?

26. Who will you serve? Include ages, populations, eligibility criteria, and how participants will be selected.

27. Where are you based, and which states, counties, cities, or countries will you serve?

28. Are you already doing this work without recognized 501(c)(3) status? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

If yes, when did you start? Describe activities completed, people served, and available records or results.

29. Describe each planned program: what you will do, where and how often, who will deliver it, and the expected launch date.

30. Will services be free or fee based? List fees, scholarships, and how assistance will be awarded.

31. What facilities, partners, staff, volunteers, equipment, licenses, or insurance do you have or still need?

32. How will you track participation, spending, and results?

Budget and funding plans

33. Do you have a written operating budget? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

☐ Board approved ☐ Draft ☐ Need preparation ☐ Need review

34. Budget period: Total annual income: $ Total annual expenses: $
Current cash: $ Total assets: $ Debts or obligations: $

35. What are your main program costs, staffing costs, and administrative expenses? Include estimated amounts.

36. What income have you received so far, and from which sources? Include donations, program fees, grants, and founder contributions. Identify the year and whether amounts are actual or projected.

37. How will you fund the next three years? Provide annual income and expense estimates or attach projections.

38. Does the organization have its own bank account and bookkeeping system? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

If yes, who maintains the records? Do not provide account numbers or login credentials.

39. Have you applied for any grants? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

List funder, amount, submission date, outcome or pending status, and any reporting obligations.

40. Do you have grants in mind? ☐ Yes ☐ No ☐ Unsure ☐ Not applicable

List grant names or links, deadlines, amounts, and any eligibility requirements you have identified.

41. What is your available budget for organizational assistance? $
Have you separately set aside funds for government filing fees? ☐ Yes ☐ No ☐ Unsure

Grant eligibility varies by funder. IRS recognition does not guarantee grants, funding, or application approval.

Documents services and acknowledgment

42. For each item, mark A = available, D = draft, N = need help, or NA = not applicable. Supply available documents through the agreed submission method.

Filed organizing documents and amendments EIN confirmation letter
Bylaws Board roster Meeting minutes or resolutions
Conflict of interest policy Mission and program descriptions
Operating budget and projections Financial records or statements
Prior IRS application and correspondence IRS determination letter
State registration or good standing records Prior Form 990 series filings
Charitable solicitation registrations Grant applications or award letters

43. Are state reports, charitable solicitation registrations, or IRS annual filings current? List anything overdue, unknown, or requiring review.

44. Select the services you want evaluated.

☐ Readiness review ☐ Formation documents ☐ EIN assistance ☐ Bylaws
☐ Board setup and policies ☐ Budget preparation ☐ Program development
☐ Exemption application ☐ Reinstatement ☐ Ongoing filing guidance
☐ Grant readiness ☐ Other:

45. What else should we know, and what questions would you like addressed?

Client acknowledgment

Please check each statement before signing.

☐ I understand that building and maintaining a nonprofit involves organizational documents, governance, financial planning, records, and applicable ongoing filings. Requirements depend on the organization and jurisdiction.

☐ I understand that bylaws, budgets, formation, grant support, and ongoing compliance work may be separately scoped and priced. Government filing fees will be identified separately from service fees in the written agreement.

☐ I understand that submitting this intake does not create a service agreement or guarantee IRS approval, timing, or grant awards.

☐ I confirm that my answers are accurate to the best of my knowledge and that I am authorized to request assistance for this organization.

Name and title: Signature:
Date:

For consultant use: ☐ Ready for application review ☐ Preparation needed ☐ Further review needed
Missing items and next steps:
Proposed scope and separate fee quote:

Reference basis: IRS Instructions for Form 1023 and Form 1023-EZ.
irs.gov/pub/irs-pdf/i1023.pdf | irs.gov/pub/irs-pdf/i1023ez.pdf
This intake gathers information for review; it is not an IRS application.