

Annual Update Checklist



Welcome to the GivingMatters.com annual update checklist! The following steps will walk you through each profile tab to ensure all information is accurate and up to date.

Mandatory time-sensitive updates are emphasized in bold.

- 1: Basic Info**
- Contact Info
 - **Annual Budget**
 - Impact Statement

*Helpful Hint: **Annual Budget** = CFY Expenses in **Financials***

- 2: Governance**
- **Board Chair** & Co-Chair
 - Board Members & Demographic Info

- 3: Management
- Staff Info

- 4: Financials**
- **Form 990** (PDF format)
 - **Audit / Projected Budget** (PDF format)
 - **Current Fiscal Year** (CFY)

- 5: Receive Donations**
- **State Charitable Solicitations Permit**

*Helpful Hint: **Don't** upload Sales Tax Exemption Form*

- 6: Manage Programs
- Program Budget
 - Program Success Outcome Info