Annual Update Checklist

GIVING MATTERS

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 = **Current Fiscal Year Expenses** in Financials

2: Governance

- **Board Chair** & Co-Chair
- Board Members & Demographic Info

3: Management

- Staff Info

4: Financials
Format all uploads as **.PDF**

- **Form 990**
- **Projected Budget**
- Audit (if annual revenue over 1 million)
- **Current Fiscal Year**
- **State Charitable Solicitations Permit**

Don't upload Sales Tax Exemption Form

5: Manage Programs

- Program Budget
- Program Success Outcome Info