

# Non-Profit Organization

## REQUIRED DOCUMENT LIST

The following list is meant to serve as a guide when completing your application.

The SDO Certification Committee reserves the right to request additional information, if needed.

1. \_\_\_\_\_ List of all members of the board of directors/trustees, identify gender, ethnicity, term expiration date and total number of years served in the board.
  2. \_\_\_\_\_ IRS or IRS-interim tax-exempt certification letter for a 501 (c)(3) or 501 (c)(4) organization.
  3. \_\_\_\_\_ Complete copy of most recent "Form PC" filed with the Massachusetts Attorney General, Division of Public Charities.
  4. \_\_\_\_\_ Articles of organization, incorporation or association, with all amendments (where applicable).
  5. \_\_\_\_\_ By-laws, with all amendments (where applicable).
  6. \_\_\_\_\_ Minutes of the first organizational meeting, and all subsequent corporation meeting minutes that reflect any changes in the organization, etc.
  7. \_\_\_\_\_ Current Massachusetts Non-Profit Annual Report filled with the Secretary of the Commonwealth.
  8. \_\_\_\_\_ Current resumes of the Executive Director, Board of Directors/Trustees, Officers and key employees.
  9. \_\_\_\_\_ Current or proposed budget.
  10. \_\_\_\_\_ Last fiscal year financial statement showing assets, liabilities and equity. If the organization is less than one year old, please submit opening balance sheet for those months in operation.
  11. \_\_\_\_\_ Last fiscal year income statement showing all income and expense accounts. If the organization is less than one year old, please submit opening balance sheet for those months in operation.
  12. \_\_\_\_\_ Copy of bank signature card(s) or corporate resolution showing signatories for all business accounts.
  13. \_\_\_\_\_ Lease or rental agreement(s) for space for administrative office(s) and list of all other properties. If administrative facility(ies) is(are) owned, please attach a copy(ies) of a recent real estate tax bill.
  14. \_\_\_\_\_ Copies of five recent canceled checks (front and back) written for business purposes.
  15. \_\_\_\_\_ Three copies of contracts and/or invoices prepared for the organization that show the scope of service(s) performed and dollar amounts.
  16. \_\_\_\_\_ Professional licenses or permits used in the conduct of business, if any.
  17. \_\_\_\_\_ Original signed Request for Verification of Taxation Reporting Information (W-9) Form. Please go to [http://www.somwba.state.ma.us/Content/pdf/newMass\\_W9.pdf](http://www.somwba.state.ma.us/Content/pdf/newMass_W9.pdf) to download and print this document.
  18. \_\_\_\_\_ Original signed Commonwealth Terms and Conditions Form. Please go to [http://www.mass.gov/osc/Accountg/marmemos/comm\\_TermsConditions.pdf](http://www.mass.gov/osc/Accountg/marmemos/comm_TermsConditions.pdf) to download and print this document.
  19. \_\_\_\_\_ If bonded, please send the most recent copy of an original letter from your bonding agent confirming type of bonding, single and aggregate limits (if your company is in the construction industry), and provide name of the surety company. The surety company must be licensed to issue bonding in the Commonwealth of Massachusetts by the Division of Insurance and must be on the most recent list of approved sureties issued by the U.S. Department of Treasury.
  20. \_\_\_\_\_ Other \_\_\_\_\_
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