

## 2023 Tax Organizer Exempt Organization Information

### General Information

Organization name				EIN	
Doing business as					
Street address, city, state, and ZIP					
Email address					
Phone number		Cell number		Fax number	

**Yes No**

Does the organization file under a calendar year?  
 If "No," what is the tax year begin date? \_\_\_\_\_ Tax year end date? \_\_\_\_\_

The organization is exempt under section:  
 501 ( ) ( )     408(e)     408A     529(a)     220(e)     530(a)     529A

If the organization is filing a group return or if the organization is a central / subordinate organization in a group exemption and is filing a separate return, what is the group exemption number? \_\_\_\_\_

What type of entity is the organization?  
 Corporation     Trust     Association     Other trust     State college / university

Is the organization a 501(c)(3) organization filing a consolidated return with a 501(c)(2) titleholding corporation?

Did the organization have any unrelated trades or businesses?  
 If "Yes," how many? \_\_\_\_\_

During the tax year, was the corporation a subsidiary in an affiliated group or a parent-subsidary controlled group?  
 If "Yes," provide the following information for the parent corporation  
 Employer ID number (EIN) \_\_\_\_\_  
 Name of parent corporation \_\_\_\_\_

Provide the name and phone number of the person who has the organization's books and records.

Name \_\_\_\_\_  
 Phone number \_\_\_\_\_

### Estimates

	Federal		Resident State	
	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2022	_____	_____	_____	_____
First quarter	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____

### Account Information for Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account	
			Checking	Savings

2023

Schedule A - Parts I & II

Organization Name:

EIN:

Part I - Unrelated Trade or Business Income

Activity Description	2023
Gross receipts or sales . . . . .	_____
Nonaccrual experience method - amounts not accrued . . . . .	_____
Returns and allowances . . . . .	_____
Other income (list) . . . . .	_____
_____	_____
_____	_____
_____	_____
_____	_____

Part II - Deductions Not Taken Elsewhere

2023

Salaries and wages . . . . .	_____
Repairs and maintenance . . . . .	_____
Bad debts . . . . .	_____
Interest expense . . . . .	_____
Taxes and licenses . . . . .	_____
Depletion . . . . .	_____
Contributions to deferred compensation plans . . . . .	_____
Employee benefit programs . . . . .	_____
Other deductions (list) . . . . .	_____
_____	_____
_____	_____
_____	_____
_____	_____
Net operating loss arising on or after January 1, 2018 . . . . .	_____

2023

Schedule A - Part III

Organization Name:

EIN:

Part III - Cost of Goods Sold

Activity Description \_\_\_\_\_

Inventory method:  Cost  Lower of cost or market

Other \_\_\_\_\_

2023

Inventory at the beginning of the year	.....	_____
Purchases	.....	_____
Cost of labor	.....	_____
Additional section 263A costs	.....	_____
Other costs (list):	.....	_____
	.....	_____
	.....	_____
Inventory at the end of the year	.....	_____



2023

Schedule A - Parts IV & Part V

EIN:

Organization Name:

Part IV - Rent Income

Activity description
Description of property
Address
City State ZIP
Foreign province / state Country Postal code
2023

Rent received from personal property
Rent received from real and personal property
Deductions directly connected with the income entered above

Part V - Unrelated Debt-Financed Income

Description of debt-financed property
Address
City State ZIP
Foreign province / state Country Postal code
2023

Gross income from, or allocable to, debt-financed property
Deductions directly connected with, or allocable to, debt-financed property:
Straight-line depreciation
Other deductions
Amount of monthly average acquisition indebtedness
Percentage allocable to debt financed income
Adjusted basis on the first day of the tax year
Adjusted basis on the last day of the tax year
Average adjusted basis
Percentage allocable to debt financed income

2023

Schedule A - Parts VI & VII

Organization Name:

EIN:

Part VI - Interest, Annuities, Royalties, and Rents from Controlled Organizations

Activity description
Name of controlled organization
EIN 2023

Exempt Controlled Organizations:

Net unrelated income (loss)
Total of specified payments made
Specified payments entered on the previous line that are included in the organization's gross income
Deductions directly connected with income entered on the previous line

Nonexempt Controlled Organizations:

Taxable income
Net unrelated income (loss)
Total of specified payments made
Specified payments entered on the previous line that are included in the organization's gross income
Deductions directly connected with income entered on the previous line

Part VII - Investment Income of a Section 501(c)(7), (9), or (17) Organization

Description of income
Amount of income
Deductions directly connected to the investment income
Set-assets for:
Charitable purposes
Directly connected reasonable administrative costs for charitable purposes
Payment of life, sick, accident, or other benefits by VEBA or SUB
Directly connected reasonable administrative costs for payments by VEBA or SUB

2023

Schedule A - Part VIII, IX, and X

Organization Name: \_\_\_\_\_

EIN: \_\_\_\_\_

**Part VIII - Exploited Exempt Activity Income, Other Than Advertising Income**

Activity Description \_\_\_\_\_

Description of exploited activity \_\_\_\_\_ **2023**

Gross unrelated business income from trade or business . . . . . \_\_\_\_\_

Expenses directly connected with production or unrelated business income . . . . . \_\_\_\_\_

Gross income from activity that is not unrelated business income . . . . . \_\_\_\_\_

Expenses attributable to gross income from activity that is not unrelated business income . . . . . \_\_\_\_\_

**Part IX - Advertising Income**

**Income From Periodicals Reported on a Consolidate Basis**

Name of periodical \_\_\_\_\_

Consolidated number (used to group consolidated periodicals together) \_\_\_\_\_ **2023**

Gross advertising income . . . . . \_\_\_\_\_

Direct advertising costs . . . . . \_\_\_\_\_

Advertising is not on a regular and continual basis

Circulation income . . . . . \_\_\_\_\_

Readership costs . . . . . \_\_\_\_\_

**Income From Periodicals Reported on a Separate Basis**

Name of periodical \_\_\_\_\_

Gross advertising income . . . . . \_\_\_\_\_

Direct advertising cost . . . . . \_\_\_\_\_

Advertising is not on a regular and continual basis

Circulation income . . . . . \_\_\_\_\_

Readership costs . . . . . \_\_\_\_\_

**Part X - Compensation of Officers, Directors, and Trustees**

Name \_\_\_\_\_

Title \_\_\_\_\_ **2023**

Percent of time devoted to business . . . . . \_\_\_\_\_

Compensation attributable to unrelated business . . . . . \_\_\_\_\_





