LAZARUS CORPORATE FILING SERVICE

Serving Miami Since 1979

FORM 1023-EZ | CLIENT ELIGIBILITY CHECKLIST

Organization: _____ Date: _____

Check YES, NO, or UNSURE for each question. This is a preliminary screening tool, not the official IRS eligibility worksheet.

FINANCIAL REQUIREMENTS

Gross receipts were $50,000 or less in each of the past three years (if in existence that long).	[ ] Yes [ ] No [ ] Unsure
Projected gross receipts are $50,000 or less in each of the current year and next two years.	[ ] Yes [ ] No [ ] Unsure
Total assets have a fair market value of $250,000 or less.	[ ] Yes [ ] No [ ] Unsure

ORGANIZATION & PURPOSE

Organization was formed in the United States and has a U.S. mailing address.	[ ] Yes [ ] No [ ] Unsure
Organization is a qualifying nonprofit corporation, unincorporated association, or trust (not an LLC).	[ ] Yes [ ] No [ ] Unsure
Organization is organized and operated exclusively for qualifying 501(c)(3) purposes.	[ ] Yes [ ] No [ ] Unsure
Organizing documents include required 501(c)(3) purpose and dissolution provisions.	[ ] Yes [ ] No [ ] Unsure

SPECIAL ELIGIBILITY SCREENING

Organization is NOT a church, school, college, university, or hospital.	[ ] Yes [ ] No [ ] Unsure
Organization is NOT a supporting organization or private operating foundation.	[ ] Yes [ ] No [ ] Unsure
Organization is NOT in a special category excluded from 1023-EZ (for example, certain insurance, disaster-relief, or other specialized entities).	[ ] Yes [ ] No [ ] Unsure
Organization has reviewed any predecessor organization, prior IRS determination, revocation, or reinstatement issues.	[ ] Yes [ ] No [ ] Unsure

DOCUMENTS / INFORMATION TO HAVE READY

[ ] EIN [ ] Articles of incorporation / organizing documents [ ] Mission & activities
[ ] Officers/directors [ ] Revenue projections & asset values [ ] Prior IRS letters (if any)

Important: A NO or UNSURE response requires further review. Some special-category questions are worded so that YES is favorable. The complete IRS Form 1023-EZ Eligibility Worksheet in the current instructions must be completed before filing. IRS approval is not guaranteed.

Official IRS instructions: https://www.irs.gov/instructions/i1023ez