

01

FILE SECRETARY OF STATE ANNUAL REPORT

Form: Annual Report

Due: Anniversary month of Incorporation

Purpose: Keeps the nonprofit in good standing with the state; updates registered agent, address, or directors.

02

FILE IRS ANNUAL RETURN (FORM 990)

Form: 990, 990-EZ, or 990-N (e-Postcard) depending on revenue

Due: 4.5 months after the fiscal year ends (e.g., May 15 for calendar year nonprofits)

Purpose: Maintains federal tax-exempt status; reports revenue, expenses, and key activities.

03

FILE CHARITABLE ORGANIZATION ANNUAL RENEWAL

Form: AG990-IL (For Illinois)

Due: Along with IRS filing

Purpose: Updates the Illinois Attorney General on fundraising activities and financials; required to continue soliciting donations in Illinois.

04

MAINTAIN CORPORATE GOVERNANCE RECORDS

Form: None

Due: Ongoing; review at least once per year

Purpose: Hold an annual board meeting, approve financials, document meeting minutes, and review policies to demonstrate accountability and compliance.

05

UPDATE ILLINOIS SALES TAX EXEMPTION (IF APPLICABLE)

Form: STAX-1 update (if any changes occur)

Due: As needed

Purpose: Ensures your organization maintains its eligibility for state sales tax exemptions and avoids penalties.