

10. Please indicate that your organizing documents contain the following which is required for section 501(c)(3) by checking the boxes below to attest that:

Your organizing document limits your purposes to one or more exempt purposes within section 501(c)(3)

Your organizing document does not expressly empower you to engage, otherwise than as an insubstantial part of its activities, in activities that in themselves are not in furtherance of one or more exempt purposes.

Your organizing document contains the dissolution provision required under section 501(c)(3) or that you do not need to express dissolution provision in your organizing document because you rely on the operation of state law in the state in which you are formed for your dissolution provision (depending on your entity type and the state in which you are formed, this requirement may be satisfied by operation of state law).

11. Enter the appropriate 3-character NTEE code that best describes your activities _____

12. To qualify for exemption as a section 501(c)(3) organization, you must be organized and operated exclusively to further one or more of the following purposes. **Check all that apply:**

Charitable Religious Educational Scientific Literary

Testing for public safety Prevention of cruelty to children or animals

13. To qualify for exemption as a section 501(c)(3) organization, you must:

- Refrain from supporting or opposing candidates in political campaigns in any way.
- Ensure that your net earnings do not inure in whole or in part to the benefit of private shareholders or individuals (that is, board members, officers, key management employees, or other insiders).
- Not further non-exempt purposes (such as purposes that benefit private interests) more than insubstantially.
- Not be organized or operated for the primary purposes of conducting a trade or business that is not related to your exempt purpose(s).
- Not devote more than an insubstantial part of your activities attempting to influence legislation or, if you made a section 501(h) election, not normally make expenditures in excess of expenditure limitations outlined in section 501(h).
- Not provide commercial-type insurance as a substantial part of your activities.

Check here to attest that you have not conducted and will not conduct activities that violate these prohibitions and restrictions.

14. Do you or will you attempt to influence legislation? yes no (If yes, consider filing IRS form 5768.)

15. Do you or will you pay compensation to any of your officers, directors or trustees? yes no

16. Do you or will you donate funds to or pay expenses for individual(s)? yes no

17. Do you or will you conduct activities or provide grants or other assistance to individual(s) or organization(s) outside the United States? yes no

18. Do you or will you engage in financial transactions (for example, loans, payments, rents, etc.) with any of your officers, directors, or trustees, or any entities they own or control? yes no

19. Do you or will you have unrelated business gross income of \$1,000 or more during a tax year?
 yes no

20. Do you or will you operate bingo or other gaming activities? yes no

21. Do you or will you provide disaster relief? yes no

22. The following questions are designed to classify you as an organization that is either a private foundation or a public charity. Public charity status is a more favorable tax status than private foundation status.

If you qualify for public charity status, check the appropriate box below or **if you are a private foundation skip to section B:**

- A.** i. You normally receive at least one-third of your support from public sources or you normally receive at least 10 percent of your support from public sources and you have other characteristics of a publicly supported organization.
- ii. You normally receive more than one-third of your support from a combination of gifts, grants, contributions, membership fees, and gross receipts (from permitted sources) from activities related to your exempt functions and normally receive not more than one-third of your support from investment income and unrelated business taxable income.
- iii. You are operated for the benefit of a college or university that is owned or operated by a government unit.

OR

B. As a private foundation, you are required by section 508(e) to have specific provisions in your organizing document, unless you rely on the operation of state law in the state in which you were formed to meet these requirements. These specific provisions require that you operate to avoid liability for private foundation excise taxes under sections 4941-4945. By checking the box below, you attest that:

- Your organizing document contains the provisions required by section 508(e) or your organizing document does not need to include the provisions required by section 508(e) because you rely on the operation of state law in your particular state to meet the requirements of section 508(e).

23. Name and title of officer, director, trustee or other authorized official signing form 1023EZ:

NAME

TITLE

ADDRESS

I hereby authorize and give consent to BlumbergExcelsior Corporate Services, Inc. to prepare and file IRS Form 1023-EZ for the above named entity based on my responses to this questionnaire and the attached Form 1023-EZ Eligibility Worksheet.

Print Name

Date

Signature

Title