

Find E-file Info in a Paper 1023

Do you have a completed (or partially completed) paper Form 1023 that you can use to help you complete the new Electronic Form 1023? This chart may help you find the information in the old form that you need to fill out the new form.

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Electronic 1023		2017 Form 1023		Information
Part I	1a	Part I	1	Name
Part I	1b	Part I	2	c/o Name
Part I	1c	Part I	3	Mailing Address
Part I	1d	Part I	3	City
Part I	1e	New		Country
Part I	1f	Part I	3	State
Part I	1g	Part I	3	Zip + 4
Part I	1h	New		Foreign Province
Part I	1i	New		Foreign Postal Code
Part I	2	Part I	4	Employer Identification Number
Part I	3	Part I	5	Month Tax Year Ends
Part I	4	Part I	6a	Person to Contact
Part I	5	Part I	6b	Contact Telephone Number
Part I	6	Part I	6c	Fax Number
Part I	7	Part XI		User Fee Submitted
Part I	8	Part I	9a	Organization's Website
Part I	9	Part V	1a	List Officers, Directors, etc.
Part II	1	Part II	1, 2, 3, 4a	Select your type of organization
Part II	2	Part I	11	Enter the date you formed
Part II	3	New		Select your state of formation
Part II	4	Part II	5	Have you adopted bylaws?
Part II	5	Part VII	1	Are you a successor to another organization?

Find E-file Info in a Paper 1023, page 2**~~ Where to find answers to E-file 1023 Questions in the 2017 Form 1023 ~~**

Electronic 1023		2017 Form 1023		Information
Part III	1	Part III	1	Limited purposes?
Part III	1a	Part III	1	Where in organizing document?
Part III	2	Part III	2a	Dissolution provision?
Part III	2a	Part III	2b, c	Where in organizing document?
Part IV	1	Part IV		Describe your activities completely and in detail
Part IV	2	New		Enter the NTEE Code for your activities.
Part IV	3	Part VI	2	Limit assistance to specific individual/group?
Part IV	4	Part VI	3	Assistance for family/for business associates?
Part IV	5	Part VIII	1	Support or oppose political candidates?
Part IV	6	Part VIII	2a	Attempt to influence legislation?
Part IV	6a	Part VIII	2b	Form 5768 election?
Part IV	7	Part VIII	10	Publishing? Intellectual property?
Part IV	8	New		Consumer credit counseling?
Part IV	9	Part VIII	13	Grants, loans, etc. to organizations?
Part IV	9a	New		To non (c)(3)s?
Part IV	9b	Part VIII	14a, b, c	Grants, loans, etc. to foreign organizations?
Part IV	9c	Part VIII	14d	Do donors know you have ultimate authority?
Part IV	9d	Part VIII	14e	Pre-grant inquiries about the recipients?
Part IV	9e	Part VIII	14f	Additional procedures?
Part IV	9f	Part VIII	15	Shared board members or key personnel?
Part IV	9g	New		Check the OFAC List?
Part IV	9h	New		Comply with OFAC sanctions?
Part IV	9i	New		Acquire OFAC license/registration?

Find E-file Info in a Paper 1023, page 3

~~ Where to find answers to E-file 1023 Questions in the 2017 Form 1023 ~~

Electronic 1023		2017 Form 1023		Information
Part IV	10	Part VIII	12a, b, c	Operate in a foreign country?
Part IV	10a	New		Check the OFAC List?
Part IV	10b	New		Comply with OFAC sanctions?
Part IV	10c	New		Acquire OFAC license/registration?
Part IV	11	Part VIII	4e	Donor Advised Funds?
Part IV	12	Part VIII	19	School?
Part IV	13	Part VIII	20	Hospital or medical care?
Part IV	14	Part VIII	21	Low-income Housing?
Part IV	15	Part VIII	22	Scholarships, fellowships, educational loans?
Part IV	16	Part VIII	4a	Fundraising
Part IV	17	Part VIII	20	Fundraising activities for other organizations?
Part V	1	Part V	1a, b, c	Compensate officers, directors, or trustees?
Part V	1a	Part V	4a	Follow a conflict of interest policy?
Part V	1b	Part V	4b	Approve arrangements in advance of paying?
Part V	1c	Part V	4c	Document date and terms in writing"
Part V	1d	Part V	4d	Record decision of individual who voted?
Part V	1e	Part V	4e	Use comparables to set compensation?
Part V	1f	Part V	4f	Record both information used and its source?
Part V	1g	Part V	4g	Other practices?
Part V	2	Part V	5 a, b, c	Adopted a conflict of interest policy?
Part V	3	Part V	6 a	Compensate through non-fixed payments?
Part V	4	Part V	7a, b	Goods, services transactions with insiders?
Part V	5	Part V	8a-e	Leases, contracts, loans, etc. with insiders?

Find E-file Info in a Paper 1023, page 4

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<i>Electronic 1023</i>		<i>2017 Form 1023</i>		<i>Information</i>
Part V	6	Part VIII	7a	Contract to develop, build, market, facilities?
Part V	7	Part V	7b	Outsiders manage your activities or facilities?
Part V	8	Part VIII	8	Joint ventures?
Part VI	1	Part IX	1,2	Determine revenue/expense years to provide.
Part VI	A	Part IX	A	Statement of Revenues and Expenses
Part VI	B	Part X	B	Balance Sheet
Part VII	1	Part X		Foundation classification you are requesting
Part VII	1a	Part X	1b	508(e) requires special provisions
Part VII	1b	Part VIII	22	Scholarships, fellowships, educational loans?
Part VII	1c	Part X	2	Private operating foundation?
Part VII	1d	Part X	3, 4	Describe how you meet POF requirements
Part VII	2i, ii	Part X	6a (i), (ii)	Clause (vi) tests
Part VII	2a i, ii, iii	Part VII	6b (i), (ii)	509(a)(2) tests
Part VIII	1	Part VII	2	Effective Date
Part IX	1	Part I	10	Annual Filing Requirements
Part X		Part XI		Signature