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*Getting Exempt Organizations tax law information into
the hands of the small organizations that need it most.*

- * AUTHOR/PUBLISHER - Prepare Your Own 501(c)(3) Application
Originally published 2002; revised 2004, 2006, 2008, 2010, 2012, 2014 and 2016. This ebook
and several "supplements" available at www.501c3Book.com.
- * PUBLIC SERVICE WEBSITE - www.form1023help.com
Detailed line-by-line help for organizations completing IRS Form 1023, the Application for
Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code. First
established in 1998, this website was merged into 501c3Book.com in 2016.
- * DECADES OF PRIME EXPERIENCE WITH NON-PROFITS 1986 to present: Private tax
consultant assisting non-profit boards with exemption applications, inquiries, appeals, and other
matters. IRS Exempt Organizations Specialist 1974 to 1986: Reviewed applications from non-
profits seeking IRS recognition (approximately 3000); audited every type of Federal return
required of non-profit organizations (approximately 300).
- * SOME COMMENTS "I consider this to have been a remarkably painless and trouble-free
exercise in securing a determination letter." (Ann Forest Burns, Attorney) ♦ "I can't thank you
enough for your thoughtful guidance. As I read through the application, I realized that it would
have taken at least twice as long if I had tried to do it all myself. Your expertise and knowledge
was evident on every page." (Portland Civic Theatre Guild) ♦ "Your assistance was very
valuable. [Our organization] would still be spinning its wheels if not for your outstanding insight
into the 501(c)(3) world." (Elizabeth Heile). *While with the IRS*: "You have helped to dispel the
image of the uncaring or power hungry bureaucrat who can help but won't." (Jewish Family &
Child Service, Portland) ♦ "[You] dealt with the issues in this case, which are among the most
complicated in the exempt organizations area, with aplomb." (J. Imsley, IRS Reviewer)
- * OTHER INFORMATION Writer and editor for the Northwest EP/EO Bulletin, an IRS
newsletter for attorneys and accountants, 1981-1986. Over 50 professional articles published.
Diverse public speaking assignments representing both the IRS and my own business, 1975-
present. Taught Exempt Organizations tax law to IRS agents both in the classroom and on the
job, 1980-1986. Audited individual income tax returns 1973-1974. IRS Honors: Special
Achievement Award, 1976 & 1980; Sustained Superior Performance Award, 1985
- * EDUCATION BA, Anthropology (honors) University of California, Santa Cruz, 1972.
Additional college and graduate level courses in accounting, management, and law, City College,
University of Puget Sound, and UPS Law School.
- * PERSONAL Born 1950, married. Phone (907)457-1498. Email: exempts@aol.com.