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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

Prepare Your Own 501(c)(3) Application, originally published 2002; revised 2004, 2006, 2008, 2010, 2012, 2014, 2016, 2019 and 2020. This ebook 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 has now been merged with 501c3Book.com, or search "Form1023help" - no spaces.

* DECADES OF PRIME EXPERIENCE WITH NON-PROFITS

Private tax consultant assisting non-profit boards with exemption applications, inquiries, appeals, and other matters. [1986 to present] Reviewed applications from non-profits seeking IRS recognition (approximately 3000); audited every type of Federal return required of non-profit organizations (approximately 300). [IRS Exempt Organizations Specialist 1974 to 1986]

* 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

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