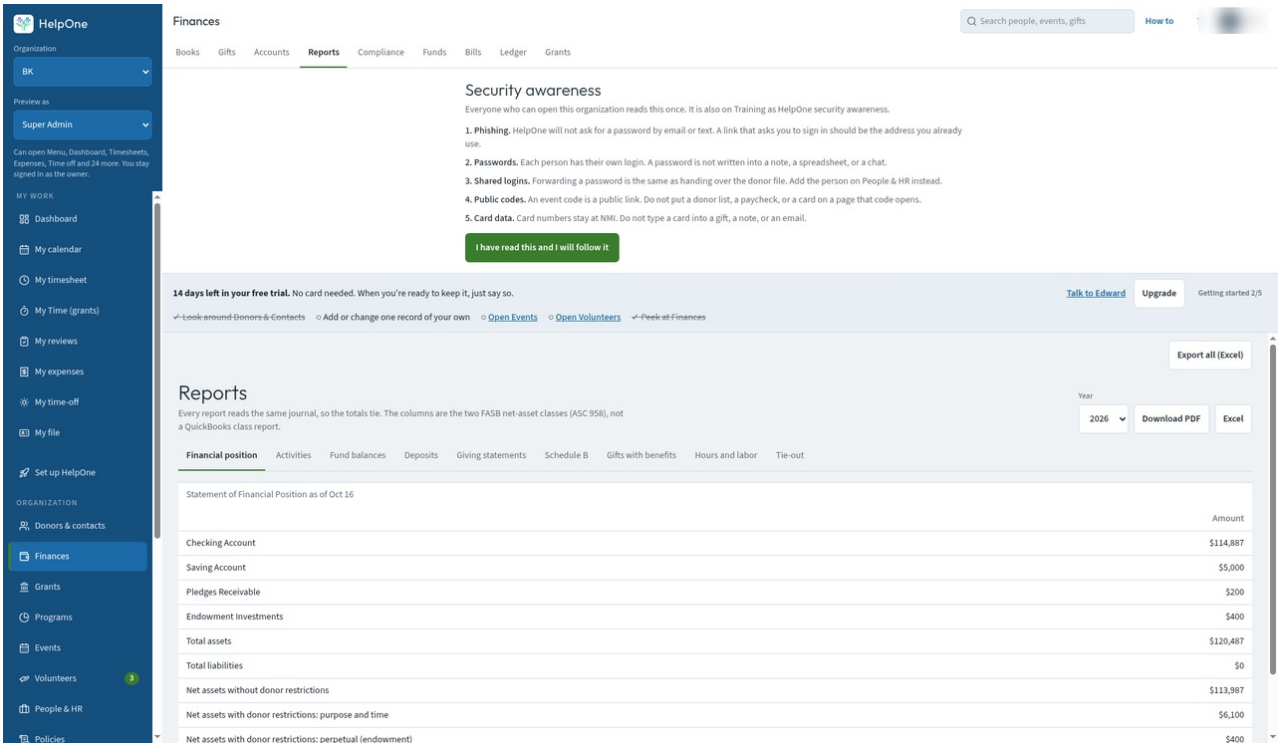
How to run Form 990 and CHAR 500 reports

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HelpOne gives you the numbers your accountant needs for Form 990 and New York's CHAR 500.

Steps

1. Go to Finances > Reports.
2. Pick the Year.
3. Download the reports you need: Financial position, Activities, Fund balances, Schedule B, Gifts with benefits, and Hours and labor.
4. Click Download PDF or Excel and send them to your accountant.



Deadlines and forms

Finances > Compliance has the compliance-form PDFs, Key deadlines you can add to your calendar, and a checklist.

Tip: Run these mid-year so any surprises show up in July, not at filing time.