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| **NONPROFIT CLIENT**  **INFORMATION** |
| **Date:** Click here to enter text. |
| **Legal Name of Nonprofit:** Click here to enter text. |
| **Mailing address:** Click here to enter text. |
| **Physical address:** Click here to enter text. |
| **Website:** Click here to enter text. |
| ***Please indicate main contact for attorney, as agreed by board of directors.***  **Executive Director/Administrator:**Click here to enter text.  **Title:** Click here to enter text.  **Phone Number (s):** Click here to enter text.  **E-mail:** Click here to enter text. |
| **Board Chair:**  **Phone Number(s):** Click here to enter text.  **E-mail:** Click here to enter text. |
| **Board of Directors [name, position]**  Click here to enter text. |
| **Board's Regular Meeting Date:** Click here to enter text. |
| **Fiscal Year:** Click here to enter text. |
| **Number of Employees:** Click here to enter text.  **Full-time:** Click here to enter text.  **Part-time:** Click here to enter text.  **Contractors:** Click here to enter text. |
| **Attach Documents:**  **Articles of Incorporation**  **Bylaws**  **IRS Determination Letter and 1023 filing**  **Latest Audit Report (if any)**  **Latest Form 990** |
| **Topics of Interest for Training (board and/or staff)**  Click here to enter text. |
| **FOR OFFICE USE ONLY** |
| **Fee Agreement:**  **Interview:**  **Registered Agent:**  **Documents Received:**  **Secretary of State Filing:**  **Registry Date:**  **OR DOJ:**  **Annual Revenue:**  **Assets**  **IRS:**  **Notes:** |