



NONPROFIT CLIENT INFORMATION

Date:

Legal Name of Nonprofit:

Mailing address:

Physical address:

Website:

Please indicate main contact for attorney, as agreed by board of directors.

Executive Director/Administrator:

Title:

Phone Number (s):

E-mail:

Board Chair:

Phone Number(s):

E-mail:

Board of Directors [name, position]



Board's Regular Meeting Date:

Fiscal Year:

Number of Employees:

Full-time:

Part-time:

Contractors:

Attach Documents:

- Articles of Incorporation**
 - Bylaws**
 - IRS Determination Letter and 1023 filing**
 - Latest Audit Report (if any)**
 - Latest Form 990**
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Topics of Interest for Training (board and/or staff)



FOR OFFICE USE ONLY

Fee Agreement:

Interview:

Registered Agent:

Documents Received:

Secretary of State Filing:

Registry Date:

OR DOJ:

Annual Revenue:

Assets

IRS:

Notes: