



Annual Update Checklist

Thank you for taking the time to keep your GivingMatters profile up-to-date! Your first step to processing your Annual Update is to login to GivingMatters.com as a Nonprofit [here](#).

Once logged in, choose My GivingMatters Profile at the top of your Dashboard. You will then see the tabs highlighted below within the left-hand margin. As you make updates, do not forget to choose “Save” before moving onto the next tab:

General Information:

- Review **organizational contact information** (address, phone, email) for accuracy. Ensure that the “Grant Address” listed is your organization’s current mailing address.

Programs:

- Update information for programs listed. In particular, **Program Budget** numbers should be current, **Target Population** should be identified, and **Examples of Program Success** fields should list current program outcome information.

Management & Staff:

- Review staffing information, especially **Executive Director name** and **contact information** for accuracy.

Governance>Basic Info:

- Ensure that current **board chair name and term dates** are accurate. (If there is a Board Co-Chair, confirm that their name and terms are up-to-date.)
- Review Board Demographics to ensure accuracy.

Governance>Governance Details:

- Update **Board Members**.

Financials>Basic Info:

- Update **expiration date of current Charitable Solicitations Permit, or extension date**.
- Update Endowment value, if applicable.
- Update Capital Campaign information, if applicable.

Financials>Financials Details:

- Add **Current Fiscal Year Dates with Projected Revenues and Expenses** for current fiscal year.
- Upload a copy of current fiscal year **Organizational Budget**. If you need a template, click [here](#).
 - All budgets must be labeled with the current fiscal year.
 - All budgets must include both projected income and expense.
- **Upload most recent Form 990, 990EZ, or 990N**. Documents must be pdf files.
 - 990 and 990EZ should include Schedules A, D, and O.
 - 990 and 990EZ must be signed and not in draft version.
 - Versions submitted should not be editable or password protected.
- **Upload most recent copy of your Financial Audit, if required to do so by the State of Tennessee**.
 - All Audits must be signed by Audit representative and not be in draft copy.
- **Upload copy of your renewed Charitable Solicitations permit**. See example [here](#).
 - If your organization’s permit renewal is under extension, you may upload a copy of your [Extension Approval](#) letter in the interim for an additional 90 days to process your annual update. Submission of renewed permit is still required for complete processing of annual update.