



Nonprofits & Community Groups

Keeping the paperwork current so the organization can focus on its mission.

What we deliver

- Annual report and state filing upkeep
- Grant application assembly and formatting
- Board records, minutes formatting and archives
- Donor and member spreadsheets
- Basic bookkeeping systems

What we hear

"We missed the annual report."

A volunteer moves on and the filing goes with them.

"The grant is due Friday."

Applications are assembled at the last minute from scattered documents.

"Where are the minutes from last year?"

Board records live in personal inboxes and boxes.

How the work runs

- REVIEW** Status: State record, filings and board documents reviewed.
- CATCH UP** File: Outstanding reports or reinstatement filed as the board directs.
- ORGANIZE** Archive: Minutes, bylaws and key documents in one organized archive.
- ONGOING** Keep current: Filing calendar, grant assembly and member records maintained.

Who we work with

Churches and ministries

Associations and clubs

Community organizations

Youth and sports leagues

Foundations

Volunteer-run groups

Documents we keep in order

- Articles and bylaws
- Annual report confirmations
- Board minutes
- Grant applications
- Donor and member lists
- Financial records for the treasurer

Capabilities engaged

Consulting & Strategy

Operations & Back Office

Records & Research

Business Filings

Document Services

Connections & Vetting

Technology Setup

Clear lines

We handle

Keep state filings current
Assemble and format grant applications
Organize board records
Clean up member and donor data

Licensed professional

Tax-exempt status decisions (attorney or CPA)
Form 990 preparation and review (CPA)
Governance and legal questions (attorney)
Grant content and decisions (the organization)