

BOOSTER 101 CHECKLIST OF REPONSIBILITIES, FILINGS AND COMPLIANCE

Umbrella	Stand-Alone	Where to File	When to File
Officer information: Name, Office Held, Mailing Address, Phone Number, Email	Officer information: Name, Office Held, Mailing Address, Phone Number, Email	SUSD-Principal	August of each year
Constitution or bylaws of Umbrella, any additional bylaws of the booster organization	Constitution or bylaws	SUSD-Principal	August of each year
Certificate of Insurance-can cover all entities under Umbrella	Certificate of Insurance-must cover Stand-Alone Organization	SUSD-Facilities	When securing/renting SUSD Facilities
Financial Report	Financial Report	Upon Request by SUSD	September 15 th of each year
Financial Review Report (Audit)	Financial Review Report (Audit)	Upon Request by SUSD	September 15 th of each year
IRS Form 990,990-EZ or 990-N on behalf of entities under Umbrella	IRS Form 990,990-EZ or 990-N	Internal Revenue Service	Varies: Due 4.5 months after booster organization year end
Arizona Corporation Commission Annual Filing (includes officers, any changes to bylaws, budget)	Arizona Corporation Commission Annual Filing (includes officers, any changes to bylaws, budget)	Arizona Corporation Commission	Annual filing date determined by ACC
IRS Determination Letter	IRS Determination Letter	Internal Revenue Service	Upon initial creation of non-profit organization