
LITC Program Year-End Report Package Submission Checklist

Please include this checklist as the cover sheet for your Year-End Report Package.

- 1. A completed Form 425, Federal Financial Report and Form 425a, Federal Financial Report Attachment (if necessary) for the period January 1 through December 31.
- 2. A complete financial narrative, describing how grant funds were expended for the period January 1 through December 31.
 - a. Itemization and explanation of the actual costs for all expenses.
 - b. The source, date, availability and amount of matching funds received for the LITC program.
 - c. Separate financial narratives for ESL and Controversy.
 - d. Statement of amount of unobligated funds.
- 3. Program Narrative for the period January 1 through December 31:
 - a. Implementation of the LITC Program
 - b. Information provided to ESL taxpayers
 - c. Training provided to students, volunteers, and LITC employees
 - d. Case tracking
 - e. Publicity for the LITC
 - f. Referral Mechanism for Controversies
 - g. Privacy and confidentiality
 - h. Pro Bono panel
 - i. Nominal fees (if any)
 - j. Delivery of services
 - k. Miscellaneous
 - l. Program goals
 - m. Additional Activities (include Interesting Issues or Success Stories but be careful not to include taxpayer identifying information)
 - n. Last Year in LITC Program (if applicable)
 - o. Special orders for student practice
 - p. Statement describing the reason a controversy case was accepted where the amount in controversy exceeded \$50,000

- 4. Interim and Year-End Report Form (Form 13424-A in Appendix C)

Name of person that completed Form 13424-A

Phone number

- 5. Supplemental Issues Form (Form 13424-B in Appendix C (controversy only))

Name of person that completed Form 13424-B

Phone number

- 6. Advocacy Report Form (Form 13424-C in Appendix C)