

EXEMPT ORGANIZATIONS FORM 1023-EZ APPROVALS

INTRODUCTION

Form 1023-EZ approval information is extracted from the Internal Revenue Service's Tax Exempt Determination Reporting System. The data is based on approved closures and is extracted quarterly to the annual summary document. The files are in a Microsoft Excel spreadsheet format (xlsx) format and can be opened by Microsoft Excel or its corresponding viewer.

Organizations approved through the Form 1023-EZ application process are issued a determination letter that is considered valid as long as the organization complies with the provisions of its exemption.

If you have any questions about tax exempt organizations or the content of the files, please contact TE/GE Customer Account Services toll-free line at 1-877-829-5500.

FIELDS AVAILABLE

All quarterly and annual files will contain the following data fields:

<u>Column Name</u>	<u>Contents</u>
EIN	Employer identification number
CASE NUMBER	Case Number
FORMREVISION	Form 1023-EZ version
ELIGIBILITYWORKSHEET	Eligibility Worksheet
ORGNAME1	Organization Primary Name
ORGNAME2	Organization Secondary Name
ADDRESS	Organization's Mailing Address
CITY	City
STATE	State
ZIP	ZIP
ZIPPL4	ZIP+4
ACCOUNTINGPERIODEND	Accounting period End
PRIMARYCONTACTNAME	Primary contact name
PRIMARYCONTACTPHONE	Primary contact phone
PRIMARYCONTACTPHONEEXT	Primary contact phone extension
PRIMARYCONTACTFAX	Primary contact fax
USERFEESUBMITTED	User fee submitted
OFCRDIRTRUST1FIRSTNAME	Officer/Director/Trustee First Name
OFCRDIRTRUST1LASTNAME	Officer/Director/Trustee Last Name
OFCRDIRTRUST1TITLE	Officer/Director/Trustee Title
OFCRDIRTRUST1STREETADDR	Officer/Director/Trustee Street Address
OFCRDIRTRUST1CITY	Officer/Director/Trustee City
OFCRDIRTRUST1STATE	Officer/Director/Trustee State
OFCRDIRTRUST1ZIP	Officer/Director/Trustee Zip
OFCRDIRTRUST1ZIPPL4	Officer/Director/Trustee Zip+4
OFCRDIRTRUST2FIRSTNAME	Officer/Director/Trustee First Name
OFCRDIRTRUST2LASTNAME	Officer/Director/Trustee Last Name
OFCRDIRTRUST2TITLE	Officer/Director/Trustee Title
OFCRDIRTRUST2STREETADDR	Officer/Director/Trustee Street Address
OFCRDIRTRUST2CITY	Officer/Director/Trustee City
OFCRDIRTRUST2STATE	Officer/Director/Trustee State
OFCRDIRTRUST2ZIP	Officer/Director/Trustee Zip
OFCRDIRTRUST2ZIPPL4	Officer/Director/Trustee Zip+4
OFCRDIRTRUST3FIRSTNAME	Officer/Director/Trustee First Name
OFCRDIRTRUST3LASTNAME	Officer/Director/Trustee Last Name
OFCRDIRTRUST3TITLE	Officer/Director/Trustee Title

FIELDS AVAILABLE (cont'd)

<u>Column Name</u>	<u>Contents</u>
OFCRDIRTRUST3STREETADDR	Officer/Director/Trustee Street Address
OFCRDIRTRUST3CITY	Officer/Director/Trustee City
OFCRDIRTRUST3STATE	Officer/Director/Trustee State
OFCRDIRTRUST3ZIP	Officer/Director/Trustee Zip
OFCRDIRTRUST3ZIPPL4	Officer/Director/Trustee Zip+4
OFCRDIRTRUST4FIRSTNAME	Officer/Director/Trustee First Name
OFCRDIRTRUST4LASTNAME	Officer/Director/Trustee Last Name
OFCRDIRTRUST4TITLE	Officer/Director/Trustee Title
OFCRDIRTRUST4STREETADDR	Officer/Director/Trustee Street Address
OFCRDIRTRUST4CITY	Officer/Director/Trustee City
OFCRDIRTRUST4STATE	Officer/Director/Trustee State
OFCRDIRTRUST4ZIP	Officer/Director/Trustee Zip
OFCRDIRTRUST4ZIPPL4	Officer/Director/Trustee Zip+4
OFCRDIRTRUST5FIRSTNAME	Officer/Director/Trustee First Name
OFCRDIRTRUST5LASTNAME	Officer/Director/Trustee Last Name
OFCRDIRTRUST5TITLE	Officer/Director/Trustee Title
OFCRDIRTRUST5STREETADDR	Officer/Director/Trustee Street Address
OFCRDIRTRUST5CITY	Officer/Director/Trustee City
OFCRDIRTRUST5STATE	Officer/Director/Trustee State
OFCRDIRTRUST5ZIP	Officer/Director/Trustee Zip
OFCRDIRTRUST5ZIPPL4	Officer/Director/Trustee Zip+4
ORGURL	Organization's website
ORGEMAIL	Organization's email
ORGTYPESCORP	Organization Incorporated
ORGTYPESUNINCORP	Organization unincorporated
ORGTYPESTRUST	Organization trust
NECESSARYORGDOCS	Necessary Organizing Documents
INCORPORATEDDATE	Organization Incorporation Date
INCORPORATEDSTATE	Organization Incorporation State
CONTAINSLIMITATION	Contains Limitation
DOESNOTEXPRESSLYEMPOWER	Does not expressly empower
CONTAINSDISSOLUTION	Contains dissolution
NTEECODE	National Taxonomy of Exempt Entities (NTEE) code
ORGPURPOSECHARITABLE	Organization's purpose Charitable
ORGPURPOSERELIGIOUS	Organization's Purpose Religious
ORGPURPOSEEDUCATIONAL	Organization's Purpose Educational
ORGPURPOSESCIENTIFIC	Organization's Purpose Scientific
ORGPURPOSELITERARY	Organization's Purpose Literary
ORGPURPOSEPUBLICSAFETY	Organization's Purpose Public Safety
ORGPURPOSEAMATEURSPORTS	Organization's Purpose Amateur Sports
ORGPURPOSECRUELTYPREVENTION	Organization's Purpose Cruelty Prevention
QUALIFYFOREXEMPTION	Qualify For Exemption
LEGINFLNO	Legislation influence No
LEGINFLYES	Legislation influence Yes
COMPOFCRDIRTRUSTNO	Compensation of Officer director trustee No
COMPOFCRDIRTRUSTYES	Compensation of Officer director trustee Yes
DONATEFUNDSNO	Donation of funds No
DONATEFUNDSYES	Donation of funds Yes
CONDUCTACTYOUTSIDEUSNO	Conducting Activities Outside of United States No
CONDUCTACTYOUTSIDEUSYES	Conducting Activities Outside of United States Yes
FINANCIALTRANSOFCRSNO	Financial transactions with officers No
FINANCIALTRANSOFCRSYES	Financial transactions with officers Yes

FIELDS AVAILABLE (cont'd)

<u>Column Name</u>	<u>Contents</u>
UNRELGROSSINCM1000MORENO	Unrelated Gross Income \$1,000 or More No
UNRELGROSSINCM1000MOREYES	Unrelated Gross Income \$1,000 or More Yes
GAMINGACTYNO	Gaming Activity No
GAMINGACTYES	Gaming Activity Yes
DISASTERRELIEFNO	Disaster relief assistance No
DISASTERRELIEFYES	Disaster relief assistance Yes
ONETHIRDSUPPORTPUBLIC	One Third Support Public
ONETHIRDSUPPORTGIFTS	One Third Support Gifts
BENEFITOFCOLLEGE	Benefit of College
PRIVATEFOUNDATION508E	Private Foundation 508(e)
SEEKINGRETROREINSTATEMENT	Seeking Retroactive Reinstatement
SEEKINGSEC7REINSTATEMENT	Seeking Section 7 Reinstatement
CORRECTNESSDECLARATION	Correctness Declaration
SIGNATURENAME	Signature Name
SIGNATURETITLE	Signature Title
SIGNATUREDATE	Signature Date

DEFINITIONS

COLUMN A - EMPLOYER IDENTIFICATION NUMBER (EIN)

Employer Identification Number (EIN) is a nine digit number assigned by the IRS to identify a particular organization's account.

COLUMN B - CASE NUMBER

Unique tracking number assigned to organization's application upon receipt of Form 1023-EZ.

COLUMN C - FORM 1023-EZ VERSION

Version of Form 1023-EZ submitted by Organization.

COLUMN D - ELIGIBILITY WORKSHEET

Organization must complete the Eligibility Worksheet to determine if they are eligible to file the Form 1023-EZ. 1=Eligible 0=Ineligible

COLUMN E - ORGANIZATION PRIMARY NAME

Organization's name exactly as it appears on their organizing documents, including amendments.

COLUMN F - ORGANIZATION SECONDARY NAME

Portion of Organization's name that exceeds 35 character limit of Column E.

COLUMNS G, H, I, J, K - ORGANIZATION'S MAILING ADDRESS

Organization's complete mailing address where all correspondence will be sent.

COLUMN L - ACCOUNTING PERIOD END

Month Organization's tax year ends (01-12). For example, if organization's annual accounting period ends December 31, column will display "12."

COLUMN M - PRIMARY CONTACT NAME

Name and title of the person to contact if more information is needed. The person to contact may be an officer, director, trustee, or other individual who is permitted to speak on behalf of the organization according to bylaws or other rules of operation. Person to contact may also be an "authorized representative," such as an attorney, certified public accountant (CPA), or enrolled agent (EA).

DEFINITIONS (cont'd)

COLUMNS N, O, P - PRIMARY CONTACT PHONE, EXTENSION, AND FAX NUMBER

Primary Contact's daytime telephone number.

COLUMN Q - USER FEE SUBMITTED

Amount organization submitted for user fee (The current user fee is \$400.)

COLUMNS R, S, T, U, V, W, X, Y - OFFICER/DIRECTOR/TRUSTEE NAME, TITLE, AND ADDRESS

Name, title, and complete mailing address of organization's first listed officer, director, and/or trustee.

COLUMNS Z, AA, AB, AC, AD, AE, AF, AG - OFFICER/DIRECTOR/TRUSTEE NAME, TITLE, AND ADDRESS

Name, title, and complete mailing address of organization's second listed officer, director, and/or trustee.

COLUMNS AH, AI, AJ, AK, AL, AM, AN, AO - OFFICER/DIRECTOR/TRUSTEE NAME, TITLE, AND ADDRESS

Name, title, and complete mailing address of organization's third listed officer, director, and/or trustee.

COLUMNS AP, AQ, AR, AS, AT, AU, AV, AW - OFFICER/DIRECTOR/TRUSTEE NAME, TITLE, AND ADDRESS

Name, title, and complete mailing address of organization's fourth listed officer, director, and/or trustee.

COLUMNS AX, AY, AZ, BA, BB, BC, BD, BE - OFFICER/DIRECTOR/TRUSTEE NAME, TITLE, AND ADDRESS

Name, title, and complete mailing address of organization's fifth listed officer, director, and/or trustee.

Column BF - ORGANIZATION'S WEBSITE (URL)

Organization's current website address, "N/A"=not applicable).

Column BG - ORGANIZATION'S EMAIL

Organization's email address.

Column BH - ORGANIZATION INCORPORATED

Organization Incorporated

1=Yes 0=No

Column BI - ORGANIZATION UNINCORPORATED

Organization Unincorporated 1=Yes 0=No

Column BJ - ORGANIZATION TRUST

Organization is a Trust

1=Yes 0=No

Column BK - NECESSARY ORGANIZING DOCUMENTS

Organization submitted necessary organizing documents 1=Yes 0=No

Column BL - ORGANIZATION INCORPORATION DATE

Organization's formation date.

Column BM - ORGANIZATION INCORPORATION STATE

The jurisdiction (for instance, the state or the federally recognized tribal government) under the laws of which you were incorporated or otherwise formed.

DEFINITIONS (cont'd)

Column BN - CONTAINS LIMITATION

Organization's organizing document limits their purpose to those described in section 501(c)(3)
1=Yes 0=No.

Column BO - DOES NOT EXPRESSLY EMPOWER

Organization's organizing document does not expressly empower the organization to engage, otherwise than as an insubstantial part of their activities, in activities that in themselves are not in furtherance of one or more exempt purposes described in section 501(c)(3).
1=Yes 0=No.

Column BP - CONTAINS DISSOLUTION

Organization's organizing document permanently dedicates their assets for a section 501(c)(3) purpose.
1=Yes 0=No.

Column BQ - NATIONAL TAXONOMY OF EXEMPT ENTITIES (NTEE) CODE

Organization's National Taxonomy of Exempt Entities (NTEE) code is a three-character series of letters and numbers that generally summarize an organization's purpose.

Column BR - ORGANIZATION'S PURPOSE CHARITABLE

Organization is organized and operated exclusively for one or more of the following purposes: charitable, religious, educational, scientific, literary, testing for public safety, fostering national or international amateur sports competition, or preventing cruelty to children or animals.
1=Yes 0=No.

Column BS - ORGANIZATION'S PURPOSE RELIGIOUS

Organization is organized and operated exclusively for Religious purposes
1=Yes 0=No.

Column BT - ORGANIZATION'S PURPOSE EDUCATIONAL

Organization is organized and operated exclusively for Educational purposes
1=Yes 0=No.

Column BU - ORGANIZATION'S PURPOSE SCIENTIFIC

Organization is organized and operated exclusively for Scientific purposes
1=Yes 0=No.

Column BV - ORGANIZATION'S PURPOSE LITERARY

Organization is organized and operated exclusively for Literary purposes
1=Yes 0=No.

Column BW - ORGANIZATION'S PURPOSE PUBLIC SAFETY

Organization is organized and operated exclusively for Public Safety purposes
1=Yes 0=No.

Column BX - ORGANIZATION'S PURPOSE AMATEUR SPORTS

Organization is organized and operated exclusively for Amateur Sports purposes
1=Yes 0=No.

Column BY - ORGANIZATION'S PURPOSE CRUELTY PREVENTION

Organization is organized and operated exclusively for Cruelty Prevention purposes
1=Yes 0=No.

Column BZ - QUALIFY FOR EXEMPTION

Organization qualifies for exemption under section 501(c)(3)
1=Yes 0=No.

DEFINITIONS (cont'd)

Column CA - LEGISLATION INFLUENCE NO

Organization has not attempted or has no plans to attempt to influence legislation
1=Yes 0=No.

Column CB - LEGISLATION INFLUENCE YES

Organization has attempted or has plans to attempt to influence legislation
1=Yes 0=No.

Column CC - COMPENSATION OF OFFICER DIRECTOR TRUSTEE NO

Organization has not paid and has no plans to pay compensation to any officers, directors, or trustees
1=Yes 0=No.

Column CD - COMPENSATION OF OFFICER DIRECTOR TRUSTEE YES

Organization has paid or has plans to pay compensation to any officers, directors, or trustees
1=Yes 0=No.

Column CE - DONATION OF FUNDS NO

Organization has not donated funds or paid expenses to any individuals and has no plans to donate funds or pay expenses to any individuals
1=Yes 0=No.

Column CF - DONATION OF FUNDS YES

Organization has donated funds or paid expenses to individuals or has plans to donate funds or pay expenses to individuals
1=Yes 0=No.

Column CG - CONDUCTING ACTIVITIES OUTSIDE OF UNITED STATES NO

Organization has not conducted and has no plans to conduct activities outside the United States
1=Yes 0=No.

Column CH - CONDUCTING ACTIVITIES OUTSIDE OF UNITED STATES YES

Organization has conducted or has plans to conduct activities outside the United States
1=Yes 0=No.

Column CI - FINANCIAL TRANSACTIONS WITH OFFICERS NO

Organization has not engaged in and has no plans to engage in financial transactions (for example, loans, grants, or other assistance, payments for goods or services, rents, etc.) with their officers, directors, or trustees, or any entities they own or control.
1=Yes 0=No.

Column CJ - FINANCIAL TRANSACTIONS WITH OFFICERS YES

Organization has engaged in or plans to engage in financial transactions (for example, loans, grants, or other assistance, payments for goods or services, rents, etc.) with their officers, directors, or trustees, or any entities they own or control.
1=Yes 0=No.

Column CK - UNRELATED GROSS INCOME \$1,000 OR MORE NO

Organization has not received and does not plan to receive unrelated business gross income of \$1,000 or more during a tax year.
1=Yes 0=No.

DEFINITIONS (cont'd)

Column CL - UNRELATED GROSS INCOME \$1,000 OR MORE YES

Organization has received or plans to receive unrelated business gross income of \$1,000 or more during a tax year.

1=Yes 0=No.

Column CM - GAMING ACTIVITY NO

Organization has not conducted and has no plans to conduct bingo or other gaming activities.

1=Yes 0=No.

Column CN - GAMING ACTIVITY YES

Organization has conducted or has plans to conduct bingo or other gaming activities.

1=Yes 0=No.

Column CO - DISASTER RELIEF ASSISTANCE NO

Organization has not provided and has no plans to provide Disaster Relief assistance.

1=Yes 0=No.

Column CP - DISASTER RELIEF ASSISTANCE YES

Organization has provided or has plans to provide Disaster Relief assistance.

1=Yes 0=No.

Column CQ - ONE THIRD SUPPORT PUBLIC

Organization normally receives at least one-third of their support from public sources or they normally receive at least 10 percent of their support from public sources and they have other characteristics of a publicly supported organization. Sections 509(a)(1) and 170(b)(1)(A)(vi).

1=Yes 0=No.

Column CR - ONE THIRD SUPPORT GIFTS

Organization normally receives at least one-third of their support from a combination of gifts, grants, contributions, membership fees, and gross receipts (from permitted sources) from activities related to their exempt functions and normally receive not more than one-third of their support from investment income and unrelated business taxable income. Section 508(a)(2).

1=Yes 0=No.

Column CS - BENEFIT OF COLLEGE

Organization is organized and operated exclusively to receive, hold, invest, and administer property for and make expenditures to or for the benefit of a state or municipal college or university

1=Yes 0=No.

Column CT - PRIVATE FOUNDATION 508(E)

Organization's organizing document contains specific provisions required by section 508(e)

1=Yes 0=No.

Column CU - SEEKING RETROACTIVE REINSTATEMENT

Organization had their exempt status automatically revoked under section 6033(j)(1) of the Code and they are applying for reinstatement under section 4 or 7 of Rev. Proc. 2014-11, 2014-3 I.R.B. 411

1=Yes 0=No.

Column CV - SEEKING SECTION 7 REINSTATEMENT

Organization is seeking reinstatement under section 7 of Rev. Proc. 2014-11 and they agree to accept an effective date of reinstatement as of the date of filing their application.

1=Yes 0=No.

DEFINITIONS (cont'd)

Column CW - CORRECTNESS DECLARATION

An organization Officer, Director, Trustee, or other authorized official checked the “penalties of perjury” box indicating, “I declare under the penalties of perjury that I am authorized to sign this application on behalf of the organization and that I have examined the application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete”.

1=Yes 0=No.

Column CX, CY, CZ - SIGNATURE NAME, TITLE, AND SIGNATURE DATE

Full name, title, and signature date of the organization Officer, Director, Trustee, or other authorized official that signed the Form 1023-EZ under “penalties of perjury”.