

## Private Foundation Information Checklist

Proposed Name of Charity: \_\_\_\_\_

Address of Charity: \_\_\_\_\_

Number of Trustees \_\_\_\_\_

Names and Addresses of Trustees:

Will the trustees be compensated? [avoid this at all costs] \_\_\_\_\_

Will there be any employees or other people who will be compensated? \_\_\_\_\_

Purpose of Charity: \_\_\_\_\_

Estimated Sources of donations and amounts for the next three years:

Current Year Sources \_\_\_\_\_ Amount \$ \_\_\_\_\_

Following Year Sources \_\_\_\_\_ Amount \$ \_\_\_\_\_

Following Year Sources \_\_\_\_\_ Amount \_\_\_\_\_

Estimated Expenses for the next three years:

Current Expenses:

Following Year Expenses:

Following Year Expenses:

Will the charity be soliciting donations from the public? \_\_\_\_\_

Will the charity have any contractual relationships or close ties with people or businesses? If yes, explain: