



Incorporating your nonprofit organization can help you to establish the kind of legal protection that separates personal assets from the activities of the corporation. By acquiring Federal tax-exempt status, you will position your organization to solicit donors, receive supportive funding, and ensure that your supporters receive desired tax write-offs.

Our Progress 501(c) and 501(c)(3) Services includes the following:

- One hour, quick-start welcome call with a nonprofit expert.
- IRS Form 1023 application completion.
- Additional Schedules completed, if required
- Narratives & Explanations (Your organization's programs and descriptions in a narrative format).
- Completion of 3-year financial budget and projections
- IRS required Conflict of Interest Policy.
- Review of Articles for required IRS language.
- Completed IRS checklist
- Inventory of Documents completed.
- 8-business day turnaround from order submission to IRS filing
- Completed application packet USPS priority mailed to IRS, postage paid: Packet includes: Form 1023 checklist, Form 2848 Power of Attorney, Form 1023 Application, Schedules A – H as required, Copy of Articles of Incorporation, Bylaws, Narratives and Explanations of programs and activities, Financial Data, copies of organization's marketing materials and fundraising efforts, scanned, ordered and labeled per IRS protocols. Online submission available for quicker turnaround.
- Documents USPS priority mailed to you for review and signature.
- A nonprofit advisor available to help you every step of the way.

The Progress Package also includes these valuable services:

- **Professional IRS representation and case management** – Our team contacts the IRS on behalf of your organization. A completed form 2848 allows our team to receive IRS correspondence and respond to the IRS if the client is unavailable. You will never miss an important IRS notice or deadline.
- **STEPS Institute of Management and Learning** – Immediate access to online educational programs to help you start, fund and grow your nonprofit. The Institute contains modules; each containing multiple lessons on crafting your mission statement, creating your organization's vision, defining values, selecting board members and officers, nonprofit governance, tax compliance and receipting of donations, fundraising and much more. You will receive invites to live trainings aimed at teaching you how to manage and grow your nonprofit as well as alerts of important changes in the tax code. The Progress Package includes one course provided by the Institute (a \$450 value).
- **Drafting of IRS response letters** – Most organizations will receive written questions from the IRS. It is not uncommon to receive technical questions that must be answered before your application will be approved. Our team will assist in drafting IRS response letters and speak directly with IRS examiners to expedite the question and answer process.
- **100% Approval, Money Back Guarantee*** – Our team will work with your business, for as long as it takes to receive a positive letter of determination.



THE PROGRESS PACKAGE IS PRICED AT \$1,250

*Does not include IRS user fee or incorporation fees.

DISCLAIMER – STEPS, Inc. does not provide tax or legal advice and the information above should not be relied upon in making any tax or legal decision.

Ready to Obtain 501(c)(3) Tax Exempt Status?
Call now to place your order: **877.447.0900 #2** or
email us at **info@stepsofexcellence.org**.



STEPS, Inc.

200 Centennial Place, La Plata, MD 20646

www.stepsofexcellence.org | (877) 447-0900 | info@stepsofexcellence.org