

United Daughters of the Confederacy®
Annual Financial Report and Required 501(c)(3) Form

Division: _____ City of Chapter: _____

Entity: _____ Chapter Number: _____

This form must be completed annually by every entity of the Organization. The original form and one copy must be submitted to the Division Treasurer each year by October 31. Keep one copy in entity files for at least 6 years. The Division Treasurer will send the original form to the Treasurer General by November 30 and keep the copy in the Division files for at least 6 years. The Annual Financial Report Form must cover the reporting year from September 1–August 31 period. Refer to Treasurer General’s Manual.

REPORTING ENTITY:												
Division	<input type="checkbox"/>	CWND	<input type="checkbox"/>	Chapter	<input type="checkbox"/>	Club	<input type="checkbox"/>	Cooperation	<input type="checkbox"/>	CofC	<input type="checkbox"/>	
Reporting Year:												
September 1, 20		-	August 31, 20									
ENTITY FILING STATUS:												
File IRS 990 if Gross Receipts >\$200,000 and Net Assets >\$500,000 - Copy Attached									Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
File IRS 990-EZ if Gross Receipts <\$200,000 and Net Assets <\$500,000 - Copy Attached									Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
File IRS 990-N efile if Gross Receipts <\$50,000 and Net Assets < N/A - Copy Attached									Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
SECTION 1. ENTITY INFORMATION												
Name of Entity												
Entity’s Employer Identification Number (EIN)												
Name of Person Completing Form								Office Held				
Address of Person Completing Form												
City / State / Zip +4												
Signature of Person Completing Form (Signature Required)												
SECTION 2. ENTITY INCOME / EXPENSE												
Beginning balance on September 1, 20												\$
Total cash assets including checking account, savings account, all other accounts, investments, etc. Note: Beginning balance must match ending balance from preceding year												
INCOME												
Per Capita Tax/Dues (Include Division/General)												\$
UDC Magazine Subscriptions												\$
Contributions (Gifts or Financial Donations)												\$
Investment Income												\$
Miscellaneous Income (List in Miscellaneous section on Page 2)												\$
TOTAL INCOME												\$
EXPENSES												
Per Capita Tax/Dues (Include Division/General)												\$
UDC Magazine Subscriptions												\$
Operating Expense												\$
Contribution / Gifts												\$
Scholarship Awards												\$
Miscellaneous Expense (List in Miscellaneous section on Page 2)												\$
TOTAL INCOME												\$
Ending balance on September 1, 20												\$

