



# ANNUAL CHECKLIST FOR CHAPTERS

## FISCAL PERIOD:

**JANUARY - DECEMBER**

## REGISTERED AGENT:

**COGENCY GLOBAL**  
[WWW.COGENCYGLOBAL.COM](http://WWW.COGENCYGLOBAL.COM)

## IRS:

[WWW.IRS.GOV](http://WWW.IRS.GOV)

**\*COPY NATIONAL OFFICE**

- **Annual Business Meeting:**
  - Either elect or induct new officers after following the bylaws process for elections.
- **Officer Updates\*:**
  - Send any Board or officer updates using the Officer Update Form
- **Address Updates\*:**
  - Keep National informed of any updates submitted by members –address, phone, email.
- **Registered Agent:**
  - Pay fees to Cogency Global for Domestic Corporation Status in DC. \$125 each year. **Due May 1.**
- **File 990, 990EZ or 990N with IRS\*:**
  - Online notifications are available for chapters with gross revenues under \$50,000. **Due May 15**
- **Annual Audit:**
  - Review of Financial Guide to determine if your chapter should have an audit.
- **Annual Financial Reports\*:**
  - Reports due **May 15** to National Office.
- **Educational Programs:**
  - Required to hold a minimum of 4-6 programs a year.
- **Maintain Minutes:** Record Actions and Decisions.