

NAACP SHORT FORM (MEMBERSHIP ONLY FORM)

THIS SHOULD ONLY BE COMPLETED BY UNITS THAT DID NOT HAVE ANY FUNDRAISING CONTRIBUTION OR ENTERTAINMENT EFFORTS DURING THE CALENDAR YEAR. IF YOUR UNIT PARTICIPATED IN ONE OF THE ABOVE EVENTS PLEASE COMPLETE THE GROUP RETURN ANNUAL FINANCIAL REPORT.

2008 ANNUAL FINANCIAL REPORT

(Must be filed with National Office by March 1, 2009)

(Group Tax Return due to be filed by the National Office to the IRS by May 15, 2009)

CHECKLIST OF THE ITEMS TO BE SUBMITTED TO THE NATIONAL OFFICE BY EACH UNIT

- Cover Letter (Do not return to the National Office)
- Annual Financial Report Instructions (Please read and follow very carefully). Keep in the Unit's files for reference. Do not return to the National Office.
- Unit Information and Attestation (Please complete with appropriate signatures). The President and Treasurer of every Unit must sign the Report to be submitted, even when a Paid Preparer is used to complete the Annual Financial Report. Paid Preparers should sign Part V.
- Part I - Membership Only

MAIL COMPLETED ANNUAL FINANCIAL REPORT TO:

**NAACP - NATIONAL OFFICE
4805 MT. HOPE DRIVE
BALTIMORE, MARYLAND 21215
ATTN: FINANCE DEPARTMENT (AFR)**

**FINANCE DEPARTMENT
NATIONAL ASSOCIATION FOR THE ADVANCEMENT OF COLORED PEOPLE
4805 MOUNT HOPE DRIVE BALTIMORE, MARYLAND 21215 TEL # 410-580-5777**

**Re: 2007 ANNUAL FINANCIAL REPORT
(Must be filed with the National Office by March 1, 2009)**

Dear Sir/Madam:

The National Office of the NAACP is charged with the fiduciary responsibility of ensuring that all NAACP Units conduct their activities in an efficient and effective manner. In executing this responsibility, the National Office provides guidance to each Unit in the form of consultation, memoranda and training. In addition, a “ Unit Financial Bookkeeping Guide” is prepared and disseminated annually to each Unit. This guide outlines established financial and accounting policies to be followed by each unit. Non-compliance with these policies and procedures jeopardizes the fiscal integrity of the Unit as well as the National Office tax-exempt status. To ensure compliance with policies and procedures and assist the National Office in preparing the Group Information Return (IRS Form 990) to be filed annually with the Internal Revenue Service, **each Unit must complete and submit an Annual Financial Report attached by March 1, 2009.**

The Annual Financial Report is formatted to meet generally accepted accounting principles and income tax accounting requirements. This format allows us to capture all aspects of the Unit’s activities when preparing the Annual Group Tax Return. It also impels Units to maintain complete and accurate records.

According to the Internal Revenue Service instructions on preparing the Group Information Return (Form 990), **“every year, each local organization must authorize the central organization in writing to include it in the group return and must declare , under penalty of perjury, that the authorization and the information it submits to be included in the group return are true and complete.”**

We strongly advise every preparer to read and follow the instructions provided because any incomplete or improper categorization shall result in the report being returned to the Unit and the Unit excluded from the Group Information Return.

We thank you for your consideration and look forward to your full cooperation. Remember that we are here to serve you. Please call the National Office if assistance is needed.

Sincerely,



J. Linloy Cox
Chief Financial Officer

**SHORT FORM
N A A C P (GROUP)
ANNUAL FINANCIAL REPORT INSTRUCTIONS**

ALL SEGMENTS OF THIS ANNUAL REPORT MUST BE COMPLETED

STEP #1

PLEASE VERIFY THAT YOU HAVE DOWNLOADED ALL THE REQUIRED SHEETS. **THE SIGNATURE PAGE AND PART I MUST BE RETURNED TO THE NATIONAL OFFICE.**

IF YOU DO NOT RETURN THE ANNUAL REPORT IN THIS FORMAT WE WILL BE UNABLE TO ACKNOWLEDGE THE RECEIPT OF YOUR UNIT'S ANNUAL FINANCIAL REPORT. THIS WILL AFFECT YOUR PARTICIPATION PRIVILEGES AT THE NATIONAL CONVENTION AND STATE/ STATE-AREA CONFERENCE.

PLEASE MAKE A COPY OF ALL FORMS BEFORE YOU BEGIN THE PROCESS.

USE A PENCIL TO COMPLETE THE PHOTOCOPY, THIS WILL ENABLE YOU TO CORRECT MISTAKES.

LINE 1 - 6 are very clear, so complete them accordingly from your data.

Each Unit is advised to properly categorize expense for calendar year 2008. If the amounts are incorrect, it makes reconciliation very difficult and problematic for the Unit.

PART III is the summary of the year's activities. It must show what the Unit began the year with, its income for the year, expenses and the ending balance for the year.

LINE 22 >>>>Every Unit must complete this line even if the Unit started the year with a negative or zero balance.

PLEASE ENTER THAT AMOUNT IN THE SPACE PROVIDED.

LINE 23 >>>>Enter the Unit's Income for the Year (Part I, Line 7).

LINE 24 >>>>Enter the Unit's Total Expenses, (Part II, Line 21).

Line 25 >>>> Subtract Line 24 from Line 23.

Line 5 >>>> **(AS NEEDED)** Add Line 11 Part II.

Line 6 >>>> Add line 22 and 25 above.

IF A PAID PREPARER WAS USED TO COMPLETE THIS REPORT, THE PREPARER MUST SIGN THE ANNUAL REPORT IN THE SPACE PROVIDED. THIS DOES NOT ELIMINATE THE NECESSITY FOR THE PRESIDENT'S AND TREASURER'S SIGNATURES.

FINALLY, PLEASE TAKE THE TIME TO REVIEW THE ENTIRE ANNUAL REPORT FOR ERRORS AND CORRECT THEM BEFORE TRANSCRIBING TO THE ORIGINAL.

WHEN THE REPORT IS FINALLY READY, PLEASE MAKE TWO (2) COPIES OF THE REPORT; RETAIN ONE ON FILE, SEND ONE TO YOUR STATE CONFERENCE OFFICE AND SEND THE DULY SIGNED ORIGINAL BY CERTIFIED MAIL TO THE FINANCE DEPARTMENT OF THE NATIONAL OFFICE FOR PROCESSING.

**SHORT FORM
FINANCE DEPARTMENT
NATIONAL ASSOCIATION FOR THE ADVANCEMENT OF COLORED PEOPLE
4805 MOUNT HOPE DRIVE, BALTIMORE, MARYLAND 21215 TEL #410-580-5777**

**2008 ANNUAL FINANCIAL REPORT
(Must be filed with National Office by March 1, 2009)**

REGION I	REGION II	REGION III	REGION IV	REGION V	REGION VI	REGION VII

Unit Name (Branch, Youth and Young Adult Council, College Chapter or State Conference) _____

Federal Identification Number _____ Unit Number _____
 (* DO NOT USE FEDERAL IDENTIFICATION NUMBER OF NATIONAL OFFICE)

Unit Address _____

City _____ State _____ Zip Code _____

Please attach a listing of all bank accounts maintained by the Unit with copies of all bank statements for the period 1/1/08 through 12/31/08.

(PLEASE READ CAREFULLY)

The _____ Branch, Youth and Young Adult Council, College Chapter or State Conference of the National Association for the Advancement of Colored People, hereby requests and authorizes the National Office of the NAACP to include the income and expenses of the Unit for calendar year 2008 in the Annual Group Return of all chartered Units of the NAACP, filed by the National Office.

We hereby declare under penalties of perjury that the 2008 Annual Financial Report has been examined by us and to the best of our knowledge and belief is true, correct and complete and made in good faith.

We hereby authorize the National Office of the NAACP to obtain copies of all bank statements canceled checks and bank signatory cards for all bank account and accounts associated with the aforementioned Unit of the NAACP. We further authorize the National Office of the NAACP to designate personnel as necessary to obtain the aforementioned documentation.

President's Signature

Treasurer's Signature

Print Name

Print Name

Address

Address

City, State/Zip Code

City, State/Zip Code

() _____
Telephone Number

() _____
Telephone Number

IMPORTANT NOTICE:

Please complete all sections as required. Any part which is not complete will cause the Unit's Annual Financial Report to be returned to the Unit. If you have any questions about this form, please call (410) 580-5777.

SHORT FORM

NAACP (GROUP RETURN)
ANNUAL FINANCIAL REPORT

UNIT NUMBER

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PART I INCOME - REPORT ALL INCOME AS GROSS AMOUNTS

FISCAL YEAR

2008

MEMBERSHIP

1	Corporate	\$	
2	Life (all types)	\$	
3	Regular	\$	
4	Youth	\$	
5	WIN	\$	
6	Refund from National Office	\$	
7	Total Membership Income (Add lines 1 through 7)	\$	-

**** (Must Complete this Question) ****

TOTAL MEMBERSHIP @ DECEMBER 31, 2008

PART II FUNCTIONAL / OTHER EXPENSES - REPORT ALL EXPENSES PAID FROM UNIT TREASURY

8	Facility Rent	\$	
9	Utilities	\$	
10	Office Supplies	\$	
11	Post Office Box Rent	\$	
12	Postage/Stamps/Messenger/Shipping	\$	
13	Telephone/Message Service/Internet	\$	
14	Printing/Publications/Subscriptions	\$	
15	Membership dues remittances to National Office	\$	
16	Bank Service Charges	\$	
17	Membership Drive	\$	
18	Community Service	\$	
19	Scholarship Expense(s)	\$	
20	Miscellaneous Expenses (List Below)	\$	
21	Total Expenses (Add lines 1 through 13)	\$	-

SHORT FORM
PART III NET ASSET - FUND BALANCE ANALYSIS

22 Cash Balance on Hand at December 31, 2007

\$

(There must be an entry on this line, please check your 2007 Annual Financial Report for this amount)

ADD :

23 Annual Financial Report Income (ENTER Part I Line 7)

\$

SUBTRACT:

24 TOTAL EXPENSES (Enter Part II Line 21)

\$

25 NET INCOME/(LOSS) FOR 2008 (please subtract line 24 from line 23 above)

\$

26 Cash Balance on hand at Dec. 31, 2008 (Add Lines 22 and 25 of this page)

\$

***PLEASE ATTACH A COPY OF ALL BANK STATEMENTS FOR THE PERIOD 01/01/08 - 12/31/08.**

IMPORTANT NOTICE

PLEASE TAKE A FEW MINUTES TO REVIEW THE ENTIRE REPORT BEFORE SENDING IT TO THE NATIONAL OFFICE.
IF YOU HAVE QUESTIONS, PLEASE FEEL FREE TO CALL (410) 580-5777.