

Form 990EZ Cheat Sheet

Appropriate for use with the 2013-2023 990-EZ

The following are suggestions only. Please check with a tax professional for definitive answers.

REVENUE EXAMPLES (Income Related)

Line 1

Contributions, Gifts, Grants, and Similar Amounts Received

Walkathons	BoxTops
Jogathons	Gifts
Recycling	Grants

Line 2

Program Service Revenue Including Government Fees and Contracts

Speakers	Safety Helmets
ID Bracelets	Disaster Supplies
Book Fairs	Tuition

Line 3

Membership Dues and Assessments

Membership Dues
Membership Assessments
(only include the portion your local group keeps)

Line 4

Investment Income

Interest
Dividends

Line 5a

Gains From Sale of Assets Other Than Inventory

Investment sales such as real estate
or royalty interests

Line 6a

Gaming

Raffles	Bingo
Casino Nights	

Line 6b

Fundraising Events

Gift Wrap	Dinners
Candy	Ice Cream Socials
Carnivals	Auctions

Line 7a

Sales of Inventory

School Store	Merchandise
Spirit Wear	Logo Items
Concessions	

Line 8

Other Revenue

Any Other Income
Add'l NSF Check Fees Charged by your group

EXPENSE EXAMPLES (Expense Related)

Line 5b

Cost or Other Basis and Sales Expenses

Costs associated with sale of real estate

Line 6c

Direct Expenses from Gaming and Fundraising Events

Gift Wrap	Dinners
Candy	Ice Cream Socials
Carnivals	Auctions
Raffles	

Line 7b

Cost of Goods Sold in Line 7a

School Store	Merchandise
Spirit Wear	Logo Items
Concessions	

Line 10

Grants and Similar Amounts Paid

Fees to PTA	Scholarships
Grants	Awards
Classroom Supplies	Teacher Appreciation

Line 12

Salaries, Other Compensation & Employee Benefits

Salaries	Wages
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Line 13

Professional Fees and Other Payments to Independent Contractors

Accounting	Auditing
Legal	1099 Recipients

Line 14

Occupancy, Rent, Utilities, and Maintenance

Rent	Lights
Heat	Other Utilities
Power	

Line 15

Printing, Publications, Postage & Shipping

Printed Newsletters	Postage
Outside Mailing Svcs	Shipping

Line 16

Other Expenses

Grants to School District
Insurance
Program Service Expenses
Travel & Transportation
Training / Convention
All Other Expenses



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