

Form 990EZ Cheat Sheet

Appropriate for use with the 2013-2022 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 |
| Book Fairs | Disaster Supplies |
| ID Bracelets | |

Line 3

Membership Dues and Assessments Tuition

| |
|------------------------|
| Membership Dues |
| Membership Assessments |

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 |

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 |

Line 12

Salaries, Other Compensation & Employee Benefits

| | |
|----------|-------|
| Salaries | Wages |
|----------|-------|

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 |
| All Other Expenses |



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