

Return of Organization Exempt From Income Tax — sample for 2023

Aging Well Navigator · EIN 00-0000009 · calendar year 2023 · 501(c)(3) public charity (sample)

What this document is

A sample that follows the shape of a Form 990 so that a demonstration website has something real-looking to publish. The organization, the people and every figure are invented; an EIN beginning 00 cannot belong to any real organization. It is not a filing, was never filed, and must not be presented as one. The directory it describes lists invented services.

PART I · SUMMARY

LINE		PRIOR YEAR	CURRENT YEAR
8	Contributions and grants (individuals, a foundation)	—	\$82,000
8	Government grants (county senior-services levy grants; the Area Agency on Aging information-and-assistance contract)	—	\$280,000
11	Other revenue (printing cost-share, interest)	—	\$9,000
12	Total revenue	—	\$371,000
15	Salaries, other compensation, employee benefits (three staff)	—	\$244,000
17	Other expenses (the navigator line and the directory, the office, administration, fundraising)	—	\$116,000
18	Total expenses	—	\$360,000
20	Net assets, beginning of year		\$74,400
22	Net assets, end of year		\$85,400

The county levy grants were 47% of revenue and the Area Agency on Aging contract 28%. Staff were 68% of expenses; the organization runs no service of its own except the navigator line and the directory.

Part IX · Statement of functional expenses — sample for 2023

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	TOTAL PROGRAMMANAGEMENTFUNDRAISING			
Staff — the director, the resource navigator, the outreach coordinator	\$244,000	\$205,000.0	\$29,200.0	\$9,800.0
The navigator line and the directory — phone system, directory software and hosting, printing, mileage for volunteer coordination	\$50,000	\$50,000	—	—
The office — rent, insurance	\$34,000	\$25,500.0	\$8,500.0	—
Administration — bookkeeping, the review, the board	\$21,000	—	\$21,000	—
Fundraising — the spring letter, grant applications, printing	\$11,000	—	—	\$11,000
Total functional expenses	\$360,000			

PART VII · COMPENSATION (SAMPLE)

Three staff: a director, a resource navigator and an outreach coordinator. The nine board members and the 18 volunteer directory checkers are volunteers and receive nothing. Names are omitted from this sample because every person connected with this organization is invented.

Part III · Program service accomplishments — sample for 2023

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MISSION

To keep one directory of help for older adults and caregivers in Fairfield and Pickaway counties current, and to answer the phone when someone does not know where to start.

PROGRAM 1 · THE DIRECTORY

A public directory of services for older adults, sorted by need, with every listing checked by a volunteer on a rota and the date shown. In 2023, 361 listings were verified (one completed call and an updated date each) by 18 volunteer checkers giving 980 hours, and 1,400 printed copies were taken from 14 pick-up points. The organization publishes how each number is counted and makes no outcome claims.

PROGRAM 2 · THE NAVIGATOR LINE

One phone line, Monday to Friday, staffed by the resource navigator, for anyone who does not know which service to call. In 2023 it answered 2,510 calls lasting over one minute. The navigator stays on the line while a caller reaches the official number, and never gives legal, financial or medical advice.

PROGRAM 3 · OUTREACH

Printed directories at libraries, senior centers and clinics; a caregiver checklist; and the online directory with a print view for caregivers.

PUBLIC DISCLOSURE

The three most recent returns and the exemption letter are published on the organization's website and available on request. The organization reports the rule; it does not advise on it.