

OVERVIEW

Susan Woods Nonprofit Solutions helps nonprofit leaders start, fund, manage, and sustain 501(c)(3) nonprofit organizations. This **Contractual Agreement** outlines the tasks Susan Woods (Consultant) uses to complete the **Form 1023: Application for Recognition of Exemption** for initial 501(c)(3) consideration and for reinstatement consideration.

CONTRACTUAL AGREEMENT

This contractual agreement defines the components:

- consultant tasks
- disclaimer statement
- contract dissolution clause
- refund policy
- itemized fees
- fee payment schedule

CONSULTANT TASKS

The Consultant prepares the **Form 1023: Application for Recognition of Exemption** for Clients according to IRS guidelines by either creating or acquiring the documents below.

TIP! Click on the document links below to learn the purpose of each document and to understand the work the Consultant completes on your behalf.

- [Employer Identification Number \(EIN\) Letter](#)
- [Articles of Incorporation](#)
- [Bylaws](#)
- [Narrative Description of Activities](#)
- [Fundraising Activities Description](#)
- [Conflict of Interest Policy](#)
- [Financial Data Statement](#)
- [Form 1023: Application for Recognition of Exemption](#)
- [Applicable Schedule\(s\)](#)

Note: The Consultant completes three drafts of the applicable documents at no additional charge. However, there is an extra **\$20 fee** for each revision after the third one.

Articles of Incorporation Filing

Although not a part of the federal application packet for 501(c)(3) status, the Consultant also completes the application to file the Articles of Incorporation with the Secretary of State Office in the state in which the organization will operate at no additional charge.

Secretary of State Fees

The Secretary of State Office in the state in which you plan to operate your 501(c)(3) nonprofit organization requires that you apply to file the Articles of Incorporation. The application processing fees vary from state to state.

Application Completion Timeline

The Consultant commits to a **20-business-day** turnaround time to complete the application packet after the Client signs the contract and processes the service fee.

If the Client misses a due date to provide feedback on documents, the Consultant cannot commit to being able to resume completing the application immediately because the Consultant organizes application completion timelines in a calendar (or queue) which tracks the due dates of ALL clients. If a Client delays the timeline, then the Consultant will work diligently to add their application back into the queue.

The Consultant does NOT schedule phone consultations on Fridays, Saturdays, or Sundays. However, if feasible, the Consultant does answer e-mails and text messages.

DISCLAIMER

The Consultant cannot guarantee that the Internal Revenue Service (IRS) will award the official **Determination Letter** that denotes 501(c)(3) tax-exempt approval.

The client understands that the IRS Exemption Specialist assigned to process their application makes the final approval or rejection decision. In addition, the Consultant cannot provide an exact timeline in which the IRS will provide a final decision. However, the IRS requests **six months** to complete a preliminary review of the application packet.

ITEMIZED FEES

Susan Woods Service Fee	\$1,500
Form 1023: Application Processing Fee	\$600
Secretary of State Fees	Vary

REFUND POLICY

The Client will receive a full refund of the service fee five business days after Consultant receives upon request for any reason. The Consultant does not provide refunds if the IRS does not approve the application. The Consultant dissolves the contractual agreement and refunds the service fee if the Consultant determines that the intent of the nonprofit organization does not fall within the guidelines of one of eight IRS purposes.

CONSULTANT COMMITMENT

The Consultant commits to completing all of the tasks listed on Page 1 under “Consultant Tasks” and commits to the terms and conditions defined in this Contractual Agreement.

SIGNATURE OF AGREEMENT

If you agree to the terms and conditions of this **Contractual Agreement**, please process the **\$1,500** service fee using the **PayPal** link below. The payment serves as your **Signature of Agreement** to the terms and conditions of this Contractual Agreement.

Important! Call Susan Woods at **704-968-2769** if you have questions **before** paying.

[Process \\$1,500 Payment >>](#)