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This Box For Office Use Only

CHARITABLE TRUST SUPPLEMENTAL AMENDMENT

All fields **REQUIRED** unless otherwise specified

(1) CURRENT ORGANIZATION INFORMATION

Registration Number: _____ FEIN: _____

Organization Name: _____

(2A/B/C) ORGANIZATION'S ACCOUNTING AND FINANCIAL FIGURE INFORMATION

2. A Does the organization need to change the First Accounting Year End Date and/or Beginning Gross Asset that were reported on the initial Registration form? **(Check one)** Yes No **If No**, please continue to 2.B
If Yes, 2.A will need to be completed on page 2 and included with this page in the upload.

2. B Has the organization's accounting year changed? **(Check one)** Yes No **If No**, continue to 2.C
If Yes, 2.B will need to be completed on Page 2 and included with this page in the upload, the organization's short report is required when changing the accounting year.

2. C Does the organization need to amend any previously recorded financial figures? **(Check one)** Yes No
If Yes, 2.C will need to be completed on Page 3 and included with this page in the upload

(3) SIGNATURE

By executing this document, the applicant certifies the following:

- He/she is authorized to represent the above named organization.
- The information contained herein is accurate and true to the best of the applicant's knowledge.

Signature of Applicant

Printed Name / Title

Date

Contact phone number: _____

Registration Number: _____

2.A/B Continued

2. A Continued: If Yes was checked on page 1 for question 2.A please provide the new Accounting year end date and/or the beginning gross assets.

First Full Accounting Year End Date: _____ (mm/dd/yyyy)

Beginning Gross Assets: _____

2. B Continued

NEW ACCOUNTING YEAR FOR THE ORGANIZATION

If changing the accounting year, please provide the new accounting year as well as the effective date of change. Include a fiscal short report, showing the organization's financial information from the short accounting year. Financial information should show figures from the previous accounting year end date to the new accounting year begin date. This is to ensure there are no financial gaps on record.

If no change, **DO NOT** complete the below fields and continue to the next page.

New Accounting Year Beginning Date: _____ (mm/dd/yyyy)

New Accounting Year Ending Date: _____ (mm/dd/yyyy)

Effective date of fiscal year change: _____ (mm/dd/yyyy)

Example for New accounting year and short report:

- 1) If the short report is 1/1/2022—6/30/2022 then the new accounting year would be reflected as 7/1/2022—6/30/2023.
- 2) If the short report is 4/1/2022—12/31/2022 then the new account year would be reflected as 1/1/2023—12/31/2023.

FINANCIAL REPORT FOR THE ORGANIZATION'S SHORT ACCOUNTING YEAR

ALL financial fields must be completed, enter zero if the organization does not have any financial information to report for a specific line.

Select the type of tax return that was filed for the amended fiscal year. A copy of the tax form indicated **must** be uploaded with this document. (Check one) 990 990EZ 990PF 990N Other: _____

Organization's Short Report **Beginning** Date

Organization's Short Report **Ending** Date

(mm/dd/yyyy)

(mm/dd/yyyy)

1. Beginning Gross Assets: \$ _____

2. Total Revenue: \$ _____

3. Grants, Contributions and Program Services: \$ _____

4. Compensation of officers/directors/trustees: \$ _____

5. Total Expenses: \$ _____

6. Ending Gross Assets: \$ _____

Registration Number: _____

2.C Continued

AMENDED FINANCIAL INFORMATION FOR ORGANIZATION

Provide the fiscal year dates and **all** financial figures from the fiscal year, whether the information is amended or not. If the organization wishes to amend multiple years, additional sheets **must** be enclosed. Please make multiple copies of this page or follow the same structure as shown below. This will ensure that no errors are made when amending your financial figures.

ALL financial fields must be completed, enter zero if the organization does not have any financial information to report for a specific line. The organization's 990 or other tax form for the fiscal year being amended **must** be uploaded.

An amended accounting year must be financial information that has previously been recorded with our office

AMENDED ACCOUNTING YEAR

Organization's Accounting Year Begin Date and End Date for financial figures to be amended

Beginning Year Date _____ **Ending Year Date** _____
(mm/dd/yyyy) (mm/dd/yyyy)

1. Beginning Gross Assets: \$ _____

2. Total Revenue: \$ _____

3. Grants, Contributions and Program Services: \$ _____

4. Compensation of officers/directors/trustees: \$ _____

5. Total Expenses: \$ _____

6. Ending Gross Assets: \$ _____

Does the Organization need to make changes to another previous year's reported financial information?

(Check one) Yes No If Yes, attach additional pages in the same format as above.
