



**Please complete this form and return with all the necessary documents by February 15<sup>th</sup>. The purpose of this form is to ensure that your unit is meeting the requirements necessary to maintain your 501(c)(3) non-profit status.**

## Annual Unit In Good Standing Report

Please mail this report **BY NO LATER THAN FEBRUARY 15TH** to:

Hawaii State PTSA – Treasurer  
PO Box 459, Pearl City, HI 96782

Please be aware that this report:

- Contains information that must be submitted to the IRS with our annual filing on March 31<sup>st</sup>
- Must be completed & returned to the Hawaii State PTSA in order to remain a “Unit in Good Standing” and to avoid termination of services on March 31<sup>st</sup> and possible revocation of your 501(c)(3) tax-exempt status

*Please type or print legibly:*

Local Unit Name: \_\_\_\_\_

School Name: \_\_\_\_\_

Mailing address (include city and zip code): \_\_\_\_\_

Name & Title of Person Completing This Form: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

National PTA ID No.: \_\_\_\_\_ Region: \_\_\_\_\_

Federal ID number: \_\_\_\_\_ General Excise Number: W \_\_\_\_\_

Date Your Unit Bylaws Were Last Reviewed: \_\_\_\_\_ Last Updated: \_\_\_\_\_

What did your unit charge for membership dues? This year: \$ \_\_\_\_\_ Last Year: \$ \_\_\_\_\_

What is your fiscal end of year date? \_\_\_\_\_

Total Gross Receipts: This Year-to-Date: \$ \_\_\_\_\_ Last Year: \$ \_\_\_\_\_

Please ESTIMATE the total number of PTA volunteer hours for your unit last year: \_\_\_\_\_

### **The following attachments MUST accompany this report to be complete:**

- Copy of your **current year** fiscal budget:
- Copy of your **prior year** financial audit, audit committee report, year-end statement
- Copy of your **prior year** annual IRS form 990 or confirmation of 990-N postcard filing. (If your prior year 990 filing is not yet complete, please provide a copy of a valid extension filed with the Internal Revenue Service.) Be sure “gross receipts” are shown above.
- A copy of your most recent Hawaii General Excise Tax filing (Form G-45)
- An updated and current copy of your local unit board of directors & officers roster as of this filing

*[If you have questions regarding completing this form, please email: [histateptsa@gmail.com](mailto:histateptsa@gmail.com).]*