



Tax Planning and Compliance for Tax-Exempt Organizations: Rules, Checklists, Procedures

By Jody Blazek



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An essential, timesaving guide for accountants, lawyers, nonprofit executives and directors, consultants, and volunteers

This book is an indispensable guide to navigating the complex maze of nonprofit tax rules and regulations. A clear and fully cited description of the requirements for the various categories of tax-exempt entities from public charities, private foundations, civic associations, business leagues, and social clubs to title-holding companies and governmental entities can be found. Practical guidance on potential for income tax on revenue-producing enterprises along with explanations of many exceptions to taxability is provided. Issues raised by Internet activity, advertising, publishing, providing services, and much more are explained.

This useful guide covers the many significant issues facing nonprofit organizations, including compensation and possible private inurement, affiliation, separations and mergers, donor disclosures, lobbying and electioneering, and employment taxes.

- Offers a supplemental, annual update to keep subscribers current on relevant changes in IRS forms, requirements, and related tax procedures
- Includes easy-to-use checklists highlighting such critical concerns as tax-exempt eligibility, reporting to the IRS, and comprehensive tax compliance issues
- Features a variety of sample documents for private foundations, including penalty abatement requests and sharing space agreements
- Provides helpful practice aids, such as a comparison of the differences between public and private charities, charts reflecting lobbying limits for different types of entities, and listings of rulings and cases that illustrate permissible activity for each type of organizations compared to impermissible activity

Filled with practical tips and suggestions for handling such critical situations as preparing for and surviving an IRS examination, *Tax Planning and Compliance for Tax-Exempt Organizations, Fifth Edition* provides guidance for the significant issues facing nonprofit organizations.

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Editorial Review

From the Back Cover

**Praise for tax planning and compliance for tax-exempt organizations, fifth edition
Rules, Checklists, Procedures**

"I have been referencing Tax Planning and Compliance for Tax-Exempt Organizations for over ten years and have found it to be one of the most useful and practical guides in publication today. This treatise is so useful because it unravels complex concepts, routinely explaining them in plain and direct language. This latest edition is the best one ever, taking into account important regulatory and legislative changes and offering essential guidance to the tax-exempt practitioner."

—**Jeffrey D. Haskell**, Chief Legal Officer, Foundation Source

"The Fifth Edition of *Tax Planning and Compliance for Tax-Exempt Organizations* is a treasure trove of practical information, wonderfully organized and exhaustive in scope. A 'must' for the libraries of nonprofit managers and advisors of exempt organizations!"

—**Eve Borenstein**, Principal, Borenstein & McVeigh Law Office (formerly, Tax Exempt Law Office of Eve Rose Borenstein)

An essential, timesaving guide to navigating the complex maze of nonprofit tax rules and regulations

Written by notable nonprofit tax expert Jody Blazek, the Fifth Edition features:

- An annual update to keep subscribers up to date on relevant changes in IRS policies, new IRS rulings, court decisions, and related issues to assure tax-exemption can be retained
- Easy-to-use checklists highlighting such critical concerns as tax-exempt eligibility, unrelated business income tax, proving reasonable compensation, use of Internet, reporting changes to IRS, and other compliance issues
- A variety of sample documents, including requests for penalty abatement, scholarship plan approval, and grant agreements
- Helpful practice aids, charts comparing public and private charitable organizations, PFs vs. DAFs vs. SOS, commercial vs. related activities, and factors to identify an employee vs. independent contractor

Filled with practical tips and suggestions for advising private foundations and handling such critical situations as preparing for and surviving an IRS examination, *Tax Planning and Compliance for Tax-Exempt Organizations*, Fifth Edition provides guidance for the significant issues facing nonprofit organizations.

As a bonus, when you purchase the print version of this Fifth Edition, you will also receive a free e-book download of *Tax Planning and Compliance for Tax-Exempt Organizations*, Fifth Edition. For details, see the inside back cover of this book.

About the Author

Jody Blazek is a partner in Blazek & Vetterling, a CPA firm focusing on tax and financial planning for exempt organizations and the individuals who create, fund, and work with them. She is the author of six books in the Wiley Nonprofit Series and served on the Panel on the Nonprofit Sector's Transparency and Financial Accountability Work Group. She is former chair and a member of Form 1023 and 990 Revision

Task Forces for the American Institute of Certified Public Accountants (AICPA).

Amanda Adams is a partner in Blazek & Vetterling. She has coauthored (with Jody Blazek) *Revised Form 990: A Line-by-Line Preparation Guide* (Wiley). She is an associate member of the AICPA's Exempt Organizations Tax Technical Resource Panel. She has a wealth of knowledge about the impact of partnerships, hedge funds, and other alternative investments owned by nonprofits, private foundations, and supporting organizations.

Users Review

From reader reviews:

Eleanor Yoo:

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