



4-H

WASHINGTON STATE UNIVERSITY  
EXTENSION

## New Club/Group/Council/ Other Authorized Unit\* Financial Identity Checklist and End of Year Tasks

\*The term "Club" will be used throughout to represent Club/Group/Council/Other Authorized Unit.

- ☐ Club determines if they would like to maintain a treasury and accept donations.

If no, no further action is needed. If yes, continue.

- ☐ Club makes and approves a motion to include their organization into the Washington State 4-H Group Exemption with the Internal Revenue Service (IRS).
- ☐ Club President and Club Leader complete and sign the "Authorization to Include 4-H Club or Affiliate in WSU 4-H Youth Development Group Exemption Number."
- ☐ Club Leader obtains an Employer Identification Number (EIN) for the club.
- ☐ Club Leader completes "4-H Financial Management" and prints completion certificate.
- ☐ Club Treasurer completes "4-H Financial Management" and prints completion certificate.
- ☐ Club Treasurer submits the following items to the County Extension Office:
  - ☐ Club Constitution/By-Laws
  - ☐ Minutes from meeting reflect vote on inclusion in group exemption
  - ☐ Authorization to Include 4-H Club.... Form
  - ☐ EIN Confirmation Letter from IRS
  - ☐ Certificates of completion (Leader and Treasurer) of 4-H Financial Management

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The following tasks are completed each year following the end of the 4-H Year (September 30):

- ☐ Club determines which process to use for auditing their financial accounts.
- ☐ Audit is implemented and an audit report is submitted to the club treasurer.
- ☐ Club Treasurer completes the Annual Financial Summary.
- ☐ Club Leader submits the Annual Financial Summary, Audit Report, and Property Inventory Form to the County Extension Office by December 1 of each 4-H year.



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## Established Club/Group/Council/ Other Authorized Unit\* Financial Identity Checklist and End of Year Tasks

- ☐ Club Leader completes “4–H Financial Management” and prints completion certificate.
- ☐ Club Treasurer completes “4–H Financial Management” and prints completion certificate.
- ☐ Club determines which process to use for auditing their financial accounts.
- ☐ Audit is implemented and an audit report is submitted to the club treasurer.
- ☐ Club Treasurer completes the Annual Financial Summary.
- ☐ Club Leader submits the Annual Financial Summary, Audit Report, and Property Inventory Form to the County Extension Office by December 1 of each 4–H year.

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