



# END-OF-YEAR CHECKLIST

The end of the year is an important time for every nonprofit. Whether it's tax filings or holiday parties, there are a multitude of things to get right before you ring in the new year.

We put together this infographic based on Gusto's end-of-year checklist to help your organization—and your employees—get ready for next year.



## VERIFY EMPLOYEE DATA



- .. Verify Employee Name
- .. Verify Employee Address
- .. Verify Employee Social Security Number
- .. File W-2 (Gusto does this for you!)



## VERIFY EMPLOYEE BENEFIT INFORMATION



- .. Confirm retirement plan eligibility
- .. Confirm health benefits (and imputed wages)
- .. Confirm fringe benefits. Examples include:
  - A. Personal use of company car
  - B. Employer-provided parking
  - C. Employer-provided cell phones
- .. Review sick time
- .. Review vacation time
- .. Review deferred compensation
- .. Verify housing allowance for church pastoral staff



## VERIFY CONTRACTOR INFORMATION



- .. Verify Contractor Name
- .. Verify Contractor Address
- .. Verify Contractor Identification Number
- .. File 1099 (Gusto does this for you!)



## END-OF-YEAR EXTRAS



- .. Grant year-end bonuses (if any)
- .. Appreciate your team!

