

**SAMPLE RECORDKEEPING CHECKLIST FOR 501(C)(3) QUALIFIED DISASTER
RELIEF PAYMENTS**

Important Note: This is a sample document prepared by the Sustainable Economies Law Center (www.theselc.org). This form is a sample for informational purposes only and shall not be construed as legal advice. Legal advice must be tailored to the specific circumstances of each case and laws are constantly changing.

Updated: August 2020.

Recordkeeping Checklist

Project background:

Name of project:

Description of project: (purpose and planned activities)

Purpose for giving aid: (i.e. providing financial assistance to those who were laid off as a result of COVID-19)

Who is approving the aid: (the composition of the selection committee approving the assistance)

Description of the objective criteria for who gets aid: (i.e. they must live in this geographic area and currently have income insufficient to meet their basic needs)

Additional information regarding how recipients were selected: (i.e. was there an application?)

Costs associated with providing the assistance: (i.e. gas for the volunteers, paying for food, etc.)

Information about recipients:

Name:

Address:

Amount / Item Received:

Relationship to the Organization: (record any relationship between a recipient and the organization or its officers, directors, key employees, or substantial contributors)