



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 2019.



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!

