CLIENT CHECKLIST · SERVICE 7 OF 7

Grant Readiness (Go / No-Go) and Grant Writing for Nonprofits

An honest answer on whether your nonprofit is ready for a grant, then help writing it.

What this service is

- ✓ Go / no-go review: we check if your nonprofit is ready to apply, and if a grant is a good fit. You get a written go or no-go answer and a to-do list.
- ✓ Foundation write-up: letters of inquiry and proposals for private and community foundations.
- ✓ Federal / HUD grant packages: we help prepare the narrative, budget, and attachments for federal grant applications, including HUD programs.
- ✓ Your own authorized official submits the application.
- ✓ We charge for the work. We never take a cut or a percentage of your award.

What this service is not

- ✕ It is not a promise of funding. Funders make their own choices.
- ✕ We never put false or stretched information in an application.
- ✕ We are not HUD-approved, and we have no special access to HUD or any funder.
- ✕ Many grants can't be used to pay for grant writing. Plan to pay from other funds. Ask the funder if you are not sure.
- ✕ No guarantees. No one can promise a credit score, a deletion, a loan, or a grant. We won't either.
- ✕ We do not remove correct information. We only dispute items that look wrong, incomplete, out of date, or that can't be verified.
- ✕ No CPNs (“credit privacy numbers”) and no “new credit identity.” A CPN is not a legal stand-in for your Social Security number.
- ✕ No tradelines and no piggybacking. We don't sell or arrange spots on a stranger's credit card.
- ✕ We never ask for your bank, card, or credit bureau logins or passwords.

What to gather before we start

Check each box as you find it. Bring these to your meeting or show them to us. You keep your papers.

Legal and tax papers

- ☐ IRS 501(c)(3) determination letter.
- ☐ EIN letter from the IRS.
- ☐ Articles of Incorporation (Certificate of Formation) and Bylaws.
- ☐ Your last 2 to 3 IRS Form 990s.

- ☐ Texas Comptroller franchise tax status or exemption letter.

People

- ☐ Board list: names, roles, and term dates. No personal ID numbers.
- ☐ Short bios for key staff and leaders.
- ☐ Conflict of interest policy and other board policies.

Money

- ☐ This year's organization budget.
- ☐ A budget for the program you want funded.
- ☐ Your latest financial statements or audit.
- ☐ Your indirect cost rate agreement, if you have one.

Programs and results

- ☐ Your mission statement.
- ☐ A short description of each program.
- ☐ Numbers served and results you have tracked.
- ☐ Letters of support or partner agreements (MOUs).
- ☐ Reports from past grants, if any.
- ☐ The grant notice or guidelines you want to apply for.

Federal / HUD grants, also check

- ☐ Your SAM.gov status is active, and you know your UEI number.
- ☐ You have a Grants.gov account and know who your authorized official is. Keep your logins private. Don't share them with us.

Keep your private info private

- ! You pull your own credit reports, free, at AnnualCreditReport.com. You keep them.
- ! Keep account numbers private. On any copy you share, cover all but the last 4 digits.
- ! Do not write your Social Security number, date of birth, bank logins, or account numbers on this checklist.
- ! Do not email your Social Security number, date of birth, bank logins, passwords, or full account numbers. Bring papers to your meeting or show them to us on screen. Ask us for a safer way to share if you need one.
- ! This checklist is yours. Check items off as you gather them. You keep the originals.

What happens, step by step

1. **Free consult.** We talk about your nonprofit and the grants you have in mind.
2. **Written agreement.** You get a written agreement: go / no-go review, grant writing, or both.
3. **Sign, then 3 days to cancel.** Our agreements give you 3 business days to cancel. Work starts after that.
4. **Readiness review.** We review your papers, programs, and the grant rules.
5. **Go or no-go.** You get a written answer and a to-do list. A “no-go” saves you time and money.
6. **Writing.** If it's a go, we draft the narrative, budget story, and attachments list.
7. **Your review.** Your team reviews and approves every word and number.
8. **You submit.** Your authorized official submits the application by the deadline.
9. **Follow-up.** We help with funder questions and plan your reports or next grant.

This is a nonprofit service

- This is a service for your nonprofit organization. It is not a consumer credit service.
- If any part of the work ever involves someone's personal (consumer) credit, the consumer credit rules apply to that part: a written contract, 3 business days to cancel, and no charge until that work is fully performed.

Read more about your rights: https://topshelffundability.com/consumer-rights

Pricing

- Pricing is quoted in writing after your free consult.

Questions? Call 910-978-1173 or email info@topshelffundability.com.