



American Legion Auxiliary
Department of California

2024-2025 Unit Checklist

This checklist is for the Unit or District to track their submissions. The items listed below have other forms that are required to be sent in.

Forms/Checks Due to Department Office (except where noted)	Date Due	Date Sent	Check Number	Amount of Check
Monthly Mailings in paper form \$50 or Email	9/30/24			
<u>Unit</u> Fidelity Bond (3yr premium) \$15.00 Due 2026 Mandatory	9/30/26			
Poppy Order Mandatory	10/1/24			
Girls State Reservation	10/1/24			
ALAMIS Logon Fee	11/30/24			
Girls State Application and Fees	Dept Treasurer 3/31/25			
Unit Data Form (Where to send Dues, Amount) Mandatory	4/30/25			
Membership for Book of Reports	5/6/25			
Donations for Book of Reports	Dept Treasurer 5/6/25			
Delegate/Alternate Certification & Fees Convention Mandatory	5/9/25			
Certification of Unit/District Officers Mandatory	Immediately after Election			
Poppy Financial Report Mandatory	6/2/25			
MANDATORY AUDIT & TAX FORMS: COPIES DUE TO DISTRICT PRESIDENT NLT 9/30/24				Date Sent
<input type="checkbox"/> Unit Audit Report NLT 9/30/24 (signed by Unit President and all members of Audit Committee)				
<input type="checkbox"/> IRS 990N e-postcard or other 990 long forms required for all units NLT 9/30/24 <input type="checkbox"/> CA FTB 199N e-postcard or 199 long forms required for all units NLT 9/30/24 <input type="checkbox"/> Attorney General Registry of Charitable Trusts RRF-1 required for all units NLT 9/30/24 <input type="checkbox"/> Attorney General Registry of Charitable Trusts CT-TR-1 required for all units NLT 9/30/24 Note: The AG CT-TR-1 instructions state on the form that “special events” are one-time events (not your annual or ongoing events and fundraisers, which should be put on their form under program income).				

District Presidents please forward Audits and Tax Documents to the Department Office No Later than October 30th.