

NOT-FOR-PROFIT ORGANIZATIONS

WE HELP YOU HELP OTHERS.

When you exist for the purpose of enriching the lives of others, meeting your financial objectives is vital to your mission. Our not-for-profit team recognizes your commitment and takes the steps necessary for you to achieve it. Our work with educational institutions, health and wellness providers, social service agencies, philanthropic foundations and civic organizations has fostered the development of cash management, operations and funding strategies that we can apply to your organization's benefit.

INDUSTRY-BASED SERVICES & CONSULTING

- preparation of 990
- budgeting & cash flow analysis
- unrelated business income tax strategies
- governance & board composition consulting
- fundraising & strategic planning
- obtaining & maintaining tax exempt status
- functional expense classification
- cash management & specialized fund accounting
- internal controls documentation & testing

BUSINESS EVOLUTION CONSULTING

- succession planning
- business valuation
- business advisory boards
- mergers & acquisitions
- expansion & growth financing
- buy sell agreements
- global outsource consulting
- business health checkups

INFORMATION TECHNOLOGY SOLUTIONS

- ERP / business management software solutions
- custom application development
- Smart Shelter security systems
- technology assessment services

CORE ACCOUNTING SERVICES

- entity formation and registration
- accounting & payroll services
- monthly, quarterly and annual closing assistance
- depreciation / cost segregation studies
- financial statements: compilation, review & audit
- pre year-end tax planning
- tax compliance: federal, state & local
- corporate tax research & planning
- international tax planning

OWNER SERVICES

- personal tax planning and preparation
- estate and financial planning
- education funding analysis
- insurance & long term care analysis
- investment portfolio performance reviews

EMPLOYEE SERVICES

- health / benefit plan design
- retirement plan design
- third party plan administration
- incentive / performance based compensation plans