



Every engagement involving a not-for-profit entity is handled by our Not-For-Profit Services Group specialists, who take pride in knowing your specific needs as well as the general needs and requirements of the not-for-profit environment. We manage each engagement by selecting individuals with the appropriate levels of knowledge and experience, allowing us to be as cost-effective as possible. Our services assist management and the board in meeting their fiduciary responsibilities for accountability, protecting and allocating the organization's resources efficiently, and installing confidence, trust, and fiscal integrity.

We serve a wide variety of clients, including human service organizations such as research foundations, workshops, family services, hostels, health services, camps and clubs, religious organizations, PACs, membership associations, unions, schools, colleges, arts organizations, trusts and foundations, and social welfare organizations.

Our services include:

- Financial audits, OMB Circular A-133 Single Audits, program and grant audits
- Tax planning and compliance
- Financial reporting (GAAP and for use by Boards and management)
- Management information systems
- Fiscal management
- Audits and preparation assistance of Consolidated Fiscal Reports (CFR)
- Bookkeeping procedures, system development, implementation and training
- Accounting systems, procedure manuals, personnel training
- Human resources
- Employee benefits analysis, plan design, implementation and administration
- Rate studies and reviews
- Fraud audits
- Review and test of internal controls
- Records reconstruction
- Feasibility studies
- Financing alternatives (including negotiation with lenders)
- Annual budget preparation
- Incorporations of exempt organizations
- IRS 990/990T, NYS annual financial report form CHAR 500
- Indirect cost rate and cost allocation plans (OMB A-122, A-87, HHS OASC-10)
- Creation of for-profit subsidiaries
- Cash flow forecasting/investing
- Strategic planning and budgeting
- Purchase/lease decisions
- Grant administration
- Recruit/identify candidates for financial positions

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