

Looking to increase membership? Limit your tax exposure? Provide greater transparency? We can help. BKD National Not-for-Profit Team works with hundreds of trade groups, professional associations and fraternal and alumni organizations to facilitate membership growth, develop operational efficiencies and increase financial accountability. Let us show you how our insight can benefit your organization.

Financial Accountability

Sound financial management requires fiscal discipline and the development of meaningful financial statements and reports that demonstrate accountability. Our advisors can help you:

- Develop policies and procedures to demonstrate corporate responsibility and accountability
- Produce meaningful financial statements and management reports
- Assist with internal audits
- Implement governance best practices
- Strengthen internal controls
- Improve utilization and tracking of restricted resources
- Design strategies for improving profitability of various programs and cost allocation plans to measure their profitability
- Analyze and forecast cash flows
- Perform feasibility studies, financial projections and operational reviews
- Create budgets and business plans aligned with strategic priorities
- Provide benchmarking comparisons
- Explore financing alternatives

Tax Risks & Opportunities

BKD provides a wide variety of tax compliance and consulting services that help membership organizations manage their risks and take advantage of opportunities, such as:

- Performing comprehensive diagnostic reviews in various areas, including fringe benefits, unrelated business income tax, retirement plans, executive compensation and private investment issues
- Assisting with private letter ruling requests and IRS/state examinations
- Preparing Form 5500
- Monitoring exempt function activities, nonmember usage and the use of set asides to reduce taxes on net investment income
- Analyzing key tax issues and benchmarking information on annual Form 990 or 990-PF
- Preparing and/or reviewing tax returns
- Assisting with international tax issues for foreign operations and investments

Attract & Retain Members

Members are the lifeblood of your organization, and membership dues are a significant revenue source for your programs and services. That's why making sure your organization provides value to existing and potential members is so important. We can help:

- Develop and analyze membership dues structure
- Create membership tracking reports to better manage data
- Survey members for feedback and summarize results

Experience ideas from a firm that works with approximately 250 membership organizations and has professionals trained in the industry.

250 clients



“We are very pleased with the dialogue we engage in during audit committee meetings as well as the detail of the audit and audit recommendations. . . . They really understand the not-for-profit world. This is a real strength of BKD.”

—Dr. Larry D. Case, CEO

National FFA Organization and National FFA Foundation

- Formulate action plans to provide programs your members expect
- Strengthen member loyalty through effective communication

Outsourcing

Is your organization’s accounting department short-staffed? We’re here to help. Our advisors can step in on a temporary or permanent basis to help with day-to-day accounting functions while you focus on running your organization.



We can help:

- Perform basic bookkeeping functions
- Process transactions
- Fill temporary/interim staffing vacancies
- Complete special projects
- Train staff

For More Information

For a complete list of our offices and subsidiaries, visit bkd.com or contact:

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With a partner-to-staff ratio much lower than the 1-to-9 average found in other top firms, you'll have access to partners and
experience personal communication.

partner
1.5
staff



HOW DOES OUR EXPERIENCE RELATE TO YOU?

- Perform audits
- Prepare tax returns
- Evaluate cash management
- Improve operational efficiency
- Analyze & allocate costs
- Implement information technology
- Manage tax exposure
- Develop best practices
- Demonstrate financial accountability