

responsive

Alpern Rosenthal

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Certified Public Accountants and Business Advisors

creative

*What Distinguishes Alpern Rosenthal
From the Competition?*

Alpern Rosenthal conducts client satisfaction surveys to measure performance and service quality. The results consistently tell the same story. Our firm excels in:

- Personalized service
- Responsive service
- Specialized industry experience
- Technical proficiency
- Timeliness.

**Client satisfaction is our
foremost concern.**



ALPERN ROSENTHAL

INSPIRING OPPORTUNITIES

Not-for-Profit Services Group



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innovative



d e d i c a t e d



SERVING THE UNIQUE NEEDS OF NOT-FOR-PROFITS

Certified Public Accountants and Business Advisors

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Not-for-Profit Services Group

Alpern Rosenthal is one of the largest certified public accounting and business advisory firms in Western Pennsylvania with a professional group dedicated to serving the unique needs of not-for-profit organizations. Our Not-for-Profit Services Group is deeply committed to serving the organizations that underlie the social, cultural and economic life in Western Pennsylvania.

We partner with organizations across the region to identify and capitalize on business opportunities that drive results. Our seasoned team of accounting, tax, consulting and industry specialists works closely with clients to provide creative yet practical solutions that make a difference to our clients.

Our group is characterized by:

- **A Long Track Record** - The Not-for-Profit Services Group was established in 1990 and currently serves more than 150 not-for-profit clients.
- **Substantial Size** - Twelve senior level professionals are dedicated to working with not-for-profit organizations.
- **Comprehensive Resources** - Our staff includes professionals specializing in accounting and auditing, taxes, business management, marketing and development consulting, employee benefits and information technology consulting.
- **Clear and Frequent Communications** - We take responsibility for clearly communicating with not-for-profit management throughout the year via phone calls, personal meetings and mail correspondence.
- **A Proactive Approach** - We make sure clients are promptly informed of significant new developments in accounting rules, tax laws or other business changes. We help clients assess the potential impact of such developments on their particular organizations and provide strategic, long-term guidance.
- **An Emphasis on Customer Satisfaction** - Our professionals undergo specific not-for-profit technical and business training. This training is focused on the particular business challenges confronting not-for-profit organizations.
- **Value-Added Services** - We offer executive business forums on technical and operational issues affecting not-for-profits.
- **An Understanding that All Not-for-Profits are Not Alike** - Our client list includes arts, community service, foundations, health, historical, membership and social service organizations. We are knowledgeable in the nuances associated with each of these different types of not-for-profit groups.
- **Personal Commitment** - Many of us volunteer our own time to not-for-profit organizations, whether as board members or informal consultants. A sampling of the organizations our personnel are involved with include: March of Dimes, Leukemia Society, Pittsburgh Symphony, Pittsburgh CLO, Pittsburgh Downtown Partnership, Auberle, CASA and the Jewish Community Center.

innovative

At Alpern Rosenthal, we are an innovative firm dedicated to shaping the long-term relationships that have advanced our clients' businesses.

Serving the Unique Needs of Not-for-Profits

Traditional Services

- General accounting and business consultations
- Preparation of financial statements - audits, reviews and compilations
- Tax planning and preparation of tax returns
- Audits in accordance with Government Auditing Standards and OMB A-133

Business Consulting Services

- Internal control reviews
- Charitable estate planning
- Evaluations regarding unrelated business income tax
- Board training
- Fundraising and development consulting
- Marketing communications consulting
- Goals and budgeting
- Assistance in implementation of new Financial Accounting Standards
- Cost allocation plans
- Consulting regarding investment strategy and policy
- Pledges receivable from capital campaigns
- Tax structure planning
- UBTI planning
- Deferred compensation
- Financial oversight policies and procedures



Educational Services

- General accounting and business consultations
- Executive business forums that address business, technical and legal issues facing not-for-profits for management and board members
- Tax updates
- Periodic informational mailings addressing financial, operations and marketing issues for not-for-profit organizations

dedicated

Types of Clients:
Arts
Associations
Community
Development
Educational
Foundations
Health and Welfare
Religious
Social Service

