

Financial Services

Navigating the charitable tax laws, IRS filings, and distribution rules can be confusing to a nonprofit organization or any group wishing to become a nonprofit entity. CenterPoint consultants have years of for-profit and nonprofit accounting and tax experience to help any organization focus more on mission and less on regulatory compliance.

Financial Analysis

Staff CPA and strategic planners will:

- Analyze your organization to determine its financial strengths and weaknesses.
- Define areas for improvement in budgeting, cost control and cash management, and reporting.
- Work closely with other advisors—external accountants, attorneys, financial planners—to ensure accurate and timely reporting.
- Determine whether your existing organization can and should viably become a nonprofit, and help with the complex process of converting and filing for government approval.

Project Administration and Budgeting

With new and ongoing projects we can help you:

- Strategically and financially define and organize a project from inception, through implementation, to completion and evaluation.
- Revamp an existing project to meet or exceed initial objectives. Improve budgeting techniques to closely monitor activities and expectations.

Estate Tax Planning

Let our experience and associations with charitable and estate planning attorneys, CPAs, and financial advisers assist you in your lifelong charitable and philanthropic endeavors and provide you with a means of continuing these endeavors after your lifetime. CenterPoint:

- Provides analysis of or development of a personal and/or family estate plan using planned giving alternatives such as lifetime gifts, testamentary gifts, a standard charitable trust, or a split-interest charitable trust.
- Aids in screening and selecting other knowledgeable charitable activity advisers.

Foundation and Charitable Trust Management

CenterPoint understands the nonprofit, non-government sector. If a foundation or charitable trust organizing structure is appropriate, CenterPoint will help foundation or trust representatives:

- Develop a strategic vision, mission, and operating plan.
- Oversee preparation and compliance of all tax related reporting requirements.
- Develop a personalized grant/donation management system.
- Oversee or directly administer an ongoing grant management system.



CenterPoint Institute
guides for decision makers