

tax welfare foundations audit health investments college accounting nonprofit university private donors

NONPROFIT ASSURANCE, TAX & ADVISORY SERVICES

- Educating future leaders
- Providing job training and life skills to individuals with challenges
- Alleviating hunger and homelessness
- Providing grants to nonprofit organizations to help fulfill their mission
- Developing tourism and economic development opportunities

These are just a few examples of the goals of an increasingly varied and diverse nonprofit industry. Challenges at the federal, state and local government levels have increased the need for nonprofits to address social issues with an ever decreasing level of funding. Economic variations, potential tax law revisions and heightened competition only increase the difficulty of fund-raising initiatives, placing further pressure on an already challenged industry.

In this environment, it is understandable that industry experience has emerged at the top of the list of what nonprofit organizations need and expect from their accountants and advisors. HoganTaylor has a commitment to "Service" written into our organizational values and we have intentionally focused on providing a wide variety of services to nonprofit organizations since our firm was founded. In recent years, we have taken this philosophy a step further by creating a dedicated nonprofit group whose members not only understand the unique aspects of nonprofit organizations, but have developed in-house processes specifically designed to serve our nonprofit clients unique compliance and organizational needs.

HOGANTAYLOR APPROACH

Due to the incredible diversity among nonprofit organizations, increasing changes in financial reporting rules and continued public scrutiny of information included in tax filings you need service providers who understand what makes your nonprofit unique.

- HoganTaylor is a charter member of the American Institute of Certified Public Accountants (AICPA) Governmental Audit Quality Center. Membership is indicative of our commitment to providing quality financial statement and compliance audit services to our nonprofit clients receiving governmental assistance.
- Our dedicated, interdisciplinary team is focused on understanding your needs and expectations and working with your management and Board to best serve your needs.
- Our senior team members attend the AICPA National Nonprofit Conference each year, staying abreast of current issues affecting nonprofits. We conduct in-house training for all levels of our service team to ensure all clients are served by knowledgeable, highly trained personnel. We also regularly lead external trainings for a variety of organizations, to ensure you too have the information you need to be successful.
- We utilize secure portal technology developed specifically by HoganTaylor which allows you and your engagement team to collaborate and communicate on one central platform. This HT-specific solution enables all of the involved parties to participate and contribute to the success of your engagement.

NONPROFIT SERVICES

- Financial Statement Audits
- Forms 990, 990-T and 990-PF and other tax forms
- Employee Benefit Plan Audits
- Outsourced Financial Services
- Single Audits under Uniform Grant Guidance
- Information Systems Assurance (SSAE 16)
- Merger and Acquisition Due Diligence
- Preparation of Exemption Applications
- Unrelated Business Income Tax (UBIT) analysis
- Strategic Planning and Organizational Development
- Consulting
- Financial Management
- Governance Issues

NONPROFIT PRACTICE LEAD



Jack Murray, CPA

Jack Murray has provided tax and assurance services since 1988 and serves as the leader for HoganTaylor's Nonprofit practice. The practice is substantial, with more than 100 clients that run the gamut from large public and private colleges and universities, associations and foundations to smaller service organizations such as voluntary health and welfare organizations and member service organizations.

Jack works regularly with his clients' management and board members to help them understand the unique governance, accounting, and financial and tax reporting requirements for entities in the nonprofit sector.

NONPROFIT PRACTICE LEADERSHIP TEAM

HoganTaylor's nonprofit audit and tax expertise is among the best in Oklahoma and Arkansas. We currently serve a broad range of more than 100 nonprofit clients from small to those with assets of more than \$4 billion.



Lyndel Lackey, CPA



Richard Wright, CPA



Calvin Rowland, CPA



Kim Fairchild, CPA

ABOUT HOGANTAYLOR

HoganTaylor is one of the largest business advisory and public accounting firms in Oklahoma and Arkansas. In addition to Nonprofit Assurance, Tax & Advisory services, HoganTaylor has many other practice groups made up of knowledge experts in important, highly specialized areas of accounting and business.

SERVICES

Accounting Solutions	Litigation Support
Advisory	Outsourced CFO Services
Assurance	Risk Assurance
Business Valuation	Tax
Employee Benefit Plans	Technology
Human Capital	Wealth Management

INDUSTRIES

Collective Investment Funds	Nonprofit
Construction	Real Estate
Energy	Retail
Financial Institutions	Transportation
Insurance	
Manufacturing & Distribution	

PRIMEGLOBAL

HoganTaylor is an independent member firm of PrimeGlobal, one of the five largest associations of independent accounting firms in the world. As an independent member, HoganTaylor has access to a wide range of PrimeGlobal tools and resources around the globe.



CONTACT INFORMATION

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