

## Consulting Services

Value-Added Services for  
Tax Exempt Entities:

Audit  
Outsourced Accounting  
Tax Planning & Preparation  
Sarbanes-Oxley Consulting  
Management Consulting

### Who is Calibre CPA Group?

Founded on a mission to **provide services of a superior calibre**, Calibre CPA Group was established by several CPAs whose careers have focused on providing a comprehensive array of audit, accounting, tax, and consulting services to tax exempt entities, labor organizations, employee benefit funds, and small business enterprises throughout the country.

### How Can Calibre CPA Group Help Me?

In today's economy, it's typical for many exempt organizations' financial health and operating procedures to be subject to scrutiny. In light of the Sarbanes-Oxley Act of 2002, which is designed to protect the financial interests of investors in publicly traded companies, many tax exempt organizations are also seeking assistance that can provide assurances similar to those of the Act. For example, quite a few prominent charitable organizations have voluntarily adopted some of the major principles of the Act to reassure members, contributors or others who may have a financial, philanthropic, or emotional stake in the organization.

### SARBANES-OXLEY CONSULTING

Because of this interest in fiduciary responsibility and our firm's extensive involvement with the exempt community, Calibre CPA Group has closely monitored developments of the Act and developed procedures and methods designed to help our clients in this regard. Having worked with a multitude of associations and not-for-profits with a variety of operational and organizational structures, we have developed a phased approach that:

- Plans our client's initial steps for conducting an internal review.
- Assesses their current state of operations.
- Documents their critical processes.
- Identifies and designs solutions for control gaps.
- Develops and implements whistleblower programs.
- Implements improvements and reports on change.

If legislation is passed to expand the Act's principles to the exempt arena, it's most likely that annual assessments will be necessary. Our professionals can also assist with continuing testwork that will provide an ongoing assessment of controls.

### OUTSOURCED ACCOUNTING SERVICES

For non-audit clients, and in limited other situations which would not impair our independence, Calibre CPA Group can provide a wide range of hands-on accounting services for associations, not-for-profits, and other entities such as:

- Assistance with financial statement preparation
- Budgeting
- Cash flow management
- Payroll management

We provide cost-effective bookkeeping services that can include recording daily financial activities, reconciling accounts, and assisting with accounts payable and accounts receivable.

Also, we have found our Outsourced Accounting Services to be an excellent solution for many organizations that require a seasoned Controller or Chief Financial Officer, but do not have the

funds to retain one on a full-time basis. In fact, our clients have found great value in our innovative solutions and some have employed our outsourcing services for many years.

### How Can Calibre CPA Group Help with Technology Issues?

Today, more than ever, many organizations have a hard time keeping up with the latest technological innovations. “What software would work for us?” “Do we really need to upgrade?” “Is there an answer to my problem that technology can affordably solve?” We frequently hear these questions when talking to our clients – problems that can require our skilled professionals to solve.

### MANAGEMENT CONSULTING SERVICES

Our professionals specialize in strategic planning, organizational development, project planning, RFP generation, management of third-party contractors, and assistance with the design and implementation of technology strategies. We can provide valuable assistance by helping you to isolate roadblocks to success, develop strategies for change, and aid with implementation of successful solutions.

### Why Should I Use Calibre CPA Group?

Because of our commitment to help select sectors of the US economy, our firm’s professionals have specialized their education and skills for associations and not-for-profits, labor organizations, employee benefit funds, and

small business enterprises. We can offer your organization more in-depth and focused services that result in real solutions to real problems.

### Want to Know More?

Contact us toll-free at 866.464.2839, drop a line to our company email ([info@calibrecpa.com](mailto:info@calibrecpa.com)), or visit our website at [www.calibrecpa.com](http://www.calibrecpa.com).



**CALIBRE**  
CPA GROUP  
PLLC  
A Member of KS International

**Washington, DC**  
**202.331.9880**

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**Chicago, IL**  
**312.920.9400**

[www.calibrecpa.com](http://www.calibrecpa.com)