



Malin, Bergquist & Company, LLP

CERTIFIED PUBLIC ACCOUNTANTS & BUSINESS ADVISORS

NOT-FOR-PROFIT CONSULTING

Malin, Bergquist & Co. – one of Western Pennsylvania’s largest and fastest-growing certified public accounting firms – serves more than 150 not-for-profit clients as a consultant, tax advisor and auditor. Our team provides clients with insights and solutions in the dynamics of governance, finance policies and accounting.

Malin Bergquist is a thought leader in the not-for profit industry, and sponsors the Non-Profit Leadership Institute of Duquesne University, regularly publishing articles on new policy and procedure updates in this niche field. We also regularly make public presentations at such events as Nonprofit Day in Erie, and give private briefings for many clients.

Our team places extraordinary value on its relationships with clients and in the quality of expertise we provide. Our team regularly obtains more than 1,200 hours per year in continuing professional education and training.

Not-for-Profit Client Highlights:

✓ Conducted workshops for boards of directors and management on effective governance and ethical practices.	✓ Gave presentations on proper accounting and IRS regulations impacting charitable contributions; demystifying cost allocations; and how to conduct effective financial oversight.
✓ Provided training for finance professionals. In one example, we held training sessions for 10 consecutive weeks for client personnel.	✓ Helped develop client policies governing donor privacy, gift acceptance, document retention, whistleblower protection, and effective cost allocation.
✓ Studied and analyzed clients’ executive compensation levels to determine whether they were reasonable.	✓ Created and implemented information technology consulting measures such as IT controls, application controls, and disaster recovery plans.
✓ Assisted with intermediate sanction matters, including helping a client overcome a potential intermediate sanction issue due to possibly excessive executive compensation.	✓ Provided Education Incentive Tax Credit advice both from a donor and organization standpoint, and have assisted in obtaining qualifications to accept donations that qualify for the EITC credit.
✓ Led executive recruiting, such as finding two CFOs and an assistant controller for clients in a very compressed timeframe.	✓ Assisted in matching prospective real estate donors with qualified client organizations.
✓ Assisted in developing business continuity plans.	

For more information, contact Vincent Halupczynski, head of Malin Bergquist’s Not-for-Profit Organizations Group, toll-free at 866.739.1561 or at vhalupczynski@malinbergquist.com.