

At a glance

This non-profit organization needed a financial presence on their board that could present financial reports on a monthly basis and develop a plan for growth.

Key metrics



100%
Increase in cash reserves



\$110K
Raised for capital campaigns



1
Investment portfolio and development plan created



Outsourced CFO



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CHALLENGES



This client needed a financial position on their board filled. They were using an outdated bookkeeping software, had few investments, scattered bank accounts, and no goal structure. They also needed assistance creating a vision, fundraising, and understanding their financial position.

SOLUTIONS



We put all their funds into one bank and updated their bookkeeping software. After creating reports that provided the board with a clear understanding of their financial situations we created a goal structure. We then enabled online donations, created an investment fund, and began planning for future capital campaigns.



Annual Reports



Fundraising



Financial Systems

RESULTS



1

Clean and Updated Accounting

We moved this client to a cloud-based accounting software, cleaned up their books, and installed better monthly and annual processes

2

Data Visualizations

Generated reports to provide the board with a clear understanding of their micro & macro financial situations

3

Cash Increase

Doubled their cash reserves, increased fundraising, and established an investment portfolio