

## PROVIDING SOLID FINANCIAL TOOLS FOR EDUCATIONAL INSTITUTIONS

**Educational institutions are facing more and more complex financial and accounting issues. They need an accounting and advisory firm that understands those issues. Warren Averett is the answer.**

Our professionals, whether experienced in tax, audit, advisory or varied consulting services, are committed to meeting the needs of colleges and universities, both public and private. Whether working with management or board members, our education team of dedicated accounting professionals will assist you in navigating issues related to financial reporting, tax-exempt status and grant compliance.

### OUR SERVICES

- Attest engagements, such as NCAA agreed-upon procedures
- Audits of employee benefit plans
- Benefit plan design and administration
- Compensation reviews
- Data analytics and modeling
- Development of accounting policies and procedures
- Executive placement and staffing and recruiting
- Financial statement audits of educational institutions and related foundations
- Grant compliance assistance
- Internal control and process evaluation
- Outsourced CFO services
- Policy development
- Program and project management support
- Single Audits

- Software system assessments and implementation
- Strategic planning, budgeting and forecasting models
- Tax (990) review or preparation
- Tax planning and compliance
- Technology consulting and outsourcing

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Our education professionals bring  
**A DEEPER, TAILORED  
LEVEL OF EXPERTISE**  
to schools, colleges and universities,  
both public and private.

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### RELATIONSHIPS DESIGNED TO HELP YOU SUCCEED

We are proud to maintain an active role in the higher education industry by participating in a number of associations, including:

- National Association of College and University Business Officers
- Southern Association of College and University Business Officers

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To enhance the services our experienced professionals offer, we are an independent member of the BDO Alliance USA, a nationwide association of independently owned local and regional accounting, consulting and service firms with similar client service goals. Our membership gives us access to additional specialty services, niche capabilities, personnel resources and the opportunity to work jointly on engagements.

In our ongoing relationship and work with your institution, Warren Averett will always seek to find ways to help save you money, stay in compliance and plan with your goals and vision in scope.



### FRESH, DATA-DRIVEN IDEAS

Long-term success depends on understanding and applying your financial data correctly right now. Get stronger insights from your advisors that lead to greater success for your institution's next big plan.



### SIMPLIFIED COMPLIANCE

Access advice for potential financial and operational improvements while avoiding the issues that could lead to loss of funding, reputational damage, financial penalties or legal action.



### DEEP EXPERTISE AND INTEGRITY

Make better-informed financial decisions for your higher education institution based on insight from our advisors that you'll know is both technically accurate and formulated in your best interest.



"We receive open communications and assistance for our annual financial audit, Uniform Guidance and throughout the year with questions regarding new GASB requirements, etc."

— Susan Hayes  
University of Montevallo

