

EDUCATIONAL INSTITUTIONS



Higher education and private schools face many of the same challenges as other businesses and financial management is often times more diverse and complex. A large pool of revenue sources such as endowments, restricted contributions, alternative investments, grants, student financial aid, and so on, means there are complicated regulatory and compliance considerations. In addition, there are capital improvements, property, and facilities to manage.

Dalby Wendland works with numerous colleges, universities, and private schools across Colorado and the U.S. Services our education professionals provide include:

Tax Services

- Consultation, preparation, and filings of Form 990 Series
- Securing and maintaining tax exempt status
- IRS audit support
- Unrelated trade or business income consultation, preparation, and filings

Consulting Services

- Financial policies and procedures review/documentation
- Organization planning, financial projections, and budgets
- Entity set-up and organizational structure

Accounting Services

- Bookkeeping services and consulting
- Payroll processing and filings
- Financial statements, reporting, and management reports
- QuickBooks set-up, training, and consulting

Audit & Assurance

- Financial statement audits, reviews, and compilations
- Internal control reviews
- Operational audits
- Fraud investigations
- Agreed-upon procedures

Regulatory Services

- Directors' examinations
- Risk management



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