



*YOUR GUIDE TO OUR
Nonprofit Accounting
Support Services*



SYNERGY PATHFINDERS, LLC®



Empowering your mission with financial clarity

Welcome to a guide designed to support your nonprofit organization's financial health, compliance, and long-term sustainability.

Leading a nonprofit means navigating complex funding streams, meeting diverse stakeholder expectations, and ensuring your programs are supported by strong financial foundations. Whether you're experiencing growth, preparing for an audit, or simply need to refine your financial processes, we're here to help.

Our specialized accounting services give you the clarity and confidence to make strategic decisions, maintain donor and grantor trust, and remain focused on your mission.

Flexible, expert support for nonprofits

Make every move count. With trusted financial support, gain the clarity and confidence to advance your mission—without losing momentum.

Hiring and retaining skilled accounting professionals is increasingly difficult for nonprofits. And during peak periods such as audit season or year-end reporting, even a strong internal team can be stretched thin.

Instead of hiring additional staff, our flexible services allow you to scale up support as needed. Whether it's preparing for a grant report, budgeting for a new program, or meeting an urgent compliance deadline, our experienced team is ready to step in.



Cash Flow Forecasting for Nonprofits

Cash flow for nonprofit organizations isn't just about having funds today - it's about planning for the sustainability of your mission. We provide proactive insights into how restricted and unrestricted funds move in and out of your organization. Our analysis helps you anticipate cash shortfalls before they happen and identify opportunities to strengthen your financial position. With clear forecasting and scenario planning, we support decision-making that keeps your mission on track. We translate complex financial data into actionable strategies, so your leadership team can focus on impact, not just dollars.

Services include:

- Review of historical trends to inform future planning
- Forecast vs. actual cash flow tracking
- Receivables, payables, and funding cycle analysis
- Ongoing cash management support

Deliverables can include:

- Initial assessment of your cash position
- Custom cash flow forecast
- Regular updates (monthly or quarterly)
- Visual dashboards and actionable recommendations



“Success has nothing to do with what you gain in life or accomplish for yourself. It’s what you do for others.”
– Danny Thomas

Tax Compliance Support Services

Filing the Form 990, and other related information returns, is not just a compliance task – it’s a public-facing document that reflects your organization’s impact and stewardship. We help ensure accuracy, completeness, and alignment with your organization’s mission. Our team highlights key narrative and financial elements to present a clear, compelling story to donors, regulators, and the public.

Services include:

- Initial consultation
- Document collection & organization support
- Functional expense allocation
- Form 1099 review

Deliverables can include:

- Organized financial documentation
- Year-end financial statements
- Post-filing review and summary



*“Taxation is the price
we pay for
civilization.”
– Oliver Wendell
Holmes Jr.*

Budgeting Assistance & Program Planning

A strategic budget is key to delivering on your mission and making informed decisions. We help you build realistic, program-specific budgets that support grant proposals and board oversight. Our process aligns financial planning with organizational goals, ensuring every dollar has a purpose. With the right tools and structure, your team can manage resources proactively and adapt with confidence. Clear, well-communicated budgets also strengthen internal accountability and trust.

Services include:

- Collaborative planning sessions
- Budget-to actual tracking setup
- Support with grant and program budgets
- Participation in planning meetings

Deliverables can include:

- Custom organization-wide and program budgets
- Break-even and funding gap analysis
- Templates for ongoing tracking and review



“Beware of little expenses. A small leak will sink a great ship.”
– Benjamin Franklin

Financial Reviews and Board Reporting

Your financial statements tell your nonprofit's story. We help you ensure that the financial statements are accurate, transparent, and compliant with accounting standards. Clear financials build trust with funders, boards, and other stakeholders. We also help interpret the numbers, so your team can make informed, mission-driven decisions. Whether preparing for an audit or presenting to your board, we make sure your financials are ready. With our support, you gain confidence in both the numbers and the narrative behind them.

Services include:

- Staff interviews to understand financial processes
- Review of financial data and journal entries
- Consultation with leadership and board, if desired
- Ongoing advisory support

Deliverables can include:

- Reviewed financial statements
- Key performance indicators and ratio analysis
- Recommendations for improvements
- Executive summary for board use



“The smallest act of kindness is worth more than the grandest intention.”

– Oscar Wilde

Policies and Procedures Development

Strong financial management begins with clear policies. We help you establish and document internal controls, and best practices for your team. These foundational elements not only promote accuracy and transparency but also reduce risk and support long-term sustainability. With the right structure in place, your organization is better positioned to make decisions and demonstrate accountability to stakeholders.

Services include:

- Review and update of existing policies
- Development of new documentation

Deliverables can include:

- Accounting policies manual
- Key procedure documentation
- Segregation of duties matrix
- Workflow diagrams and editable checklists



*“Helping one person
might not change the
whole world, but it
could change the
world for one person.”*
– Unknown

Audit Preparation Support

Facing an audit doesn't need to disrupt your mission. We provide support to help you prepare, stay organized, and minimize audit findings. From gathering documentation and reconciling accounts to answering auditor questions, we guide you through the entire process. Our goal is to reduce stress, ensure accuracy, and help your team demonstrate strong financial stewardship. With our support, you can approach audits as an opportunity to build trust and improve internal practices.

Services include:

- Pre-audit readiness assessment
- Internal control and compliance review
- Financial and grant documentation review
- Staff training and support
- Liaison services with your auditors

Deliverables can include:

- Audit PBC (Prepared by Client) checklist management
- Reconciliations and supporting schedules
- Internal controls documentation



“There’s nothing like an audit to make a company appreciate its accounting team.”

– Anonymous



Tailored solutions

How We Work With You.

Our process is collaborative and tailored to your needs:

- Initial consultation
- Define objectives
- Scope and agreement
- Onboarding and information gathering
- Action plan development
- Implementation and ongoing support
- Feedback and adjustments

Why partner with us?

- Expertise in nonprofit accounting and compliance
- Scalable support when you need it
- Enhanced financial accuracy and transparency
- Improved cash flow management
- Stronger donor and board confidence
- Faster grant and audit readiness
- Objective, strategic insights

About Us

Synergy Pathfinders, LLC (SP) was founded to help organizations overcome operational challenges and implement best practices that enable mission success.

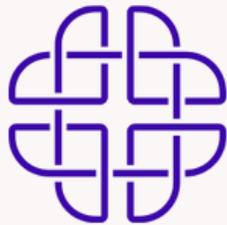
Our founder, Heather Garland, brings over 25 years of accounting and operational experience, including more than a decade in public accounting. Volunteerism and working with nonprofits has been a long-time passion of hers. She has successfully guided organizations through strategic improvements in financial management and operational efficiency. Heather's passion lies in helping purpose-driven organizations uncover unseen obstacles and design effective, mission-centered solutions. "My passion is working with companies to find solutions for their obstacles - including the ones they don't know they have," says Heather.



Heather



Ready for a free consultation?
Scan the QR Code!



SYNERGY PATHFINDERS, LLC ®

www.synergypathfinders.com | (703) 965-1355

heather@synergypathfinders.com

Follow Us on [LinkedIn](#) and [Facebook](#)!