Green Hasson Janks & 2016 Nonprofit Workshop

Six decades, one overriding focus: *our clients*

Founded in 1953, Green Hasson Janks is an independent accounting and business advisory firm located on the west side of Los Angeles. Collaboration and maintaining strong relationships are the cornerstones of success.

- Named "Best Places to Work" by the *Los Angeles Business Journal* in 2008, 2009, 2011, 2012, 2013, 2014 and 2015
- Named "Beyond the Top 100: Firms to Watch" and "Top Firms: West" in the 2014, 2015 and 2016 *Accounting Today* Top 100 Firms
- Named a "Best of the Best" firm and "Beyond the IPA 100 Firm" by *Inside Public Accounting*
- Named a "Fastest-Growing" firm twice in *Beyond the IPA* 100 rankings
- Ranked 18th largest CPA firm in Los Angeles County

Mission

We build relationships with our clients to achieve financial and business success; being our clients' trusted advisor is the ultimate measure of our performance.

Our firm has collaborated with forward-thinking, entrepreneurial businesses and nonprofit organizations — working as their business advocate, providing personalized services and building long-term relationships to help position them for long-term success.

We are deeply committed to our core values and incorporate them into every aspect of our business to ultimately provide unparalleled client service.

Vista

Core Values

- Act as one firm
- Keep our commitments
- Grow great people
- Encourage new ideas

Global in Reach, Local in Touch

Along with expertise in nonprofits, we assist clients by leveraging our world-wide network of independent accounting firms and business advisors located across the United States and in over 100 countries. As our clients become more aggressive players in the global economy, we are able to respond quickly through our HLB International network to help with the success of their ventures.

#GHJNonprofit

Continue the conversation on social media!

- Connect with other attendees
- Share with your industry connections

@GHJ_Updates @greenhassonjanks

@company/green-hasson-janks

Contact Us

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Accounting and Tax Update
June 8, 2016

Speaking Today

Leon Janks, Managing Partner

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ljanks@greenhassonjanks.com

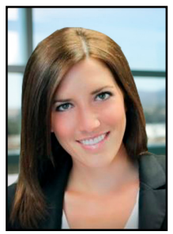
Leon has over 30 years of experience in the areas of audit and accounting, tax planning and general business consulting. He advises his clients on matters related to strategic planning, profitability, mergers and acquisitions, and buying and selling businesses. Leon is on the Board of Directors of the Jewish Federation and is the chairman of the Audit Committee.

Donella Wilson, Partner
Panelist
310.873.1649
dwilson@greenhassonjanks.com

Donella has over 18 years of public accounting experience providing audit, accounting and special project services. She is a frequent guest lecturer and conference speaker on nonprofit financial management and governance issues and has taught Nonprofit Financial Management at USC's School of Public Policy, Planning and Development as an Adjunct Professor.

Margaret Karren, Partner
Moderator
310.873.1617
mkarren@greenhassonjanks.com

Margaret has over 25 years of experience at the firm and more than 10 years in private industry as a controller. She works exclusively on nonprofit clients and provides them audit, accounting and consulting services. Margaret also sits on the board of several nonprofit organizations and is a frequent speaker and guest lecturer on nonprofit issues.



Lauren Haverlock, Principal
Panelist
310.873.1675
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Lauren has over 11 years of experience in public accounting with a focus on tax-exempt organizations. Lauren's experience includes preparing, reviewing and consulting on federal and state returns for public charities, private foundation and other nonprofit organizations. She is passionate about her clients' missions and helping new organizations implement strong infrastructures.

Akash Sehgal, Director
Panelist
310.873.1622
asehgal@greenhassonjanks.com

Akash has over 18 years of state and local tax experience with two Big Four firms in Los Angeles and Seattle. He leads the firm's state and local tax practice with a focus on multistate income and franchise tax, sales and use tax and credits and incentives. Akash assists his clients on complex state and local tax issues related to transactional planning, mergers and acquisitions, general day-to-day consulting and compliance.

Stephanie Yan, Senior Manager
Panelist
310.873.1667
syan@greenhassonjanks.com

Stephanie has over 12 years of public accounting experience providing audit, accounting and general business consulting services. Her industry expertise includes deep experience in private foundations and nonprofits, and she leads the Firm's Private Foundation Team. She also has three years of corporate accounting experience in both privately held and public companies.

Green Hasson Janks Nonprofit Practice

For over 30 years, we have worked with both private foundations and public charities and currently have the privilege of providing audit, accounting, tax and consulting services to more than 100 nonprofit clients. We in fact provide services to 10 of the top 25 private foundations in Southern California.

Our staff is well versed on current nonprofit benchmarking and governance issues, and a number of our employees also serve on boards of nonprofit organizations, which gives them insight to the operational and financial challenges unique to nonprofits.

OUR SERVICES INCLUDE:

Accounting and Auditing Services
- Financial statement audits
- Yellow Book audits
- Single Audits
- Reviews and compilations
- Special projects
- Employee benefit plan and pension audits

Management Consulting Services
- Benchmarking and best practice models
- Training and education for Uniform Grant Guidance, Yellow Book and GAAP
- Cost allocation plans to maximize grant funding
- Board Governance assessment
- Internal control strengthening and assessment
- Enterprise Risk Management
- Merger and acquisition consulting
- Budgets and cash-flow projections

Tax Services
- Year-round planning and review for tax-exempt organizations, including:
  - IRS Forms 990, 990-T and 900-PF
  - State of California Forms 199 and 109
  - State of California Attorney General Form RRF-1
  - Various other returns
- Proactive tax research
- Corporate, pass-through and individual state and local tax planning and compliance

2016 Nonprofit Workshop: *Accounting and Tax Update*

Agenda

Breakfast and Networking	Mix and mingle with other Nonprofit Leaders
Welcome and Introduction	Leon Janks, Managing Partner Donella Wilson, Partner
Panel	**Moderator:** Margaret Karren, Partner **Panelists:** Donella Wilson, Partner Lauren Haverlock, Principal Akash Sehgal, Director Stephanie Yan, Senior Manager
Table Discussions	Facilitated by Green Hasson Janks Experts
Closing Remarks	Donella Wilson, Partner