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edelsteincpa.com



Private Foundations

YOUR MISSION IS OUR MISSION

Edelstein & Company can help you balance your foundation's financial and operational requirements with the needs of the communities you serve. We work with you to:

- Implement best practices with respect to your administrative and financial operations
- Fulfill the state and federal regulatory requirements unique to private foundations
 - Prepare estimated taxes
 - Plan for making your minimum distribution requirements
 - Prepare filings for foreign transactions
- Advise on grant-making compliance
- Conduct financial analysis of grantees to assist with grant application evaluation
- Assess the impact of changing laws, regulations, and the business climate, and recommend a practical approach to manage these issues
- Provide strategic long-term planning guidance to ensure your organization's success over the long haul

Our Nonprofit Team makes it easier to manage organizational finances, governance issues and regulatory compliance, so you can focus on what really matters – making a difference.

To learn more about how we can help, contact **David McKay** at 617-227-6161.