



*CPAs / ADVISORS*

 **blue**

**We are responsive.**

**We are caring.**

**We are advocates.**

**blueandco.com**

## OUR MISSION IS TO SUPPORT YOUR MISSION.

We want to stand with you, not only as your business partner, but as an invaluable resource to promote your services in the community. We believe in our not-for-profit clients and are dedicated to helping you carry out your vision. Let us be a partner to you as you drive your organization to succeed. [Click here for a short message from our team.](#)

## ABOUT THE FIRM

At Blue & Co., we have significant non-profit experience across our audit and tax practices, which includes serving 27 community foundations and many other public and private foundations. The history that our firm has with community foundations paired with our intricate understanding of the inner workings of these organizations and the professional relationships that have developed as a result, allows our team to provide full-service solutions to meet your needs.

Blue & Co. is a top-60 CPA firm in the U.S., with offices throughout Ohio, Kentucky, and Indiana. Since 1970, Blue & Co. has been focused on providing individualized service to clients to help them achieve their goals. We understand that each organization has unique challenges, and we believe in developing lasting relationships to be able to help solve our clients' problems. We demonstrate our commitment to our clients by living by three simple core values:

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## KEY SERVICE OFFERINGS FOR FOUNDATIONS

Your organization is here for a reason. You have a mission to accomplish and you're going to drive hard every day to meet that challenge. Blue & Co. understands the day-to-day management issues and ever-present operational concerns — such as internal controls, segregation of duties, management effectiveness, and board development — and we offer practical solutions that add value.

### Key Service Offerings for Foundations

- Audits and reviews of financial statements
- Monthly, quarterly, or annual compilations of financial statements
- Agreed-upon procedures to address specific financial objectives
- Form 990 and related state informational returns
- State property tax exemptions and minimization
- Public support projections and forecasts
- Unrelated business income tax strategies
- Graphical trend analysis and peer comparisons
- Recommendations on internal controls and suggestions for improvements
- Information concerning best practices in our client base

### Additional Benefits and Offerings

- Email newsletter for timely and relevant updates about emerging issues in your industry  
[Click here to view some of our recent NFP articles.](#)  
[Click here to visit our COVID-19 Resources Center.](#)  
[Click here to subscribe to our newsletter.](#)
- Bookkeeping and reconciliation services
- Development of profit plans and budgets to address sustainability issues
- Consulting on new accounting standards and their impact on your organization
- Employee benefit plan development and administration
- Cyber risk assessments and internal control consulting

## CONNECT WITH OUR TEAM

[Click here for a short message from our team.](#)



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