

Session One

Speed Reading Financial Statements: Effective Review Practices for Non-Financial Executives

Law & Finance

Financial statements can be intimidating, yet they contain enormously valuable information. More importantly, they are used by external decision-makers who hold your financial well-being in their hands. This workshop teaches financial statement speed-reading tricks that will help participants spot the issues that catch the attention of external financial statement users. More importantly, we'll talk about what those numbers mean, and how they can be improved by the organization.

Howard Donkin, CPA and Partner at Jacobson Jarvis, specializes in serving not-for-profit organizations' tax-related needs. Howard has served on a number of federal and state advisory panels contributing to the development and interpretation of tax laws impacting not-for-profits, including the Redesigned Form 990. He is also a frequent speaker on federal, state and local tax issues. In addition to his professional service, Howard has served on several not-for-profit boards.

Erin Welch, CPA and Partner at Jacobson Jarvis, is a financial statement auditor and consultant, working with not-for-profits to prepare financial statements that accurately and effectively communicate to external audiences. She also helps clients implement internal controls and other processes, facilitates board financial training and communications, and conducts financial health assessments for not-for-profits. In addition to her professional service, Erin is a member of the Mockingbird Society board and the United Way Audit Review Committee.