



# DONATIONS

## Services to Not-for-Profit and Charitable Organizations

Pride. Passion. Professionalism.

### NFP Specialists

Collins Barrow Ottawa LLP has assembled a strong team of NFP specialists with many years of collective experience in providing audit and accounting advice and compliance. Our professionals bring the credentials and experience you need to play an integral role in your organization's success.

### Experience is the Key

Collins Barrow Ottawa LLP has the required resources, experience and skills to provide the services and advice that you require.

- We invest significant time and resources in the NFP and charitable organization sector and we feel that we are experts in the field.
- We have the appropriate knowledge and are familiar with the issues facing the NFP and charitable community.
- We provide services to a very large number of both large and small NFP and charitable organizations, mostly as audit engagements including preparing and/or advising on their tax filing requirements and other tax issues.
- We provide a full range of tax services to our NFP and charitable organization clients such as:
  - ✓ Compliance with NFP and charitable organization tax filings;
  - ✓ Litigation support;
  - ✓ Assistance with tax appeals of reassessments;
  - ✓ EHT reviews; and
  - ✓ GST, HST and PST reviews.

### Profile and Firm Structure

- Collins Barrow Ottawa LLP is a limited liability partnership under the laws of Ontario growing from its inception in the late 1950s to the point where we now rank among the larger CA firms in the City of Ottawa.
- Not-for-profit (NFP) organizations including charities are a key component of our client base and we are proud to say that this sector is one of our specialties.
- Our NFP and charitable organization clients do not compete for our attention with large multi-national and national publicly listed companies.
- Our NFP and charitable organization clients are significant clients to us.
- We have an NFP and charitable organization industry group which focuses solely on NFP and charitable organizations as an area of practice, recognizing the needs and uniqueness of the sector and ensuring our human resources are specifically trained in this area of expertise.

### Client Service Team

- We have a large contingent of staff who spend a significant amount of time providing professional services to the NFP and charitable organization sector.
- Our partners and staff are involved in the sector and are kept abreast of sector developments through contact with our clients; relevant research and readings; as members of boards of directors and/or committees thereof of such organizations; and as members of NFP sector associations.

#### Ottawa Office

301 Moodie Drive, Suite 400  
Ottawa, Ontario K2H 9C4  
T (613) 820-8010 F (613) 820-0465  
[ottawa@collinsbarrow.com](mailto:ottawa@collinsbarrow.com)

#### Manotick Office

1136 Clapp Lane  
Manotick, Ontario K4M 1A3  
T (613) 692-2553 F (613) 692-2995  
[manotick@collinsbarrow.com](mailto:manotick@collinsbarrow.com)

#### Queensview Office

2725 Queensview Drive, Suite 500  
Ottawa, Ontario K2B 0A1  
T (613) 226-5661 F (613) 226-3141  
[queensview@collinsbarrow.com](mailto:queensview@collinsbarrow.com)

# Services to Not-for-Profit and Charitable Organizations

- The development of our staff is based on a program that includes:
  - ✓ Ongoing/continuous mentoring, monitoring and guidance by experienced professionals;
  - ✓ Training courses; and
  - ✓ Practical on-the-job experience.
- We view the management letter as an opportunity to provide a constructive value-added service. The management letter receives the same degree of care and attention as our auditors' report on the financial statements and it is issued on a timely basis.

## Our team leaders are:

**Dennis Medaglia, CA**, is a Partner of the firm and brings over 25 years of professional assurance expertise in various industry sectors but most specifically in not-for-profit organizations, charities, local government and school boards.

Contact Dennis at: [dmedaglia@collinsbarrow.com](mailto:dmedaglia@collinsbarrow.com)

**Rosa Maria Iuliano, CA** is a Partner of the firm specializing in providing income tax, commodity tax, and financial planning advice to proprietorships, partnerships and owner-managed corporations as well as not-for-profit organizations.

Contact Rosa at: [riuliano@collinsbarrow.com](mailto:riuliano@collinsbarrow.com)

## Audit Approach

- We are committed to a partner-driven, hands-on approach that ensures closer contact with our clients, results in a more efficient audit and addresses issues promptly.
- Our audit methodology is focused on our analysis of risks and complies with the audit risk standards issued by the Canadian Institute of Chartered Accountants. We also have comprehensive quality control processes.
- Our policy on the provision of management letters is that all significant weaknesses in controls, control activities, control procedures and other matters of material importance including governance or opportunities for financial improvements that come to our attention during an audit must be reported in writing to management, together with our recommendations for corrective action or improvement. We go beyond the financial statement commodity.

## Client Service Philosophy

- Our team's dedication to client communication and service as well as our extensive experience pays dividends for our NFP and charitable organization clients.
- We issue regular client newsletters which encompasses a broad range of topics.
- We share emerging information with our clients on a client specific basis.

## Fees, Hours and Timing

- Our fees are competitive.
- No additional administrative charges are added to our fees.
- Sufficient hours are applied to ensure effective and efficient audits.
- Our timing is flexible to meet client deadlines.
- We are committed to excellence in client service.

For more information on our approach, solutions for specific client groups, and the credentials of our experienced team, please visit:

[www.collinsbarrowottawa.com](http://www.collinsbarrowottawa.com)

*The information in this bulletin is current as of November 2009.*

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INTERNATIONAL

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