

Managing Your Public Charity

What Can Sterling Do For You?

We help you make an impact.

We bring value-added services.

We believe in relationships.

Our comprehensive charity management services let you focus on your charitable programs without having to worry about administrative and compliance burdens. Our nonprofit experts help you achieve your desired charitable impact.

Our team of specialists bring both not-for-profit and for-profit industry experience to offer you best practices in managing your charity for maximum efficiency and effectiveness.

We know that every charity is unique which is why we take the time to understand your charity's values, objectives and needs. We offer more than just a platform. Our approach is people-focused with an emphasis on high quality service.

We provide turn-key management services with access to our advisors for charitable planning and consultation.

Management

- Transition Assessment
- Governance Structure & Policies
- Records Management
- Tax Return Preparation & Filing
- Compliance & Risk Management
- Public Support Test
- Grant Management
- Financial and Management Reporting
- State Charitable Solicitation Registration

Hiring & Staff

- Compensation Benchmark Analysis
- Employee Agreements
- Payroll & Benefits
- Year-end 1099 Forms

Financial

- Audit Support
- Asset Donation Analysis

Advanced Governance

- Strategic Planning & Offsites
- Board Development & Facilitation
- Succession Planning

Advanced Grants

- Complex or Multi-Year Agreements
- International Grants
- Disaster Relief

Programming

- Original Programming Design
- Scholarship Program Design
- Impact Evaluation

Other Advisory

- Donor Management
- Fundraising and Event Planning

Visit us at
www.sterlingfoundations.com
for more information.

Please see other side for more details on our management services.

Managing Your Public Charity

The details here are for our Management Services. Please contact us for more information on our other services.

New Charity Creation

We can file for the creation of your public charity in as little as 24 hours. We handle all aspects including the federal tax identification number, bylaws, articles of incorporation, conflicts of interest policy, and tax exemption application to the IRS.

Governance

We work with the board to help structure the charity's governance in a manner most consistent with your values, goals, and mission. This can include developing roles and responsibilities, and establishing guiding policies and procedures.

Records Management

We will maintain records related to transactions such as contributions, donations, expenses, fees, and grants. All documentation related to the charity establishment, governance, and tax filings will be archived for easy retrieval and reference.

Tax Return Preparation and Filing

We will work on your preferred fiscal year and prepare the charity's federal and state tax returns. We will advise you on best ways to minimize excise taxes and will review all information with you before filing in a timely manner.

Financial and Management Reporting

We will provide regular financial and management reports that will include the status of meeting the public support test. We also monitor any changes to tax laws and notify you of any impacts.

Compliance Management

We will manage compliance requirements and provide guidance to avoid common activities that jeopardize tax exempt status such as:

- Private benefit and inurement
- Lobbying and campaign activity
- Federal and state filing requirements
- Employment status
- Public support test
- State charitable solicitation registration

Public Support Test

We will monitor the charity's compliance to the public support test which demonstrates broad funding support. We will provide early indicators of any risk of losing public charity status.

Grant Due Diligence and Management

Depending on your preference, we can handle the entire grant process for you. We will work with you to make the grant process efficient and effective which can include:

- Grant selection criteria
- Recipient due diligence
- Negotiations and grant agreements
- Monitoring and measurement
- Grant processing

State Charitable Solicitation Registration

If applicable, we will register and manage renewals for donation solicitation as required in 40 states and the District of Columbia (if applicable).

Sterling does not manage investments or custody assets. We work collaboratively with your advisors to provide seamless and integrated services.

Making Your Philanthropy Make a Difference.™



For more information, visit us at www.sterlingfoundations.com.
Contact us at foundations@sterlingfoundations.com or (703) 437-9720.