

REQUEST FOR PROPOSAL (RFP)

DATE

PERSON

COMPANY

ADDRESS

Subject: Request for Proposal (RFP)

Dear **NAME**,

Our not-for-profit social service organization, **ORGANIZATION**, is seeking proposals for nonprofit audit and tax services from several CPA firms with extensive experience in serving not-for-profit associations. If your firm meets these criteria, we invite you to submit a proposal.

To assist you in preparing your proposal, we have provided the following information about our organization and its financial status.

1. About Our Organization

1.1 Background and History:

ADD INFO

1.2 Current Financial Information:

ADD INFO

2. Audit Schedule

ORGANIZATION operates on a fiscal year ending **YEAR END**. We anticipate being ready for the audit to commence by **DATE** and expect the delivery of financial statements and a management letter by **DATE**. Timely filing of all tax returns is also expected.

3. Requested Services

We request your firm to provide the following services:

1. Audit the financial statements for the years ending **YEAR END**.
2. Prepare a management letter.
3. Prepare and review our tax returns (990).
4. Be available to answer questions throughout the year.

If you choose to submit a proposal, we will provide you with:

- Current financial statements

- Current trial balance
- Latest tax return
- Chart of accounts
- Organization chart

4. Proposal Requirements

Please include the following information in your proposal. To facilitate comparison, provide the information in the order requested.

4.1 Firm Philosophy and Services

- Brief description of your firm.
- Current engagements in our industry, including advisory roles held by partners or employees.
- Your firm's approach to performing a nonprofit audit, including planning, scheduling, partner and manager commitment, quality control, and unique advantages.

4.2 Additional Services

- Other services available through your firm.

4.3 Engagement Scheduling and Staffing

- Engagement team members, including resumes of partners, managers, and senior staff.
- Expected timing and completion of the audit, and delivery of financial statements and management letter.
- Assistance required from our accounting staff.

4.4 Fees

- Audit fee structure, including whether expenses are included.
- Billing for overruns and how to avoid "surprise" billings.
- Availability and billing for advice and counsel during the year.

4.5 Additional Proposal Information

5. Proposal Submission Deadline

Proposals must be submitted by **DATE**. Late submissions will not be considered. All submissions will receive a response once a decision has been made. For questions regarding the RFP, please contact **CONTACT**. We appreciate your consideration of our request.

Please address your proposal to:

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Sincerely,