

PROPOSAL

Botanical Society of America



ANDERS
CPAs + ADVISORS

www.anderscpa.com | (314) 665-5500



INDEX

OVERVIEW	2
PROPOSAL SPECIFICATIONS	4
RELATED EXPERIENCE	4
INDEPENDENCE	6
ENGAGEMENT TEAM	6
AUDIT AND APPROACH	8
SCHEDULE	12
ENGAGEMENT FEES	13
BILLING OUTSIDE FEE SCOPE	14
REFERENCES	15
WHY ANDERS	16

EXHIBITS

Team Biographies
About Anders
Client Testimonials
Peer Review



OVERVIEW

For over a hundred years, Botanical Society of America (BSA) has played an essential role in educating and providing resources for students and teachers in the botanical sciences. Your goal for inclusivity demonstrates the crucial need for everyone to contribute to preserve and positively impact our environment. The better equipped individuals are, the more profound their work and influence will be.

Anders CPAs + Advisors (Anders) partners and staff are inspired by the clients we serve, clients like BSA. We are committed to providing great service, technical expertise, and industry knowledge to our clients, while also making it easy to partner with us and work with us. We want you to receive the same high-quality service you provide every day and believe that same commitment will make us an ideal partner for BSA.

ALWAYS ... GET MORE VALUE

Our commitment goes beyond traditional accounting services

The true value of working with Anders is our promise to help strengthen your organization and help you stand out. BSA can be confident you will benefit from engaging Anders. We will be ideal partners.

- ◀ We have a specialty in and a dedication to serving not-for-profit organizations. From the top down, we value these relationships and foster them through seminars, symposiums, blogs, education and a love of working on these engagements.
- ◀ Working with Anders is easy. We offer a team deep in bench strength that will be available to you when you need questions answered or ideas vetted.
- ◀ Continuity is key and we strive to offer our clients the same key personnel year to year whenever possible.
- ◀ Being an advocate for management is something you can count on. We pledge to thoroughly discuss audit matters with management, the Audit Committee and the Board of Directors, ensuring BSA stakeholders and Anders are on the same page in order to achieve the most success.
- ◀ Timing can be everything and we commit to completing the engagement on your timeline. Know we are only a phone call or email away.
- ◀ BSA is set up for success with the latest standards and compliance; Anders will keep you ahead as new guidance is required.

- ◀ Anders ranks #77 among the thousands of accounting firms located in the U.S. We are headquartered in St. Louis, where decisions are made locally, so we can be nimble in our decision-making process.
- ◀ Our reach is global through our affiliation with the LEA Global (LEA), the fifth largest international accounting and advisory association.

The above are just the beginning of the benefits of our partnership. We will work together with management and governance throughout our engagement to further the BSA mission.



ALWAYS ... CHOOSE THE BEST

You will find that we are:

GREAT COMMUNICATORS

- ◀ Communication is key, and we strive to keep you informed about new developments in matters related to your organization
- ◀ You will receive great information from your team personally and from our blog, newsletters, events, and seminars

THE RIGHT SIZE

- ◀ BSA is our ideal client, and we are the right size for you
- ◀ Anders is locally committed with extensive global resources
- ◀ Our 58-year history, our people and our systems add value from day one

ALWAYS READY

- ◀ Your work is not 8-to-5, and you may need us outside of the traditional workday. While we do not expect our partners and staff to work 24-7, we are available when our clients need us to be through advanced technology

ETHICS, CONDUCT AND CONFIDENTIALITY

Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as scrupulous regard for the highest standards of conduct and personal integrity. You can be assured that your organization will not be discussed with other entities within your industry.

YOU ARE IMPORTANT TO ANDERS

BSA will be an important client to Anders. You will receive the priority attention you deserve on this engagement, and we will be available to offer timely advice and assistance on other matters.



PROPOSAL SPECIFICATIONS

RELATED EXPERIENCE

Serving not-for-profits is an important commitment to Anders. We recognize and applaud the important role these organizations play in our communities and understand the challenges you face in today's business and regulatory environment. Each organization is different, with its own culture, circumstances, mission, stewardship and reporting. Anders dedicates significant resources to ensure not-for-profit organizations receive value-added services when appropriate, including:

AUDIT	CONTROLS	FINANCIAL
<ul style="list-style-type: none"> ◀ Audit Committee Consulting ◀ Single Audits Under Uniform Guidance ◀ Audits, Reviews and Compilations 	<ul style="list-style-type: none"> ◀ IT Systems, Risk Management and IT Compliance ◀ Policy Development and General Business Consulting ◀ Operations Management ◀ Fraud Detection and Prevention 	<ul style="list-style-type: none"> ◀ Tax Preparation Forms 990, 990-PF, and 990-T, UBIT and Forms 1023/1024 ◀ Budget and Cash Flow Planning ◀ Board Fiduciary Responsibilities ◀ Financial Outsourcing

ALWAYS...WORK WITH EXPERTS

Our clients are engaged in community and social service, health and welfare, arts, cultural, civic service, trade association and religious endeavors. Below are the not-for-profits, associations, and foundations we work with:

WE SERVE: NOT-FOR-PROFITS

- | | | |
|---|--|--|
| <ul style="list-style-type: none"> ◀ ACCESS Family care ◀ American Civil Liberties Union of Missouri ◀ Area Resources for Community and Human Services ◀ Assistance League of St. Louis | <ul style="list-style-type: none"> ◀ Basket of Hope ◀ Boys Hope/Girls Hope of St. Louis ◀ Craft Alliance Center of Art + Design ◀ De Smet Jesuit High School ◀ DePaul USA | <ul style="list-style-type: none"> ◀ Disabled Citizen's Alliance for Independence ◀ Epworth Children and Family Service ◀ Gateway to Hope ◀ Gene Slay Boys & Girls Club of St. Louis |
|---|--|--|

- ◀ HavenHouse St. Louis
- ◀ Independent Schools of St. Louis
- ◀ Laumeier Sculpture Park
- ◀ Loyola Academy
- ◀ Lutheran Woman's Missionary League
- ◀ Missouri Baptist Children's Home
- ◀ Missouri Humanities Council
- ◀ National Blues Museum
- ◀ Opera Theatre of St. Louis
- ◀ Productive Living Board
- ◀ Shakespeare Festival of St. Louis
- ◀ St. Louis Crisis Nursery
- ◀ St. Louis Mental Health Board
- ◀ St. Louis Regional Health Commission
- ◀ St. Elizabeth Adult Day Care Center
- ◀ Violence Prevention Center

WE SERVE: FOUNDATIONS

- ◀ Casino Queen Development Foundation
- ◀ Disabled Citizens Alliance for Independence Foundation
- ◀ Foundation for Project-Based Learning
- ◀ Fox Performing Arts Charitable Foundation
- ◀ Friends Forever Foundation
- ◀ Home Health Care Foundation
- ◀ Hope for Animals, Inc.
- ◀ Interco Charitable Trust
- ◀ Jackie Joyner-Kersey Foundation
- ◀ Kurt Warner First Things First Foundation
- ◀ Lutheran Family and Children's Services Foundation
- ◀ Mangrove Foundation
- ◀ SSM St. Mary's Health Center Foundation
- ◀ Southern Illinois Healthcare Foundation
- ◀ St. Louis Public Schools Foundation
- ◀ The Marian Foundation

WE SERVE: ASSOCIATIONS

- ◀ American Association of Orthodontists
- ◀ Beta Theta Pi Association of Washington University
- ◀ Better Business Bureau of Greater
- ◀ Greater St. Louis Dental Society
- ◀ Intergovernmental Employees Association
- ◀ Missouri Association of Student Financial Aid Personnel
- ◀ Masonic Temple Association of St. Louis
- ◀ National CSFP Association
- ◀ National Wood Flooring Association



INDEPENDENCE

Anders is independent of BSA under the requirements of the AICPA and the Public Company Accounting Oversight Board (PCAOB), except with respect to financial statement preparation, as established in Title II of the Sarbanes-Oxley Act of 2002. In addition, neither Anders nor the team assigned to this engagement have any conflict of interest in performing this work on behalf of BSA.

ENGAGEMENT TEAM

When assembling teams for clients, we match the expertise and prior relevant experience of our individual team members to each organization's specific needs. Members of your team will be available to you during the engagement, and throughout the year. We are a national firm that is locally based and all decisions are made from our St. Louis offices, allowing rapid responses to questions and issues that may arise during the engagement.

Team biographies can be found in the Exhibit Section of the proposal.



**JEANNE M. DEE,
CPA/CGMA**

Partner, Audit and Assurance
(314) 655-0167
jdee@anderscpa.com



**RAVEN S. LAWHORN,
CPA**

Audit and Assurance Manager
(314) 474-0687
rlawhorn@anderscpa.com

CLIENT ENGAGEMENT SPECIALIST

As a firm that believes in the value of innovation, Anders continuously searching for new ways to enhance our client experiences. Starting this year, we've introduced Client Engagement Specialists. We know that clients like you value consistency and a go-to, easy-to-talk-to partner. Sue Yaekel is the Client Engagement Specialist for the audit team. She will work with you and your audit team members every step of the way. When you have questions or need updates, or help with the Anders client communication portal, Sue will facilitate timely communication, training, updates, and more.



SUE A. YAEKEL

Client Engagement Specialist
(314) 655-5557
syaekel@anderscpa.com

STAFF CONTINUITY

When assembling client teams and leaders, we match the expertise and prior relevant experience of our individual professionals to each organization's needs. Because we take so much care in this process, we work hard to maintain staff continuity. By utilizing our accumulated client knowledge, we can minimize disruption and achieve maximum efficiency. All decisions are made locally, allowing rapid responses to client questions and issues that arise.

KEEPING CLIENTS INFORMED

We strive to keep our clients informed about new developments in matters related to your engagement as well as in broader areas such as tax, accounting and compliance. You will benefit from our information on timely, critical issues; our blog; and our seminars on topics of current interest. Our goal is to keep our clients informed about pertinent new accounting standards and tax regulations, and we will share these updates with you. Through our involvement on boards and committees with regional and national organizations, as well as in-depth experience gained with clients in your industry, we can implement continuous improvement and keep you informed of new issues and compliance requirements.

RESPONSE TIME TO EMAILS/VOICEMAILS

To accommodate our clients, we work when you need us. We also commit to returning client emails and voicemails within 24 hours. Through technology we can maintain ongoing, timely communication beyond the close of traditional business hours. We strive to maintain similar availability on evenings and weekends, recognizing that response times may be slower due to personal and family commitments. Clients find our efforts to keep open and timely lines of communication one of the greatest strengths of Anders.

QUALITY RECORD

Anders has a record of high-quality audit work. No complaints have been leveled by the State Board of Accountancy or other regulating authority and no corrective action has been taken against any of our team members.

TRAINING REQUIREMENTS RELATED TO GOVERNMENTAL AND SINGLE AUDITS

Anders follows the continuing professional education requirements of the AICPA, the Missouri State Board of Accountancy, the AICPA Governmental Audit Quality Center, the AICPA Employee Benefit Plan Audit Quality Center, the U.S. Government Accountability office, and other regulatory agencies as applicable.

Individuals who work on audits and attestation engagements subject to the Government Auditing Standards, including planning, directing, performing fieldwork, or reporting, complete at least 24 hours of CPE every two years that directly relates to government auditing, the government environment, or the specific or unique environment in which the audited entity operates.

In addition, auditors who do any amount of planning, directing, or reporting on Yellow Book assignments, and auditors who are not involved in those activities but charge at least 20% of their time annually to Yellow Book assignments, are required to obtain at least another 56 hours (for a total of 80 hours) of CPE that enhances their professional proficiency to perform audits or attestation engagements.

A decorative graphic consisting of several overlapping triangles in shades of blue, green, and purple, arranged in a cluster on the left side of the page.

AUDIT AND APPROACH

Services will be performed for year ended September 30, 2023, and will include:

- ◀ Annual audit of the financial statements
- ◀ Preparation and filing of Form 990
- ◀ Single Audit per the Uniform Guidance (formerly known as "A-133")

We will also provide:

- ◀ Evaluation of existing internal controls and advice on any material weaknesses or deficiencies
- ◀ The ability to meet your time requirements for completion of the engagement

- ◀ Attendance at other meetings with the Audit Committee and Board of Directors as necessary
- ◀ A management letter that offers fresh and practical recommendations, including internal controls and administrative controls and efficiency, for accounting and management consideration
- ◀ Advice regarding any required changes or modifications in Generally Accepted Accounting Principles
- ◀ Availability throughout the year to provide guidance on financial accounting and report issues

The financial statements of BSA are expected to include:

- ◀ Statements of Assets, Liabilities and Net Assets – Modified Cash Basis
- ◀ Statement of Revenues, Support, Expenses and Changes in Net Assets – Modified Cash Basis

The Single Audit reports and schedules are expected to include:

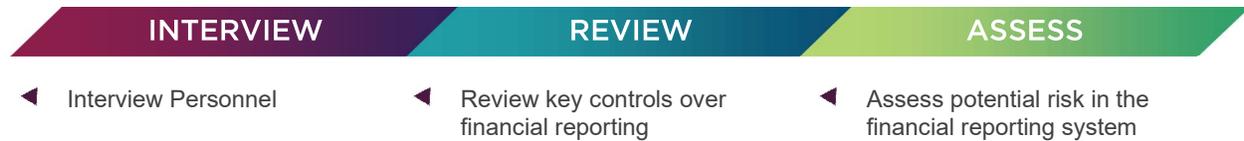
- ◀ Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance and other Matters Based on an Audit of Financial Statements Performed in Accordance with Government Auditing Standards
- ◀ Independent Auditor's Report on Compliance for Each Major Program, Internal Control over Compliance, and on Schedule of Expenditures of Federal Awards Required by the Uniform Guidance
- ◀ Schedule of Expenditures of Federal Awards
- ◀ Notes to Schedule of Expenditures of Federal Awards
- ◀ Schedule of Findings and Questioned Costs
- ◀ Summary Schedule of Prior Audit Findings

The audits are to be performed in accordance with the following:

- ◀ AICPA Audit and Accounting Guide, Not-For-Profit Entities
- ◀ Statements of Financial Accounting Standards as prescribed by the Financial Accounting Standards Board (FASB), as applicable, as incorporated in the FASB Accounting Standards Codification
- ◀ Auditing standards generally accepted in the United States as established by the American Institute of Certified Public Accountants (AICPA)
- ◀ Generally Accepted Government Auditing Standards
- ◀ Uniform Guidance

PLANNING PROCESS

To plan an efficient, effective audit, Anders will review your internal controls during the performance of interim audit procedures as part of our risk assessment process by:



Our planning will also include a pre-engagement strategic planning conference with BSA to determine the most effective means and format to obtain the engagement information. We will work to ensure all parties fully understand the goals and objectives of the engagement, and the duties and responsibilities for attaining them.

We take a substantive testing audit approach and do not rely on internal controls. Our audits will include tests of the accounting records and other procedures we consider necessary to enable us to express an opinion and to render the required reports. At the end of fieldwork, we will have a closing meeting with management to discuss our audit findings, if any, and review the draft financial statements. At the conclusion of the engagement, we will present the financial statements and audit results to the Audit Committee and Board of Directors.

USE OF TECHNOLOGY IN AUDIT

Our use of data mining and other auditing software enables us to examine large amounts of data in an efficient and effective manner, reducing the amount of time needed for testing while increasing the scope and accuracy. All information to which we have access will remain securely with BSA. Anders has worked diligently as “paperless” auditing has expanded to protect the confidentiality of client records and sensitive information. We place a great deal of emphasis on planning and the use of technology to create efficiencies, which eliminates many time-consuming tasks and simplifies the process. During both the onboarding process and the completion of the review, we will require a significant amount of documentation. Using secure file transfers, we can quickly and safely collect this information to start and complete the engagement in an efficient manner each year. We place a great deal of importance on leveraging technology as much as possible to minimize data entry errors and provide an efficient final product.

Members of the audit and tax staffs are trained in specific programs including, but not limited to IDEA, CaseWare, CaseView, Profx Engagement, CCH Document, Microsoft Office, Professional, Practice and QuickBooks. All information to which we have access will remain securely with BSA.

CLIENT PORTAL/AVII

Our secure portal and cloud-based collaboration tools provide a multi-level security approach with easy access and real-time information. Anders clients have the ability to access files, collaborate with others, and upload documents, which allows you to have access to your documents 24/7 during the engagement, while also providing a secure approach for documents to be viewed, downloaded, or uploaded. A Client Engagement Specialist can assist you every step of the way in using Avii.

COMMUNICATION AND TIMING

From the initial planning meeting to the delivery of the final reports, we emphasize open communication and regular status updates. The fieldwork for your audit will be scheduled to meet your timeline and the final reports will be provided by the dates promised. If, during our work, we identify significant recommendations to improve operations, reduce costs, and strengthen management control, we will discuss them with your management team at the completion of our attest services and provide you with our detailed observations. We will:

- ◀ Be available during the engagement and throughout the year to consult with you on the effects of any proposed transactions or contemplated changes in policies
- ◀ Establish a time frame for periodic status reports to management, as needed, throughout the planning, fieldwork, and wrap-up phases of the engagement to ensure all parties are informed of our progress. Such ongoing communication allows potential problems to be identified early, and resolved quickly

The planning and fieldwork phases of the engagement will take place on site, but we are also able to communicate in a variety of ways and will be available to BSA via live meetings, conference calls, webinars and email.

"[Anders] helped answer all of the questions we had and address the complexities involved. Jeanne even sat in on meetings with our Committee to answer questions about what this could look like and the impact it could have."

-Meg Stagina, Executive Director, The Greater St. Louis Dental Society

SCHEDULE

We understand our clients value timely completion of proposed services. We will adhere to your timeline and have deliverables to you when you need them. We have outlined a proposed timeline below for fiscal year ending September 30, 2023:

TASK	TIMING
Pre-engagement planning meeting with BSA Committee	Upon proposal acceptance
Interim fieldwork, including preliminary planning, risk assessment and predecessor audit inquiries	Early-mid March, 2024
Audit fieldwork	Late March-Early April 2024
Presentation of draft audit to management and meeting/presentation to Finance Committee	By May 10, 2024
Issue final audit report and letters	By May 31, 2024





ENGAGEMENT FEES

In all professional engagements, fees are an integral aspect of the proposal evaluation process. Anders strives to keep fees to a minimum while maintaining quality services.



MAKING ONGOING INVESTMENTS
to enhance our tools, techniques and technologies



BUDGETING SERVICES
on a task basis and monitor results against that budget



REGULARLY REVIEWING ENGAGEMENT PERFORMANCE
with clients



OBTAINING ADVANCE FEE ARRANGEMENTS
for any additional services

Anders proposed service fees for year ended September 30, 2023 are outlined below:

AUDIT OF FINANCIAL STATEMENTS	FEDERAL SINGLE AUDIT
\$25,000	\$6,500

We developed our not-to-exceed fee proposal based on anticipated hours of 130 - 140 hours at a blended rate of \$240 and assume no new pronouncements that would change the complexity of the engagement. The proposed fee includes ample time with partners and managers.



BILLING OUTSIDE FEE SCOPE

NO COST SERVICES

Our fee estimate will not include, and we will not charge you for, certain costs that we will incur to become fully familiar with BSA. Among the costs we will absorb are those associated with our initial review of administrative and accounting processes. Our willingness to absorb these costs represents our investment in establishing a productive, long-term relationship with your organization.

MISCELLANEOUS SERVICES

All services associated with this engagement are included in the fees quoted and are based on standards and laws that are currently in place. The quoted fees do not, however, include any additional services that may be requested/required outside the scope of this engagement. If additional services are needed, Anders will determine the scope of the additional services and provide BSA with a fee proposal. No work outside this engagement will be performed or invoiced prior to obtaining approval from BSA.

Our efficiency, combined with our rate structure, provides a cost-effective and reasonable rate solution. The proposed fees are based on our estimate of time to be spent on a recurring basis. Our fee quotes are maximum, all-inclusive quotes, unless unforeseen circumstances are encountered, or there are significant changes in the business operations.

Phone calls, emails, correspondence and appropriate meetings are included in the scope of the engagement fee. We do not want BSA or any of our clients to hesitate to contact us due to fees – our goal is to be an extension of your management and accounting team, and that is how we will operate.

REFERENCES

Our clients tell our story best and we encourage you to reach out to them. Anders has provided Audit and Tax services like this engagement to the sample of clients below:

VIOLENCE PREVENTION CENTER OF SW ILLINOIS

Darlene Jones
Executive Director
PO Box 831
Belleville, IL 62222
Darlene.jones@vpcswi.org

MISSOURI HUMANITIES COUNCIL

Ashley Beard-Fosnow
Executive Director
105 N Main St. Ste 108
Saint Charles, MO 63301
ashley@mohumanities.org

NATIONAL COUNCIL OF THE UNITED STATES, SOCIETY OF ST. VINCENT DE PAUL, INC.

Nancy Pino, CPA
*Chief Financial Officer – Chief Operating
Officer*
66 Progress Pkwy
Maryland Heights, MO 63043
npino@svdpusa.org

"We are more educated, more efficient, and more effective. I know that I have a team of responsive, communicative experts with an unbelievable knowledge base on my side, helping me to achieve the goals of MHC each and every day."

-Timothy G. Taylor, Sr., Fiscal Officer, Missouri Humanities Council



WHY ANDERS

When we propose on an engagement, we want to address the project scope but also provide a glimpse of other services which differentiate us in the marketplace and could provide future benefit, such as:

BANKING AND FINANCING ADVISORY

A beneficial financing structure and banking relationship can create new opportunities to improve cash flow and profitability to help companies succeed. To make sure the best structure is in place to meet the short- and long-term goals of our clients, we have in-house banking expertise to perform a full review of current debt and treasury management services and identify the best banking relationship for your business.

IT ADVISORY SERVICES

Our technology group is committed to maximizing what technology can do for you. Technology is a growth driver and should be at the top of your list when developing or enhancing strategic business goals. We'll put the right people in place to help find the right technology for your business and your budget. We provide virtualization/storage, managed services, business solutions, CIO services and more.

AFFILIATED BUSINESS



Claris Advisors, a registered investment advisor, is an Anders affiliate providing investment management services. Created at the request of certain clients more than a decade ago, Claris Advisors is not unlike the financial services arm found at most mid-to-large size CPA firms in St. Louis and around the country.

These are just a sample of the services Anders offers. Our comprehensive list of services also includes Outsourced Accounting and CFO Services, Business Transition Planning, Data Analytics and Business Intelligence, Buy-Side Due Diligence, Forensic Accounting, Business Valuations, Talent Outsourcing and others. We look forward to discussing those opportunities with you. Please see www.anderscpa.com for a complete picture of Anders.

Other Differentiating Factors Include:

OUR SPACE

One of the perks of being an Anders client is access to our training room for a board meeting or strategic retreat, at no charge to you.



DIVERSITY & INCLUSION AT ANDERS

Fostering a diverse, equitable and inclusive workplace benefits our staff, our clients and our community while empowering the transparent, collaborative, original and welcoming culture we work hard to build and maintain. In 2021, Anders took a strategic look at our efforts around Diversity, Equity and Inclusion and formed a task force to grow this strategy. From expanding our paid parental leave and EEO policies and organizational inclusiveness programs to supporting local, minority and women-owned organizations through sponsorships and firm events, we're focusing on embracing our differences, encouraging diverse ideas, perspectives and values and providing inclusive leadership education. Like the AICPA and the MOCPA, Anders is working to encourage and promote diversity and inclusion within the CPA profession and its workforce. Anders supports the National Association of Black Accountants (NABA) with sponsorships, seeks diversity in our participants in our Discover Anders program, and in our hiring. In the community, we are teachers in, and sponsors of the Diverse Business Accelerator affiliated with Greater St. Louis Inc. and with the University of Missouri-St. Louis. In addition, members of our team sit on a variety of boards with missions to improve the futures of those at-risk including Rung for Women, Jackie Joyner Kersee Foundation, Gene Slay Boys and Girls Club, Girls and Boys Club of St. Louis and others.

WOMEN'S INITIATIVE

Anders is dedicated to the advancement of women in our firm, community and profession. We have programs to help the women in our firm achieve their goals, as well as assist women business owners and others achieve theirs. The Anders Women's Initiative Network (WIN) has been recognized by the St. Louis Business Journal, Women's Foundation of Greater St. Louis, LEA Global and Accounting Today for our efforts in the advancement of women.

For additional information on our firm, you can reference our *About Anders* section in the exhibits of this proposal.

NEXT STEPS

As an advisor to BSA, we will offer you everything you need to meet compliance and regulatory requirements, as well as creative and innovative ideas to help your organization grow, all with a client service commitment that is second to none. Please let us know if you need any additional information from us. We are ready to take the next steps to transition you to the Anders family. Thank you for the opportunity.

TEAM BIOGRAPHIES





JEANNE M. DEE, CPA/CGMA

PARTNER, AUDIT AND ASSURANCE

[📞 \(314\) 655-0167](tel:(314)655-0167)

SPECIALTIES

Not-For-Profits

Internal Controls

Employee Benefit Plan Audits

Financial Reporting

Peer Reviews

Single Audits

ABOUT JEANNE

Professional Profile

Jeanne is a partner in audit and assurance where she specializes in audits of financial statements for not-for-profit organizations, government entities, employee benefit plans and closely-held businesses. She is the practice leader for the Not-for-Profit Group at Anders. Jeanne enjoys working with business owners, executive directors and board members to help them better understand the financial reporting process. As a leader on standards and regulations of the accountancy profession at the local, state and national level, Jeanne is knowledgeable and skilled in researching accounting principles and new or changing audit standards, and is a frequent author and speaker on these topics. View [Jeanne's latest insights](#) on important topics facing not-for-profits today.

Joined the firm in 2016

Education & Certifications

- Chartered Global Management Accountant (CGMA)
- Certified Public Accountant (CPA), State of Missouri
- B.S., Accounting, University of Missouri, St. Louis, MO

Professional Organizations

- American Institute of Certified Public Accountants (AICPA)
 - Auditing Standards Board Member (2019 – 2022)
 - Member of the Board of Examiners (2015 – 2019)
- Missouri Society of Certified Public Accountants (MOCPA)
- Missouri State Board of Accountancy
 - Board Member and Secretary (2013 – 2018)
- International Foundation of Employee Benefit Plans (IFEFP)

Community Leadership

- St. Louis Economic Development Partnership
 - Board Member (2019 – Present)
- Humane Society of Missouri
 - Board Member (2018 – Present)

Awards

- 2020 Top 100 St. Louisans to Know to Succeed in Business, St. Louis Small Business Monthly
- Women to Watch Award Recipient
 - Missouri Society of Certified Public Accountants (MSCPA) 2010



RAVEN S. LAWHORN, CPA

AUDIT AND ASSURANCE MANAGER

[\(314\) 474-0687](tel:(314)474-0687)

SPECIALTIES

Manufacturing

Not-For-Profits

Employee Benefit Plans

Audit And Assurance

Banking And Financial Institutions

Uniform Guidance

ABOUT RAVEN

Professional Profile

Raven works with businesses in a variety of industries as an audit and assurance manager. Raven's diverse range of clients lets her experience everything from how banks and financial institutions operate to how a small not-for-profit impacts the community. Through providing financial statement reviews and audits for her clients, she has gotten to know and work with incredible professionals in and around the St. Louis area.

Joined the firm in 2017

Education & Certifications

- Certified Public Accountant (CPA), State of Missouri
- B.S.B.A., Accounting, Southeast Missouri State University, Cape Girardeau, MO

Professional Organizations

- Missouri Society of Certified Public Accountants (MOCPA)
- American Institute of Certified Public Accountants (AICPA)
- International Foundation of Employee Benefit Plans (IFEBP)
- Young Professionals Staff Advisory Group (SAG)
 - Secretary



SUE A. YAEKEL

CLIENT ENGAGEMENT SPECIALIST

[📞 \(314\) 655-5557](tel:(314)655-5557)

SPECIALTIES

Project Management

Client Support

Strategic Growth

ABOUT SUE

Professional Profile

As a client engagement specialist, a role new to Anders in 2023 to enhance the client experience, Sue works with clients through Avii, our client communication platform. She trains clients on how to use the platform to aggregate important data in a single, secure online source to automate and streamline several processes. Sue provides positive client experience through high-quality communication to ensure timely responses to all client inquiries. Through her previous work in our Administrative Group, Sue has worked with many Anders clients and supported the Tax and Outsourced Accounting departments. Prior to joining the firm, Sue spent almost 10 years as a legal assistant in addition to serving as a paralegal for three years. She loves helping people and enjoys working directly with clients to ensure a great client experience.

Professional Organizations

- Women's Initiative Network

ABOUT ANDERS



ABOUT ANDERS

Founded as a local CPA firm 58 years ago, we have expanded to #77 in the Top 100 firms in the nation according to INSIDE Public Accounting.

Our Core Values, Mission and Vision are the foundation on which we go to market, base our work, and inspire our staff, clients, and community. To ensure we are continually building a culture where happy people deliver outstanding results for our clients and community, we base our actions on these values:



OUR MISSION

To serve as a catalyst for those striving to achieve their highest potential.

OUR VISION

To challenge ourselves to always embrace our entrepreneurial spirit, spearhead change and be the advisory firm of choice.

Every day, our clients and colleagues inspire us to do more, be more and achieve more.

GIVING BACK TO THE COMMUNITY

We believe giving back to the community is our responsibility. We encourage professionals and staff to not only join organizations, but to assume leadership positions in them. The chart below shows our involvement in 2022, and the total amount raised for our Charity of Choice in the last 15 years:

Read our [Anders 2022 Community Impact Report](#) for more information about how we make a difference.



RECOGNITION

Anders is one of the largest independent accounting and advisory firms in St. Louis and one of the largest in the Midwest with 400 partners and staff and revenues of approximately \$75 million. We are proud to be recognized by these organizations:



Other achievements include:

- Named to America's Best Tax and Accounting List for the 5th consecutive year in 2023, *Forbes*
- One of the Top Firms in Midwest for the 15th year in a row, *Accounting Today*.
- 4th Largest Accounting Firm in St. Louis, *St. Louis Business Journal*

LEA GLOBAL

LEA Global (LEA) is the fifth largest global accounting network in the world. Our clients benefit from our affiliation with over 140 certified public accounting firms located across the world through our membership in LEA. The knowledge and resources of LEA enable us to achieve greater results through customized networking solutions, shared goals, and value-added services. We work closely with LEA firms, so you receive results and expertise in a seamless fashion.



CLIENT TESTIMONIALS



FOLLOWING TOP-TIER SERVICE TO NAVIGATE CHANGE FOR THE GREATER ST. LOUIS DENTAL SOCIETY

THE SITUATION

Where service goes, Meg Stagina will follow. After all, as Executive Director of the Greater St. Louis Dental Society, the recognized professional resource for dentists in both their business and in their patients' care, she knows a thing or two about how exceeding service standards leads to patient acquisition and retention for her members. That's why she followed the Society's long-time accountant, Jeanne Dee, to Anders CPAs + Advisors when she left her previous firm.

"We were entering a new era and continuity of the high standards Jeanne had been providing was essential," said Stagina. "The fact that Anders had an entire department dedicated to not-for-profits and extensive resources was a bonus."

THE CHALLENGES

The Greater St. Louis Dental Society had an idea: they wanted to establish a new 501(c)(3) entity under their existing organization. Was this feasible? Did it make sense? How did one even begin? Would the Board approve it? When should it launch? The questions and uncertainties seemed endless, yet there was also potential for something great. "This was and is a huge undertaking; we are creating an entirely new financial entity," Stagina shared. "There were questions from a variety of different perspectives—operational, financial, etc.—and from a multitude of stakeholders. It is a very intricate and complicated undertaking."

“They dedicate resources to their not-for-profit department to back it up. I know I have a trusted, reliable partner with the Society on our journey.”

THE ANDERS SOLUTION

"They helped answer all of the questions we had and address the complexities involved. Jeanne even sat in on meetings with our Committee to answer questions about what this could look like and the impact it could have."

The team at Anders walked right beside Stagina and her team from concept to where this idea is now—an entity that is almost ready to launch and that will impact opportunities for future dentists in our region

THE RESULTS

"The consultative layer of service we receive from Jeanne and the team at Anders is unparalleled," said Stagina.

"We were creating something from nothing and she was there providing thoughtful, educated responses to guide us in the right direction."

Innovation can sometimes feel lonely, Stagina suggests, but she never feels alone with the Anders team backing the Society. She notes that Jeanne was instrumental in providing the Committee with the data they needed to feel secure in making a recommendation to the Board, which ultimately voted in favor of bringing this idea to fruition.

"Anders is a true partner; they have a passion for not-for-profits and their success," said Stagina.

ANDERS NOT-FOR-PROFIT GROUP

NATIONAL WOOD FLOORING ASSOCIATION – A POWERFUL PARTNERSHIP BUILT ON TRUST

THE SITUATION

With three separate and unique not-for-profit entities and a for-profit all housed under one umbrella, the National Wood Flooring Association has a number of complexities to consider in their financial planning -- and managing each of them without compromising any tax-protected status is critical to the continued support of their members.

So, as CEO Michael Martin first began searching for an accountant and advisor several years ago, he knew they needed the expertise to help navigate the intricacies of association planning and the service-oriented approach to do everything with an eye for member engagement and retention. That's what led him to Anders CPAs + Advisors.

THE PARTNERSHIP

When the Association needed guidance on restructuring in a way that would allow them to streamline processes, gain a full financial overview of every branch, and preserve the Association's tax status), Anders performed a full audit and created a comprehensive report detailing where improvements could be made. In addition, Anders defined what an in-house CFO role would look like and ultimately helped Martin realize that the most cost-effective solution was an outsourced Controller and CFO. They then helped the Association vet several potential partners to find the right fit.

But this was only the start of a beautiful relationship. Over the years, Martin and his team have turned to Anders for guidance on everything from tax planning to reporting – plus, Anders has helped the Association provide even more value to their own members. In 2018, after the landmark South Dakota vs. Wayfair decision that impacted how sales tax is collected in ecommerce transactions, Anders provided the NWFA with several resources to help their members understand how the decision could impact their businesses.

In 2020, Anders partnership was critical to helping the Association recover from financial losses and deliver valuable information to members in the wake of a global pandemic. In addition to helping the Association identify and pursue potential funding opportunities for themselves, Anders helped build several custom webinars to educate Association members on how to secure PPP Loan Funding – and extended invitations to NWFA members to attend Anders own webinars throughout the course of the pandemic. At every turn, according to Martin, “Anders provides value that goes above and beyond.”

“Their resources were deep, and I knew they could draw on the expertise of multiple practice areas to help us plan for each of our different organizations.”

ANDERS NOT-FOR-PROFIT GROUP

NATIONAL WOOD FLOORING ASSOCIATION – A POWERFUL PARTNERSHIP BUILT ON TRUST

THE RESULTS

With Anders continuous guidance, the Association’s accounting services are shored up and strategic, and they’ve seen cost savings, a better use of internal resources, and increased member retention. Thanks to their restructuring, the association’s auditing and reporting processes are both less complicated and less expensive, and they have the peace of mind of knowing that Anders will always proactively update them on anything that impacts their financial planning.

Whether helping with compliance and reporting, member engagement, or day-to-day accounting functions, it’s the Anders commitment to proactive communication and education that continues to make them an invaluable resource for the National Wood Flooring Association and their members: “We’ve never had a question that they didn’t find an answer for,” says Martin, “It’s a partnership built on longevity and trust.”

Learn more about the [National Wood Flooring Association](#) and the [Anders Not-For-Profit group](#).



“ We’ve never had a question that they didn’t find an answer for. It’s a partnership built on longevity and trust.”

TALK WITH AN ADVISOR TODAY.

www.anderscpa.com | 314-655-0555

PEER REVIEW





National Peer
Review Committee

March 01, 2021

Robert Minkler
Anders Minkler Huber & Helm LLP
800 Market Street, Suite 500
Saint Louis, MO 63101-2501

Dear Robert Minkler:

It is my pleasure to notify you that on February 24, 2021, the National Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is March 31, 2024. This is the date by which all review documents should be completed and submitted to the administering entity. Since your due date falls between January and April, you can arrange to have your review a few months earlier to avoid having a review during tax season.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,

A handwritten signature in black ink that reads "Michael Fawley". The signature is written in a cursive, flowing style.

Michael Fawley
Chair, National PRC
+1.919.402.4502

cc: Douglas Nickerson, Mark Hinsen

Firm Number: 900010001190

Review Number: 579996

Report on the Firm's System of Quality Control

January 7, 2021

To the Partners of Anders Minkler Huber & Helm LLP and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Anders Minkler Huber & Helm LLP (the "Firm"), applicable to engagements not subject to PCAOB permanent inspection, in effect for the year ended September 30, 2020. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (the "Standards").

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The Firm is responsible for designing a system of quality control and complying with it to provide the Firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The Firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control and the Firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included an engagement performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act; audits of employee benefit plans, audits of broker-dealers, and an examination of a service organization [SOC 2 engagements].

As a part of our peer review, we considered reviews by regulatory entities as communicated by the Firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Anders Minkler Huber & Helm LLP, applicable to engagements not subject to PCAOB permanent inspection, in effect for the year ended September 30, 2020, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Anders Minkler Huber & Helm LLP has received a peer review rating of *pass*.

