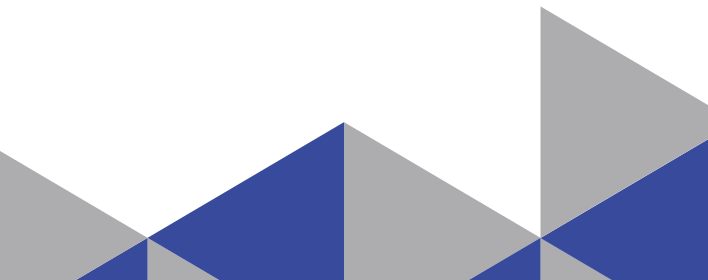




## LABOR UNIONS

HELPING LABOR UNIONS  
NAVIGATE CHALLENGES



## COMPLIANCE & REGULATORY REPORTING



HELPING YOU NAVIGATE COMPLEX CHANGES AND REQUIREMENTS

With constantly changing codes, laws and regulations, it can be difficult for many labor unions to keep up with tax reporting and stay ahead of regulatory and compliance updates. Our experienced audit and tax professionals remain current and well-versed in potential or upcoming legislative and regulatory changes so we can help your organization make more informed financial decisions. We help unions of all sizes plan, develop and implement tailored taxation strategies that fit their unique needs and get them closer to achieving their goals.

Our complete scope of tax services includes much more than preparation of 990's, 5500's and LM-2s, and other tax and regulatory filings. We also provide strategic planning and compliance expertise, making the entire process easier, more efficient and cost effective.

## ACCOUNTING & FINANCIAL SERVICES



FREEING UP YOUR TIME SO YOU CAN FOCUS ON WHAT MATTERS MOST

Running an organization is a complicated and stressful job, but adding in reporting deadlines, changing requirements and limited internal resources can make it even tougher. To help make our clients' lives easier and enable them to put the focus back on their union's mission and members, we offer a full suite of accounting and financial services. Our solutions simplify our clients' accounting functions by allowing them to delegate many time-consuming and tedious accounting tasks to our team so they can concentrate on what matters most.

Your union can engage our team to handle specific accounting and financial services for any length of time. We can also assist in the recruiting process, helping you find quality candidates to fill key accounting positions.



# VALUE-ADDED ACCOUNTING AND TAX SOLUTIONS FOR LABOR ORGANIZATIONS

Our professionals have decades of experience providing labor unions with value-added accounting, auditing, consulting and tax services that help them strengthen internal controls and enhance administrative efficiencies. As one of the nation's premier accounting and advisory firms for labor organizations, our experienced professionals build strong relationships with our clients and are trained to understand the unique regulatory and compliance requirements they face.

Our thorough understanding of relevant Department of Labor (DOL) and Internal Revenue Service (IRS) reporting and operational requirements help our clients overcome financial challenges. We provide seminars and webinars to help labor unions stay informed by providing education and guidance on key topics such as compliance with DOL and IRS regulations and reporting requirements, financial and accounting policies, industry best practices and more.

OUR LABOR UNION SPECIALISTS PROVIDE SOLUTIONS FOR MORE THAN 175 LABOR UNIONS

Our dedicated team is known for their responsive, hands-on approach. Our professionals work with labor clients ranging from small local unions to large international unions, in a variety of industries. Our capabilities include:

- ✧ Audit and Assurance
- ✧ Forensic and Risk Advisory Services
- ✧ Tax and Regulatory Reporting
- ✧ Accounting and Financial Services

“CALIBRE HAS PROVIDED THE AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES (AFGE) WITH CONSISTENT AND EXCELLENT SERVICE OVER THE YEARS. THEIR EXPERTISE AND KNOWLEDGE ABOUT LABOR UNIONS AND NONPROFIT ORGANIZATIONS HAVE ALLOWED THEM TO BE EFFICIENT WITH OUR ORGANIZATION EVERY STEP OF THE WAY.”

Faye Beardsley, Director of Finance,  
American Federation of Government Employees

## AUDIT & ASSURANCE SERVICES



EQUIPPING YOU WITH THE INFORMATION  
TO MAKE BETTER DECISIONS

Labor unions must stay ahead of pending changes in order to guarantee compliance. Our advisors provide our clients with a complete spectrum of audit, compliance and advisory services that give them the meaningful information they need to make better financial decisions.

Our value-added approach sets us apart from the competition. We offer your organization more than just an opinion—our auditors are specially trained to evaluate internal controls and make recommendations to improve or strengthen existing controls. We also provide best practice suggestions and other recommendations for improving financial and operational efficiencies.

## FORENSIC & RISK ADVISORY SERVICES



PROTECTING & SAFEGUARDING YOUR ORGANIZATION

All organizations may be exposed to fraud at some point, making it critical to design controls and procedures to manage the risk. Your key stakeholders want to know that your union is on sound financial footing. We can provide that assurance to your members, board members and other key stakeholders with our forensic and risk advisory solutions. We provide a full range of forensic and internal auditing services, allowing our labor clients to mitigate the risk of fraud and put in place effective fraud prevention processes and procedures.

Our experienced Certified Fraud Examiners provide fraud risk assessments that will identify and address internal control vulnerabilities before they happen. In the event of a potential fraud, our team utilizes specialized forensic techniques to uncover evidence of fraud and quantify the loss.

Calibre CPA uses a phased approach to our internal audit services. We help labor organizations of any size evaluate and improve their governance, risk management and internal controls with tailored, cost-effective solutions.



## ABOUT US

Calibre CPA Group is a full-service accounting and advisory firm with big capabilities. We focus on helping organizations nationwide make a difference through proactive value-added accounting, audit, taxation, forensic and consulting services.

With offices in the Washington, D.C., Chicago, IL, New York, NY, and Los Angeles, CA metropolitan areas, our specialists work hand-in-hand with our clients to help them stay ahead of financial developments and guide them through the complexities of accounting and reporting regulations.

## WHY CALIBRE CPA GROUP

- ✦ Highly personalized service through partner oversight and participation in all engagements
- ✦ Exceptional client roster showcasing expertise, experience and trust
- ✦ Continued investment in staff professional development to retain best and brightest
- ✦ Proactive sharing of constructive insights and recommendations with clients
- ✦ Honed processes and methodologies delivering efficiency and cost savings

# ARE YOU READY TO SEE THE DIFFERENCE?

CONTACT US TODAY TO SPEAK  
WITH ONE OF OUR LABOR  
UNION SPECIALISTS

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