



Rosalie W. Miller CPA
Principal

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MEET ROSALIE

Rosalie's nonprofit clients quickly realize that they get much more than an auditor who examines their financial statements. They come to value Rosalie as their dedicated advisor – someone who guides them step-by-step through the audit/review process and counsels them on the assorted (and often arcane) issues that invariably arise. The result? Rosalie helps her clients improve their internal procedures so that the audit/review process is more efficient and less stressful.

After an audit, Rosalie continues to partner with her clients, answering questions, advising on a range of compliance, governance and accounting issues, and sharing best practices and tools. Rosalie's practical, first-hand experience serving on nonprofit boards and the broad perspective gained through her work with businesses and individuals, help her to identify opportunities and challenges early on, allowing clients to act quickly...before problems become problems.

Thanks to Rosalie's expert guidance, nonprofit clients can rest assured that they are in compliance and are improving their processes, allowing them to focus on their real work – their organization's mission and success.

BACKGROUND

Rosalie joined Edelstein & Company in 2013 as a Manager on the Nonprofit Team. She works with a wide variety of nonprofit organizations of all sizes and with diverse missions. A frequent speaker, Rosalie presents training programs for clients, members of the nonprofit community and internal education for Edelstein's young professionals. She serves as the Vice President of Finance and Administration and is a member of the Finance Committee for her synagogue.

Early in her career, Rosalie worked as a CPA performing assurance and tax services for small, closely-held and mid-sized businesses. Her work expanded to include individual tax preparation and planning, and her focus eventually became nonprofit clients. Prior to joining Edelstein & Company, Rosalie was a Senior Audit Manager at Parent, McLaughlin & Nangle.

HOW ROSALIE CAN HELP

- Present an organization's story in the most advantageous way on its financial statements and Form 990
- Bring financial and tax compliance issues to the attention of management and the board so they can be quickly addressed

- Advise on best practices for governance and enhance a charity's transparency on Form 990
- Recommend ways to improve an organization's internal controls
- Help establish accounting policies and procedures
- Interpret difficult accounting and information return issues
- Help develop accounting and financial policies and procedures manuals
- Provide recommendations on how to best implement policies

RESULTS

- The treasurer of a nonprofit organization wanted to present the audited financial statements to the board in a more impactful way. Rosalie reorganized the financial statement to align with the way the internal budget was presented, making it easier to compare and understand. Rosalie also presented the financials to the finance committee, clearly and concisely communicating the relevant points so the members could make sound decisions and take appropriate action.
- An organization whose mission is to receive donations of laboratory equipment and then donate the equipment to developing nations needed a system to account for the donations and subsequent grants of the inventory. Rosalie helped the organization set up a system for tracking and recording the receipts and grants in its accounting records. The organization ultimately received a federal grant for its program, in part, due to the system that was put in place.
- A relatively new organization needed a first-time audit and did not have its policies and procedures documented. Rosalie helped the nonprofit draft a manual which the client then used as a training tool for its staff.

OUTSIDE THE OFFICE

I enjoy reading, vacationing and watching TV.

EDUCATION

Bachelor of Science in Accounting, Bentley College

PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants (AICPA)

Massachusetts Society of Certified Public Accountants (MSCPA)

Boston Philanthropic Advisors Roundtable (BPART)

COMMUNITY SERVICE

Temple Sinai of Swampscott and Marblehead, Treasurer and Finance Committee member

Cohen Hillel Academy, Finance Committee member