



# THE FUTURE OF ACCOUNTING

**30+**  
States

**20+**  
Industries

**200+**  
Members



## Cast Solution

We created the ability for business owners to make educated decisions through access to a bookkeeper, a tax professional, and a CFO at an affordable price point.

## The Archaic Problem

- ❑ For business owners, a CFO is too expensive, a quality bookkeeper is rare, and a tax professional shows up once a year.
- ❑ Historically, accounting firms have focused on compliance services rather than business services.

## What Makes Us Different

### Partner with experts.

Get a dedicated team of real professionals, focused on managing your accounting, tax, and bookkeeping needs. [We're committed to building long-term relationships that support the growth of your business every step of the way.](#)

### Industry tech stack.

Our team has carefully selected top-tier technology solutions for each industry, ensuring maximum efficiency for our services, which [saves you both time and money](#). As experts in small business technology, we implement the best solutions tailored specifically to your industry and business needs.

## Services

Bookkeeping • Accounting • Strategy and Finance • Payroll • Tax Filings • Advisory C-Suite • Projects • Budgets • Projections • Sales Tax • Tax Planning & Strategy • Compliance • Tax Savings • Audit Support

## Areas Of Expertise

Non-Profit • E-Commerce • Restaurants • Hospitality • Legal • Real Estate • CPG • Healthcare • Technology • Manufacturing • Retail • and more

## Who We Are

### We are business owners too.

We understand your journey and are entrepreneurs at heart. We're here to reduce the burden of being a business owner, putting ourselves in your shoes as we provide our services.

### Best of big for small.

We bring best practices and proven processes from the corporate world. Experience the benefits of enterprise-level solutions as you scale your operations and enhance your profitability.



# CAST IN NON-PROFIT

**1,000+**  
Consulting and Advisory  
Projects Completed

**20+ Years**  
Industry  
Experience

## Highly Qualified Team

Our bookkeepers, accountants, and CFOs have an extensive background and education in non-profits working with orgs upwards of \$65M with the capabilities to turn around cash flow mis management to cash flow success. Completed hundreds of budget projects for non-profits and presented at several audit and financial review committees.

## Emphasis on Compliance

Ensuring an organization follows the requirements of various funders can be daunting. Cast experts will help you stay in compliance with your funder and donor requirements

## Proven Track Record

Value of our services has proven successful for many non-profit organizations who we actively partner with for CFO services, monthly bookkeeping, budget projects, advisory, and more.

## Impact Focused

We continue to make an impact in the non-profit space by providing educational resources and industry specific member exclusive events at no additional cost.



## What Our Members Say



"Cast's approach to financial management allowed us to connect our vision to our planning and execution. Until working with them, literally side by side, we didn't think it was possible to find a firm that understood the specific needs of a growth-minded nonprofit. They provide a financial literacy solution to address the ever-expanding need for nonprofits to scale solutions without the infrastructure required"

***Chad Bernstein, CEO & Founder, Guitars Over Guns***

"Investing in Cast's services provides not only a level of expertise and efficiency that otherwise would be unattainable, but also results in transparent and timely financial management that enhances the organizations credibility and allows the organization to focus on its mission."

***Tania Rodriguez, COO, Voices for Children***

"Our firm has worked with Cast for various years and always feel confident referring their fantastic team to our clients for their accounting and CFO best practices in the non-profit industry."

***John-Paul Madariaga, CPA and Non-Profit Auditor***