

Capital & Endowment Campaigns: Best Practices for Accounting & Collaboration

With more schools embarking on capital and endowment campaigns, it is imperative that these campaigns are accounted for correctly. We'll talk with CFOs who have participated in capital campaigns up to as much as \$50M about how they handled a variety of unique transactions and/or endowment investment decisions. We'll also discuss accounting best practices, technical accounting treatments, and how CFOs can work most effectively with their Development Team and Head of School to tackle unique campaign challenges today and tomorrow.

Jeff Owens, CPA, Partner, Armanino LLP

Jeff has more than 16 years of experience in public accounting. He focuses on serving the nonprofit and private school sectors, where he helps clients keep up with the accounting and tax regulatory environment, maintain strong financial reporting processes and internal controls, and access the capital markets. He is a member of the American Institute of Certified Public Accountants and the Texas Society of Certified Public Accountants. He received a bachelor's degree and a master's degree in accounting from Southern Methodist University.

Dean Quiambao, CPA, Partner, Armanino LLP

Dean is a Business Development partner with Armanino. After spending 12 years as an auditor in Armanino's audit department, Dean transitioned to "Chief Relationship Builder" for the firm. Dean has been a frequent speaker at the NBOA Annual Meeting (7 years) and on NBOA webinars as well as speaking for the California Independent School Business Officers Association. Dean draws on Armanino's experience with over 170 private schools across the country to engage management, boards and finance and audit committees. They all frequently comment on his ability to bring to life the audit items that matter most, including his proven method of benchmarking data and key financial operating ratios.

Additional Information

Participants will earn 1 CPE credit.

Field of Study: Finance

Prerequisites: Basic knowledge of independent school finances

Advanced Preparation: None

Program Level: Update

Delivery Method: Group Live