



April 1, 2024

Montana Wilderness Association dba Wild Montana invites you to submit a proposal for the preparation of its yearly audited financial statements and related filings for the three-year period beginning with the fiscal year ending September 30, 2024. The organization does not require a federal single audit. The audit of Wild Montana's financial statements must be performed in accordance with generally accepted auditing standards.

The Organization

Wild Montana is a 501(c)(3) nonprofit organization. The mission of Wild Montana is to unite and mobilize communities to keep Montana wild. Our programs include:

- Protect the wild
- Enhance public land access
- Confront climate change
- Help communities thrive

Wild Montana was founded in 1958 as a grassroots organization dedicated to protecting Montana's wild places. Since then, the organization has expanded its work to every corner of the state to support the fight for Montana's wild future. Annual revenues are around \$3 million per year, and the organization employs 29 people located across Montana, with headquarters in Helena. The organization is governed by a board of directors, whose treasurer is assisted by a finance committee comprising both members and non-members of the board of directors. More information on the organization can be found at <https://wildmontana.org/>.

Skills, Knowledge and Experience of staff

The Organization's records are maintained by the accounting manager Evan Kulesa, CPA, with oversight from the executive director, operations director, and finance committee. Evan has worked in this capacity for 2.5 years and has been a part of 3 audit engagements. Previous to his work with Wild Montana, Evan worked as a public accountant. Evan maintains a valid CPA license in the state of Montana.

Services Requested

Wild Montana requires the following services:

1. Annual financial statement audit and accompanying management letter
2. Preparation of IRS form 990

Timeline

The organization's fiscal year ends on September 30. Books for the fiscal year are closed by October 31 with fieldwork for the audit to begin after November 1. Due to state charitable registration deadlines and board of director meeting schedules, the audited financial statements and Form 990 must be available by January 15, following the end of the fiscal year. We require the auditing firm to meet with the finance committee and board of directors to discuss a draft version of the financial statements.

The Proposal

All proposals must include:

1. Evidence of the firm's qualifications to provide the above services;
2. Background and experience in auditing nonprofit clients;
3. Statement of the firm's understanding of work to be performed
4. A proposed timeline for fieldwork and final reporting;
5. Proposed fee structure for each of the three years of the proposal period
6. Names of the partner, audit manager, and field staff who will be assigned to our audit and provide biographies;
7. A copy of your firm's most recent peer review report, related letter of comments, and the firm's response to the letter of comments; and
8. References and contact information from at least 3 comparable nonprofit audit clients.

Additional opportunities

In addition to the services requested for Wild Montana, there is a 501(c)(4) sister organization, Wild Montana Action Fund, that requires similar services in the same time frame. This proposal is only for Wild Montana; however, please note that there is an opportunity for the proposing firm to acquire the work for Wild Montana Action Fund. This engagement will be discussed in more detail with the proposing firms before entering into an engagement.

Your proposal must be received by May 10, 2024. Send electronic copies of the proposal to Larry Epstein (larryepstein62@gmail.com) and Evan Kulesa (ekulesa@wildmontana.org). Please do not provide printed proposals. The finance committee will review all proposals by May 24, 2024.

If you have any questions or would like further clarification of any aspect of this request for proposal, please contact Evan Kulesa using the contact information listed above.

Sincerely,



Larry Epstein, Treasurer