

# MTCPA Legacy Foundation Report

Fiscal Year 2024–2025

*Supporting the future of the accounting profession in Montana*

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## Our Mission

The Legacy Foundation exists to support the future of the accounting profession in Montana by funding scholarships, outreach, and leadership development opportunities for students and young professionals.

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## Revenue: \$18,332

These funds were generously contributed through:

- **Dessert Dash** – \$5,609
  - **Past Presidents Contributions** – \$8,190
  - **Both (PP @ DD)** – \$3,658
  - **Members @ Dues** – \$875
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## How Funds Were Used: \$18,165

Funded Initiative	Amount
Student Travel Stipends (6 x \$200)	\$1,200
Student Registrations @ Annual Conf. (6 x \$250)	\$1,500
AICPA Leadership Academy [Cattie Dunaway]	\$2,500
Campus Outreach	\$2,965
Industry Conference Sponsorship	\$4,000
University Scholarships (6 x \$1,000)	\$6,000



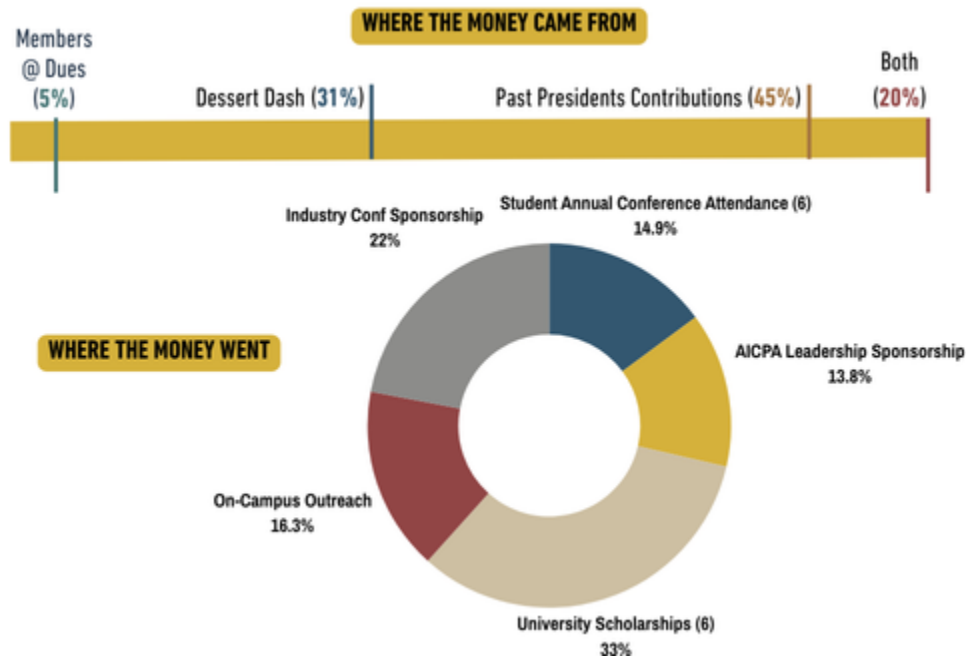
## 🏠 Ending Account Balances

As of the close of the fiscal year:

Account	Balance
Checking Account	\$32,789.73
Investment Account	\$293,707.64
Montana Community Foundation	\$174,789.44
Billings Community Foundation	\$25,258.23
<b>Total Assets</b>	<b>\$526,545.04</b>

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## 📊 Visual Snapshot



## 🙌 Thank You

These accomplishments are made possible thanks to the generous support of MTCPA members and donors. Your contributions help develop Montana's future CPAs through direct investment in education, leadership, and opportunity.

