



jitasa
NUMBERS FOR GOOD

CHOOSING THE RIGHT ACCOUNTING PARTNER

*What Every Nonprofit Should Ask Before
Choosing an Accounting Partner*



Choosing the right accounting partner is one of the most important decisions your nonprofit will make. The right firm doesn't just manage your books — **it strengthens your mission** by providing clarity, accuracy, and confidence in every financial decision.

Your financials impact everything — donor confidence, grant compliance, board decisions, and ultimately, your mission's ability to create impact. **Nonprofit accounting is not “regular accounting”**. It requires expertise in areas like fund accounting, grant restrictions, expense allocations, and reporting compliance. Firms without this specialization can expose your organization to compliance risks, audit findings, and loss of donor trust.

This guide is designed to help you understand what truly sets a great nonprofit accounting partner apart, what questions to ask, what standards to expect before you commit, and **how to avoid costly risks caused by providers who don't understand nonprofits**.





Experience

Why Experience Matters

From fund accounting to IRS 990 reporting, nonprofits operate under unique financial frameworks. A provider without nonprofit expertise can miss critical nuances, **leaving you exposed to compliance risks, audit findings, or loss of donor trust.**

What To Look For

Consider looking into a firm that's dedicated to serving nonprofits — one that understands the full spectrum of organizational types, sizes, and funding models. These firms will already understand the nuances of nonprofit accounting and will be able to anticipate challenges before they become problems.

At Jitasa, we exclusively serve **over 2,000 nonprofits of every size and mission.** This singular focus means our team, processes, and technology are all built around the distinct needs of the nonprofit sector.





Expertise

Why Expertise Matters

Nonprofit accounting brings unique complexities—from grant compliance to audits and technical reporting. **Access to subject-matter experts** ensures issues are handled accurately, efficiently, and in full compliance before small issues become costly problems.

What To Look For

Look for a firm that includes access to experienced CPAs, CFOs, and certified nonprofit specialists as part of your service, **not at an added cost**. The right partner has embedded expertise ready to step in when complex issues arise.

At Jitasa, we offer a deep bench of **specialists and credentialed professionals** with experience across nearly every nonprofit accounting scenario. When challenges surface, our experts are ready to step in and provide the precise guidance your organization needs **at no additional cost**.





Reliability

Why Reliability Matters

Your operations don't pause when someone takes time off, and neither do your accounting needs. Without **built-in coverage**, projects can stall, communication can break down, and critical deadlines may be missed.

What To Look For

Look for a firm with a **true team-based service model** — not with one that only relies on a single person. That way, team members will cover for one another, and you'll have consistent access to your accounting provider.

At Jitasa, every client is **backed by a full accounting team**. Multiple team members are familiar with your account, your timelines, and your unique needs, ensuring uninterrupted support — even when someone is out.



Responsiveness

Why Responsiveness Matters

When questions arise, you can't afford silence, especially when it comes to a topic as important as your nonprofit's finances. **Prompt communication** keeps your operations moving, prevents delays, and reinforces trust between you and your accounting partner.

What To Look For

Choose a firm that **clearly defines its commitment to responsiveness**. Reliable partners establish service standards and follow through consistently.

At Jitasa, we operate with what we call a 'Maniacal Sense of Urgency.' We pride ourselves on responding to client communications **within two hours or less**, ensuring your questions are addressed quickly and your work keeps moving forward.





Retention & Satisfaction

Why Retention & Satisfaction Matter

High client retention and satisfaction are two of the **clearest indicators of trust and service quality**. When clients stay year after year, it signals strong relationships, dependable processes, and meaningful results. It also generally means that clients are satisfied with the ongoing price of services over the years.

What To Look For

Choose a firm that measures client satisfaction with real data, not just testimonials. High Net Promoter Scores (NPS) and strong retention rates signal consistent value and trust. If firms promote these metrics on their own, take note of them, and if not, you can always ask for them in conversations.

At Jitasa, **we're proud to hold an NPS of 75**, far exceeding the accounting industry average of 38, and a client retention rate of 95%.



Specialization



Why Specialization Matters

Accurate, **compliant financial reports are the foundation** of your nonprofit's credibility. They guide board decisions, meet funder and donor requirements, and prepare you for audits. Even small errors can risk trust, funding, and IRS compliance –**making accuracy essential** to sustaining your mission.

What To Look For

An accounting firm with standardized processes, internal reviews, and certified staff **specializing in nonprofit accounting**. These practices promote accurate, transparent reporting and strengthen internal controls to protect financial data.

At Jitasa, we have documented workflows, thorough reviews, and oversight by staff who are **not-for-profit certified** by the [American Institute of Certified Public Accountants](#).





Transparency

Why Transparency Matters

How a firm charges reflects its priorities. **Hourly billing often rewards inefficiency** and can lead to higher costs over time. A fixed-fee model promotes transparency, communication, and efficiency, which keeps the focus on accuracy and results.

What To Look For

Choose a firm that **offers transparent, predictable monthly pricing aligned with shared outcomes** — not a nickel-and-dime approach that charges for every meeting or request.

At Jitasa, our **fixed-fee model** gives nonprofits clarity and control over their budgets while allowing our teams to stay focused on delivering consistent quality and value, rather than tracking time.



Quality

Why Quality Matters

Frequent turnover creates instability by slowing momentum and losing institutional knowledge. Firms with strong staff retention provide greater continuity, consistency and long-term value - **resulting in higher quality financial statements, account management and a better overall experience.**

What To Look For

Choose a firm that **values its people and demonstrates long-term staff stability**, a strong signal of culture, engagement, and consistent service quality. With high turnover common in accounting, ask firms directly about staff retention and engagement metrics.



At Jitasa, we're proud to have an **employee retention rate of over 95%**, placing us among the top tier of accounting firms nationwide. In an independent Great Place to Work® survey, **98% of our employees said Jitasa is a great place to work.**





Accountability

Why Accountability Matters

Even strong partnerships face challenges. What matters is **how quickly issues are identified, owned, and resolved**. A transparent escalation process ensures accountability, clear communication, and prompt resolution.

What To Look For

Look for a firm that **takes accountability seriously and has a clear, documented process for addressing issues if they arise**. The right partner should respond quickly, communicate openly, and take proactive steps to restore service quality and trust.

At Jitasa, we follow a defined Client Health Improvement Process whenever expectations aren't being met. This plan is personally led by senior leadership, ensuring visibility, accountability, and direct support **until the issue is fully resolved.**



Security

Why Security Matters

Nonprofits handle sensitive financial, donor, and payroll data that must be protected. A partner with **strong data security standards** keeps this information safe, confidential, and compliant.

What To Look For

Seek a firm with independently audited data security standards and **well-documented internal controls**. This ensures strong data security and demonstrates the firm's commitment to transparency and accountability.



At Jitasa, we're SOC 1 certified — a mark of our **commitment to safeguarding client information** through strong, tested, and transparent security practices.



Jitasa is where **nonprofit missions** meet **financial expertise**.

Jitasa's outsourced accounting model transforms how nonprofits manage their finances. From day-to-day bookkeeping and monthly reporting to grant tracking, fund accounting, tax filings, and strategic financial guidance. But what truly sets us apart is our **exclusive focus on nonprofits**.

For more than 15 years, we've listened to and partnered with nonprofit leaders, so we understand what they need: accurate financials, a dedicated team that knows their mission, transparent pricing, deep nonprofit expertise, and responsive support when challenges arise.

Our team-based service model means every organization gets the power of multiple specialists instead of relying on a single bookkeeper. Our standardized processes, internal reviews, and nonprofit-certified experts ensure accuracy. And with a fixed-fee structure, nonprofits gain **predictable costs and full visibility into their financial picture, without surprise invoices**.

As a **Certified B Corporation**, we hold ourselves to the highest standards of social and environmental responsibility. Our commitment goes beyond accounting. We measure our success by the impact we help our clients create.

That's why **more than 2,000 nonprofits of every size and mission trust Jitasa** to help them stay compliant, make confident financial decisions, and stay focused on what matters most: their mission.



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