



CAPABILITY STATEMENT 2024

EIN: 85-3065303
DUNS NO: 098227441
CAGE Code: 9LUP6
UEI: FL6AQK5F8VZ9

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COMPANY OVERVIEW

We are in the business of elevating businesses' profitability by providing insight and clarity to leadership through financial education, strategic planning, and personalized support. On average, we have saved our clients - 42% in operations expenses and 20% savings in data integrity with accurate reporting.

CORE COMPETENCIES

- Auditing
- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- Budgeting
- Business Tax Return Filing
- Business Process Improvement
- Cash Management
- Expense Reporting
- Forecasting
- Grant Management
- Human Resources
- Internal Controls
- Regulatory Compliance
- Risk Assessment
- Payroll Processing

PAST PERFORMANCE

In the last year, ACTvisory changed the frequency of presenting the financial reports to the Executive Director at Fort Worth Sister Cities International. Doing so resulting in a 32% reduction in overall expenses compared to the previous year. We also implemented digitally storing records to a cloud-based platform. This change has led to a 50% savings on office supplies and reduced man hours by 62%.

In 2021, with Harmony CDC moved 6,800+ vendors for the same non-profit client to an electronic payment system via ACH and reducing the manual check processing time by 63%. We also implemented digitally storing 85,000+ records to a cloud-based platform. This has led to a 60% saving on office supplies and a 56% reduction in man hours spent searching for information.

DIFFERENTIATORS

- Strong Performers
- Seasoned Management Team
- Certified Accountants
- Tax Preparers

NAICS CODES

- 541211 - Offices of Certified Public Accountants
- 541213 - Tax Preparation Services
- 541214 - Payroll Services
- 541219 - Other Accounting Services
- 541611 - Administrative and General Management Consulting

CERTIFICATIONS

- Woman-Owned Small Business
- Annual Filing Season Program
- Economically Disadvantaged Woman-Owned Small Business

KEY CLIENTS

- Harmony CDC
- Ft Worth Sister Cities International
- Founders Plaza Nursing & Rehab
- Solidago Nursing & Rehab
- Educational First Steps

