Date

Name of CPA Firm

Street Address of CPA Firm

City, State & Zip of CPA Firm

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:

[Your nonprofit’s name] is accepting proposals from qualified CPA firms to provide audit and tax services for our organization. We invite your firm to submit a proposal to us by [proposal due date].

The purpose of this audit is to ensure compliance with accounting principles and regulatory requirements, and to provide valuable insights that will help us improve our financial management practices.

*Insert one or two paragraphs describing your nonprofit, mission, revenue, number of employees, structure, significant programs and year end. State whether your nonprofit requires a Single Audit.*

Our organization requires the following services:

1. Annual financial statement audit
2. Federal Single Audit (*if applicable*)
3. Preparation of IRS Form 990
4. Management letter
5. Meet with selected board and staff members to discuss draft financial statements
6. Meet at least yearling with audit committee

All services listed above must be completed within XX days of the end of each fiscal year, in order for our board of directors to review each document prior to its submission to the appropriate recipients.

**Contact information for questions related to this RFP**

If you have questions or would like clarification of any aspect of this RFP, contact [name] at [phone] or [email].

**Proposal due date and submission instructions**

Send your proposal to [name] in PDF format via email at [email address] no later than 5:00pm on [date].

**Timeline for proposal process**

RFP issuance: [date of RFP issuance]

Proposal submission deadline: [proposal submission deadline date]

Proposal evaluation: [dates of proposal evaluation]

Final selection and notification: [date of final selection and notification]

**What to include in your proposal**

1. Firm overview: provide a brief overview of your CPA firm, including its size and location.
2. Relevant experience: describe your experience with nonprofit audits. Include a sample list of current nonprofit clients.
3. Engagement team qualifications: identify the partner and audit manager who will be assigned to our audit and provide brief bios of each.
4. Client references: provide at least three client references for whom your firm has performed audits for similar nonprofits. The clients you list must be familiar with the partner and/or manager assigned to our audit.
5. Proposed timeline: outline your proposed timeline for completing the audit, including key milestones.
6. Primary focus areas of audit: identify the key areas your audit will focus on.
7. Independence: discuss the firm’s independence with respect to our organization.
8. Fees for requested services: identify your annual fees for the requested services in this RFP. Separate fees should be shown for the years ending 202x, 202x and 202x.
9. Billing rates: identify your billing rates services that fall outside of the requested services in this RFP.
10. Peer review: include a copy of your firm’s most recent peer review report, the related letter of comments and the firm’s response to the letter of comments.
11. Describe how and why your firm is different from other firms, and why our selection of your firm as our independent auditors is the best decision we could make.

We look forward to receiving your proposal. Thank you for considering our request.

Sincerely,

[Your name]

[Your title]

Enclosed: audited financial statements and Form 990 for last fiscal year