

Six decades, one overriding focus: *our clients*

Founded in 1953, Green Hasson Janks is an independent accounting and business advisory firm located on the west side of Los Angeles. Collaboration and maintaining strong relationships are the cornerstones of success.

- Named “Beyond the Top 100: Firms to Watch” and “Top Firms: West” in the 2014, 2015, 2016 and 2017 *Accounting Today* Top 100 Firms
- Named a “Best of the Best” firm and “Beyond the IPA 100 Firm” by *Inside Public Accounting*
- Named a “Fastest-Growing” firm twice in *Beyond the IPA* 100 rankings
- Ranked 17th largest CPA firm in Los Angeles County
- Ranked 121st largest accounting firm in the nation by *Inside Public Accounting*

Vision

At Green Hasson Janks, we foster a flexible, entrepreneurial environment so our people achieve their personal and professional goals.

Our success is driven by retaining the best, diverse talent. We invest in our people and technology to deepen firm expertise and fuel sustainable growth. We partner with our clients locally and globally to deliver innovative solutions.

WE TRANSFORM VISION INTO REALITY BY SERVING:

- Organizations that improve our world
- Media companies that capture our imagination
- Businesses that enhance our health and wellness
- Food and beverage companies that nourish us

The GHJ Why

At Green Hasson Janks, we help our people and clients pursue their passions, build thriving businesses, and create a better future.

Contact Us

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Green Hasson Janks & 2017 Nonprofit Conference

#GHJNonprofit2017

Continue the conversation on social media!

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September 14, 2017

Green Hasson Janks & Nonprofits

Serving the Nonprofit Community,
is not just *what we do*,
...it is who we are.

Our Nonprofit Practice serves organizations by providing personalized and tailored services in the areas of assurance and advisory, taxes and business consulting. While we serve a variety of industries, including the food and beverage and entertainment and media sectors, we have a specialized team dedicated to public charities and private foundations.

Our Firm also supports the community and nonprofit organizations through donations of both time and money. Along with encouraging our staff to become involved in community projects, we host an annual Community Day each year. For Community Day, the Firm closes its doors for an entire day and all our partners and employees perform community service, raise funds and volunteer at one of our nonprofit clients or an organization within the community.

This year we volunteered at the Los Angeles Regional Food Bank preparing food bags for low-income seniors, women with infants, and children in Los Angeles County. Other organizations we have served include the Special Olympics of Southern California, Union Rescue Mission, Project Angel Food, AIDS Project Los Angeles, Los Angeles Conservation Corps and TreePeople, Inc., to name just a few.

But we don't believe volunteering is simply a once a year activity; we support our community year round. One example is when we were sponsors of the Special Olympics World Games in Los Angeles. Throughout the games our employees were encouraged to attend the festivities and cheer on the athletes as fans-in-the-stands. Everyone got into the spirit by making signs and taking time off work to attend the athletic events.



Green Hasson Janks Nonprofit Practice

For over 30 years, we have worked with both private foundations and public charities and currently have the privilege of providing audit, accounting, tax and consulting services to more than 100 nonprofit clients. We in fact provide services to 10 of the top 25 private foundations in Southern California.

Our staff is well versed on current nonprofit benchmarking and governance issues, and a number of our employees also serve on boards of nonprofit organizations, which gives them insight to the operational and financial challenges unique to nonprofits.

2017 Nonprofit Conference:

The Give and The Get: The Future of Philanthropy

Agenda

Refreshments and Networking

Mix and mingle with other nonprofit leaders

Welcome and Introduction

Leon Janks, Managing Partner, *Green Hasson Janks*

Donella Wilson, Partner and Nonprofit Practice Leader, *Green Hasson Janks*

Keynote Panel: *Equity in Practice*

Panelists: **Fred Ali**, President and Chief Executive Officer
Weingart Foundation

Faye Washington, President and Chief Executive Officer
YWCA Greater Los Angeles

Moderated by **Donella Wilson**, Partner, *Green Hasson Janks*

How to Evolve to Survive:

*Mergers, Partnering, Advocacy
and Innovation*

Panelists: **Rebecca Hamburg**, Founder
Rebecca Hamburg Consulting

John Maceri, Executive Director
The People Concern

Moderated by **Mark Kawauchi**, Principal, *Green Hasson Janks*

The Changing Role of Private Foundations

Panelists: **Nike Irvin**, Vice-Chair
Southern California Grantmakers

Joe Lumarda, Senior Vice President/Investment Counselor
Capital Group Private Client Services

Robert Ross, M.D., President and Chief Executive Officer
The California Endowment

Moderated by **Stephanie Yan**, Principal, *Green Hasson Janks*

Closing Remarks

Leon Janks, Managing Partner, *Green Hasson Janks*

Donella Wilson, Partner and Nonprofit Practice Leader, *Green Hasson Janks*

Happy Hour Reception

OUR SERVICES INCLUDE:

Accounting and Auditing Services

- Financial statement audits
- Yellow Book audits
- Single Audits
- Reviews and compilations
- Special projects
- Employee benefit plan and pension audits

Management Consulting Services

- Benchmarking and best practice models
- Training and education for Uniform Grant Guidance, Yellow Book and GAAP
- Cost allocation plans to maximize grant funding
- Board Governance assessment
- Internal control strengthening and assessment
- Enterprise Risk Management
- Merger and acquisition consulting
- Budgets and cash-flow projections

Tax Services

- Year-round planning and review for tax-exempt organizations, including:
 - IRS Forms 990, 990-T and 990-PF
 - State of California Forms 199 and 109
 - State of California Attorney General Form RRF-1
 - Various other returns
- Proactive tax research
- Corporate, pass-through and individual state and local tax planning and compliance

Special Guest Speakers

Keynote Panel: *Equity in Practice*



Fred Ali, President and CEO
Weingart Foundation

Fred has more than 35 years of senior management experience with nonprofit organizations, educational institutions, and government. He became the executive director of Covenant House in Los Angeles in 1991, and under his leadership, Covenant House California developed into a large, multi-service program working with homeless and at-risk youth in Los Angeles and Oakland. Ali was elected president of Weingart Foundation in June 1999. He serves on the board of the Mayor's Fund for Los Angeles, and previously served as board chair of Southern California Grantmakers. Ali also serves as chair of the board of advisors for The Center on Philanthropy and Public Policy, University of Southern California and as a senior fellow for the UCLA Luskin School of Public Affairs.



Faye Washington, President and CEO
YWCA Greater Los Angeles

Faye's 32-year government track record of management, personnel administration, legislative and budget policy development, strategic planning, and implementing budgets of over \$3 billion created the landscape for her groundbreaking tenure of leading the YWCA Greater Los Angeles in its mission of eliminating racism and empowering women. The YWCA Greater Los Angeles serves over 100,000 youth, families and seniors throughout LA County. Washington serves the boards of The United Way, The Links, Municipal Improvement Corp of L.A.; Workforce Investment Board; National Job Corps Assoc.; Downtown Breakfast Club; California Post-Secondary Commission; International Women Leadership Organization; and the Affirmative Action Association for Women.

The Changing Role of Private Foundations



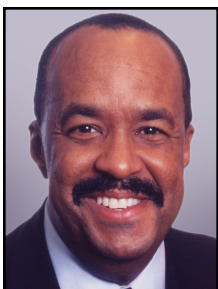
Nike Irvin, Vice-Chair
Southern California Grantmakers

Nike has over 20 years of experience in both leadership and consulting to nonprofit organizations, foundations and for-profit companies. Previously she served as Vice President, Programs for the California Community Foundation (CCF). For over six years, Nike oversaw more than \$130 million in charitable grants for core operating support to priority program areas in the arts, education, health, juvenile justice and special initiatives. Nike is currently consulting for the Aspen Institute/Anti-Defamation League and for the U.S. expansion of Australian-based High Resolves Initiative. Prior to CCF, Irvin served as president of The Riordan Foundation based in Los Angeles.



Joe Lumarda, Senior VP/Investment Counselor
Capital Group Private Client Services

Joe helps nonprofit foundations and endowments pursue their financial objectives through effective planning and investment management. Prior to joining Capital Group in 2006, Joe spent 16 years at the California Community Foundation as a Vice President for Development, executive Vice President and Chief Operating Officer. He also served as an independent Director for Capital Research and Management Company's Endowment Funds, a series of investment portfolios designed exclusively for nonprofit organizations. He is also a member of the board of the California Wellness Foundation, Give2Asia, the Drucker Institute, Asian Americans Advancing Justice and St. Joseph Healthcare Foundation.



Robert Ross, M.D., President and Chief Executive Officer
The California Endowment

Dr. Ross has an extensive background in health philanthropy, as a public health executive and as a clinician. During his tenure at The California Endowment, the foundation has focused on the health needs of underserved Californians by championing the cause of health coverage for all children, reducing childhood obesity, strengthening the capacity of community health centers, improving health services for farm worker and ex-offender populations, and strengthening the pipeline for bringing racial and ethnic diversity to the health professions. Robert is actively involved in community and professional activities at both the local and national level. He serves as a Member of the President's Advisory Commission on Educational Excellence for African Americans and is Co-Chair of the Diversity in Philanthropy Coalition as well as has been a member of several Boards over the years related to public health.

How to Evolve to Survive:

Mergers, Partnering, Advocacy and Innovation



Rebecca Hamburg, Founder
Rebecca Hamburg Consulting

Rebecca empowers organizations with the tools and knowledge to achieve their vision for a better world. Through strategic planning, technical assistance, and project management support, Hamburg enables both nonprofits and foundations to be agents of change. She provides guidance that assists grantmakers in understanding how they can support and engage in advocacy and other nonprofit organizations to engage their communities in public policy efforts through an understanding of federal tax and election law. Prior to starting her consulting firm, Hamburg served as West Coast Director for Alliance for Justice, a national nonprofit committed to ensuring that Americans have their voices heard when government makes decisions that affect their lives, and Program Director of the National Employment Lawyers Association, the country's largest organization of lawyers who exclusively or primarily represent employees in employment-related matters.



John Maceri, Executive Director
The People Concern

John is the Executive Director of The People Concern, which was formed in 2016 in a merger of OPCC and Lamp Community. As a long-time community volunteer, John has served on the board of the Business Alliance of Los Angeles (formerly the Valley Business Alliance) as a member, Vice President and two-term President. He is a Past Chair of the Westside Shelter and Hunger Coalition, and also served as a member of the Board of the Santa Monica Chamber of Commerce. John is also a past Vice President of the Board of North Valley Caring Services, a nonprofit that provides services to low-income children and families in the northeast San Fernando Valley, and is a former member of the governing board of the Children Affected by AIDS Foundation, a national funder of agencies providing services to children and their families infected and affected by HIV & AIDS.

Green Hasson Janks Speakers



Donella Wilson, Partner
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Donella leads the Firm's Nonprofit Practice. She has over 20 years of public accounting experience providing audit, accounting and consulting services and is a frequent guest lecturer and conference speaker on nonprofit financial management and governance issues. Committed to ending homelessness for women, Donella is president of the Board of Directors of the Downtown Women's Center. This year, Donella was also the recipient of the Women to Watch Award from CalCPA and honored as a Southern California Leadership Network (SCLN) "30-in-30," a year-long celebration honoring 30 outstanding SCLN alumni throughout 2017.



Stephanie Yan, Principal
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Stephanie has over 12 years of public accounting experience providing audit, accounting and general business consulting services. Before coming to Green Hasson Janks, Stephanie spent three years working in corporate accounting for both privately held and public companies. Her industry experience includes closely held entities operating in a wide variety of industries including private foundations, museums, import and distribution and real estate. Stephanie also has expertise with employee benefit plan audits.



Mark Kawauchi, Principal
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Mark has nearly 30 years of public accounting experience and is dedicated to the Firm's nonprofit clients with a specialty in healthcare. In addition to performing audits and reviews, Mark enjoys being a business advisor to his clients and providing them with personalized service to help them meet their goals. He is also a member of the Los Angeles Area Chamber of Commerce Health Care Committee, the Healthcare Financial Management Association, the California Society of Certified Public Accountants and the American Institute of Certified Public Accountants.



Additional Nonprofit Team Members



Leon Janks, Managing Partner
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Leon has over 30 years of experience in the areas of audit and accounting, tax planning and general business consulting. He advises his clients on matters related to strategic planning, profitability, mergers and acquisitions, and buying and selling businesses. Leon is a member of the California Society of CPAs and the American Institute of Certified Public Accountants. On a global scale, Leon represents Green Hasson Janks in HLB International, a 100-country network of accounting firms. Leon is on the Board of Directors of the Jewish Federation.



Tom Barry, Partner
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Tom's role at Green Hasson Janks is a combination of entrepreneur, partner, consultant, mentor and business advisor. With over 20 years of public accounting experience, he provides audit and accounting and consulting services to clients in a variety of industries including nonprofit. Tom believes in building a successful life one day at a time. He does that by leveraging technology to create a flexible schedule that allows him to be a father and husband in addition to fully committing to his career at Green Hasson Janks.



Margaret Karren, Partner
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Margaret is a partner in the Firm's Nonprofit Practice. She is passionate about serving the nonprofit community through her work at the Firm and her outside involvement in the community. She provides audit, accounting and consulting services to nonprofit clients as well as serves on the board and finance committee of California Hospital Medical Center Foundation. Additionally, Margaret is a board member and chair of the Community Service Committee of LA5 Rotary. She is also a former board member and chairman for Boys Town of California.



Satpal Nagpal, Partner
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Satpal has over 15 years of public accounting experience providing audit, accounting and general business consulting services. Satpal is an integral part of the Firm's nonprofit practice and has managed many engagements under the requirements of Uniform Grant Guidance. He also has experience in testing compliance requirements from various funding agencies relating to childcare, charter schools and head-start programs. Satpal is also a Board Member of Synergy Academies and the International Education Research Foundation.



Warren Shulman, Partner
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Warren has over 20 years of accounting, audit, tax and general business consulting experience. During this time, he has served clients in a wide variety of industries including nonprofits. Warren also conducts employee benefit plan audits for clients and has in-depth knowledge of AICPA, ERISA, DOL and IRS requirements related to these audits. Warren has completed the AICPA IFRS Certificate Program and is a member of the American Institute of Certified Public Accountants and the California Society of CPAs. Warren also serves on the Board of Trustees of Los Angeles Hebrew High School.



Akash Sehgal, Partner
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Akash leads the Firm's State and Local Tax Practice with a focus on multistate income and franchise tax, sales and use tax and credits and incentives. He has over 19 years of state and local tax experience with two Big Four firms in Los Angeles and Seattle. Akash assists his clients on complex state and local tax issues related to transactional planning, mergers and acquisitions, general day-to-day consulting and compliance. He is a frequent speaker for a variety of tax associations including Tax Executive Institute ("TEI") and the Council on State Taxation ("COST").



Lizbeth Nevarez, Senior Manager
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Lizbeth has nine years of public accounting experience providing tax and consulting services and leads the Firm's Nonprofit Tax Practice. Lizbeth is a frequent speaker at the Firm's nonprofit workshops. She has completed the Riordan Leadership Institute's Board service program through the Los Angeles Junior Chamber of Commerce. She has also taught courses on Form 900 basics and Private Foundations through Cal CPA. Lizbeth currently serves on the Board of Hillside and is also on the Board of Executive Service Corps (ESC).



Yulia Murzaeva, Manager
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Yulia has more than five years of public accounting experience providing audit, accounting and internal controls consulting services to clients, with a focus on nonprofits. She is dedicated to the Firm's nonprofit clients and has a Not-for-Profit Certificate II from the American Institute of Certified Public Accountants. Yulia is also a member of the American Institute of Certified Public Accountants, the California and North Dakota Societies of Certified Public Accountants and the Institute of Internal Auditors.



Amy Eybsen, Manager
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Amy has more than seven years of public accounting experience and is a Manager within the Green Hasson Janks Assurance and Advisory Practice. Amy provides accounting, auditing and transaction services to a wide variety of companies and organizations that span multiple industries within the greater Los Angeles area. Her expertise includes nonprofits and she is passionate about private foundations and internal controls consulting.



Narat Chanvirojn, Manager
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Narat has more than 15 years of public accounting experience providing nonprofit tax and accounting services. He is a tax manager within the Green Hasson Janks Nonprofit Tax Practice. Prior to working at Green Hasson Janks, Narat worked for another regional CPA firm that specializes in the nonprofit industry where he served clients that included everything from smaller nonprofit organizations to larger private foundations.



Andrew Johnson, Supervising Senior
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Andrew provides accounting, auditing and general business consulting, and his expertise in the nonprofit industry includes social service agencies, charter schools, member associations, museums, private foundations and audits with significant government funding, including federal awards subject to Single Audit requirements. Andrew is a core member of the GHJ University faculty where he leads in-house training sessions.



Melanie Horowitz, Supervising Senior
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Melanie provides accounting, auditing and transaction services to a wide variety of companies and organizations that span multiple industries, including nonprofit organizations. She has previously been a presenter for the Firm's nonprofit webinars. Additionally, Melanie has a passion for developing the Firm's younger staff and is a lead trainer in the GHJ University.



Veasna San, Supervising Senior
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Veasna has more than four years of public accounting experience providing accounting and auditing services. His expertise includes Uniform Grant Guidance - Single Audits. Prior to joining Green Hasson Janks, he worked at an accounting firm serving public charities and educational institutions. Clients served included smaller nonprofit organizations to larger public state universities.



Jonathan Cohen, Supervising Senior
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Jonathan is a senior associate primarily focused on nonprofits auditing and accounting with a specialization in nonprofit organizations with significant government funding, including federal awards subject to Single Audit requirements, primarily Federally Qualified Health Clinics (FQHCs). He also has experience with charter schools, private foundations, service organizations and community organizations.