

WHITLEY PENN SERVICES TO HIGHER EDUCATION

Whitley Penn has been providing audit services to educational institutions for more than 30 years. Our partners have been recognized for their experience and regularly conduct seminars on various accounting, auditing, and financial reporting topics for the Texas Society of CPAs and other CPA firms. Our experience provides us with a database of best practices that we can draw upon to provide our clients with the highest value in advice and recommendations.



Higher Education and Independent Schools

We have significant experience with colleges and universities as well as independent schools. Our professionals have experience in the areas of your greatest risk. We provide guidance and expertise on alternative investments, charitable gift annuities and other donation vehicles and endowments and unrelated business income tax (UBIT). We also have significant experience with federal funding including student financial aid and the requirements of OMB A-133. We support organizations such as National Association of College and University Business Officers (NACUBO) and National Association of Independent Schools (NAIS).

Audit, Assurance and Attestation Services

- Audit and review of annual financial statements
- Audit and review of Federal and State grants and related programs
- Preparation of Comprehensive Annual Financial Report (CAFRs), Regulatory and Statutory Statements, and Basic Financial Statements of public institutions
- Review of control environment, internal control structure and execution of controls
- Reviews, compilations and agreed upon procedure
- Fraud Investigation

For More Information, Contact:

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Whitley Penn has consistently been named among the top 25 firms in the country by *INSIDE Public Accounting*, a national publication. We believe our success has been accomplished by focusing on quality of our services and developing a quality team of professionals. Our culture of growth has allowed us to minimize professional staff turnover, which allows us to fulfill our commitment to staff continuity to our clients.



Consulting and Advisory Services

- Cost Containment and Reduction Analysis
- Seminars and training involving the implementation of GAAP, OMB Circulars, and other accounting, federal and statutory guidelines and procedures
- Internal controls and best practices advisory services
- Technical accounting and assistance regarding the latest in GAAP accounting and reporting standards and governmental practices
- Technical accounting assistance regarding the latest in GAAP accounting and reporting
- Financial accounting and reporting resources



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