

PRESENTED BY

**EP Enterprise Bank**  
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CREATE SUCCESS

## Budgeting, Finance and Compliance: Understanding the Basics



Non-Profit  
Collaborative

# Free Seminar for Non-Profits

- Understand general principles and practices for building a budget
- Learn effective financial reporting techniques
- Clarify compliance requirements for non-profit organizations
- Review tax and accounting guidelines

**Tuesday, November 27, 2018**

**8:30 – 10:30am** | Doors open at 8:00am | Complimentary breakfast provided

**Salvatore's Conference Center** | 354 Merrimack Street | Lawrence, MA

**TO REGISTER** or for more information, visit  
**[EnterpriseBanking.com/NPC](http://EnterpriseBanking.com/NPC)**.



**PRESENTER:**  
**JAYNE A. ANDREWS, CPA**  
Director of Not-For-Profit  
Services, Anstiss & Co., P.C.

Jayne is responsible for assisting non-profit clients meet their federal and state reporting requirements by planning and conducting audits, reviews and compilations of their financial statements, and the preparation of the related information returns.



**PRESENTER:**  
**JOE LUSSIER**  
Director of Finance, SVP,  
Enterprise Bank

Joe, a Chartered Financial Analyst and Certified Public Accountant, has nearly 20 years' experience in the financial industry. He specializes in operational efficiencies related to business' finances.



**PRESENTER:**  
**MICHAEL REID**  
Senior Finance Analyst, VP,  
Enterprise Bank

Michael boasts over 8 years' experience in banking, specializing in fixed income analysis, asset-liability management and financial reporting. He has served on numerous boards for non-profit organizations.