



Turning Financial Data Into Mission Momentum

August 13, 2026

Global Presence

Top 10

Global Network*

\$5bn

Combined Revenue (2023)

100+

Combined Countries & Territories

400+

Combined Offices & Locations

1,800+

Combined Partners

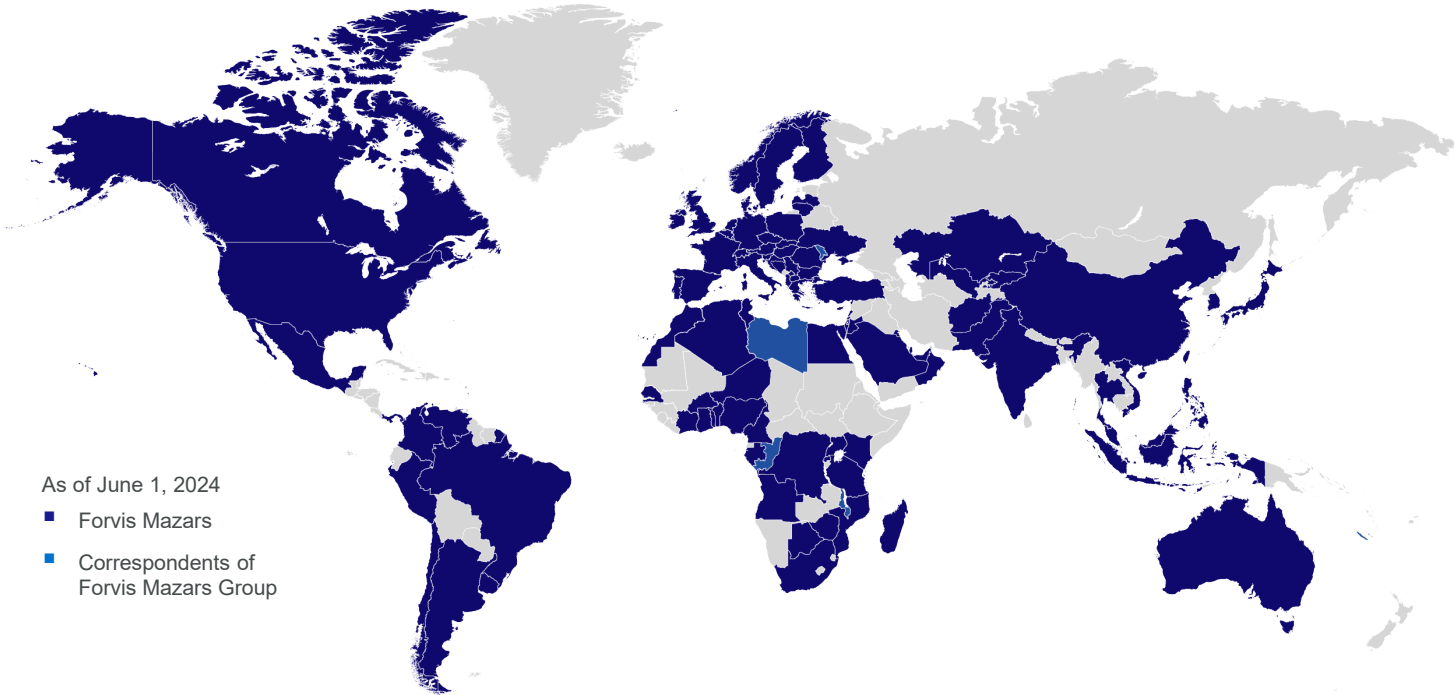
40,000+

Combined Employees

* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS \$1.7bn (€1.6bn), Mazars (estimated) \$3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



As of June 1, 2024

- Forvis Mazars
- Correspondents of Forvis Mazars Group

- | | | | | | | |
|--------------------------|--|--------------|---------------|-------------------|----------------|------------------------|
| ■ Afghanistan | ■ Cameroon | ■ Gabon | ■ Kuwait | ■ New Caledonia | ■ Senegal | ■ United Arab Emirates |
| ■ Albania | ■ Canada | ■ Germany | ■ Kyrgyzstan | ■ Niger | ■ Serbia | ■ United Kingdom |
| ■ Algeria | ■ Cayman Islands | ■ Ghana | ■ Latvia | ■ Nigeria | ■ Singapore | ■ United States |
| ■ Angola | ■ Chile | ■ Greece | ■ Lebanon | ■ North Macedonia | ■ Slovakia | ■ Uruguay |
| ■ Argentina | ■ China | ■ Hong Kong | ■ Libya | ■ Norway | ■ Slovenia | ■ Uzbekistan |
| ■ Australia | ■ Colombia | ■ Hungary | ■ Lithuania | ■ Oman | ■ South Africa | ■ Venezuela |
| ■ Austria | ■ Congo | ■ India | ■ Luxembourg | ■ Pakistan | ■ Spain | ■ Vietnam |
| ■ Bahrain | ■ Côte d'Ivoire | ■ Indonesia | ■ Madagascar | ■ Palestine | ■ Sweden | ■ Zimbabwe |
| ■ Belgium | ■ Croatia | ■ Ireland | ■ Malawi | ■ Panama | ■ Switzerland | |
| ■ Benin | ■ Cyprus | ■ Israel | ■ Malaysia | ■ Peru | ■ Taiwan | |
| ■ Bermuda | ■ Czech Republic | ■ Italy | ■ Malta | ■ Philippines | ■ Tanzania | |
| ■ Bosnia and Herzegovina | ■ Democratic Republic of the Congo (DRC) | ■ Japan | ■ Mauritius | ■ Poland | ■ Thailand | |
| ■ Botswana | ■ Denmark | ■ Jordan | ■ Mexico | ■ Portugal | ■ Togo | |
| ■ Brazil | ■ Egypt | ■ Kazakhstan | ■ Moldova | ■ Qatar | ■ Tunisia | |
| ■ Bulgaria | ■ Finland | ■ Kenya | ■ Morocco | ■ Romania | ■ Turkey | |
| ■ Burkina Faso | ■ France | ■ Korea | ■ Mozambique | ■ Rwanda | ■ Uganda | |
| | | ■ Kosovo | ■ Netherlands | ■ Saudi Arabia | ■ Ukraine | |

U.S. Presence

Leading U.S. Firm

\$2.24B

Revenue (FY 2025)¹

77

Markets

31

States

600+

Partners & Principals

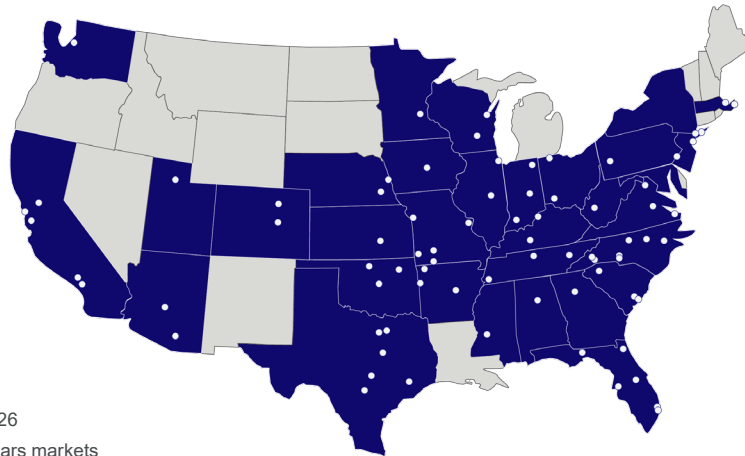
7,000+

Employees

84

Net Promoter
Score^{® 2}

(“World-Class” Ranking)



Alabama
Birmingham

Arizona
Phoenix
Tucson

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Francisco
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston
Brewster

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Philadelphia- Metro
Area
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond

**Washington D.C. Metro
Area**

Washington
Seattle

West Virginia
Charleston

Wisconsin
Appleton
Madison

Business Technology Services

We help organizations address business challenges through technology solutions.

Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, and business intelligence (BI) tools.

Our end-to-end and managed service solutions help clients achieve their digital transformation goals. Services include:

- | | |
|---|--|
|  Solution Assessment and Selection |  Implementation Project Rescues |
|  System Implementation and Integration |  Business Intelligence (BI) and Analytics |
|  Process and Technology Design |  Robotic Process Automation (RPA) |
|  Upgrades, Enhancements, and Automation |  Custom Application Development |
|  Training, Monitoring, and Support |  IT and Cybersecurity Managed Services |



Business Technology Services For Middle Market & Global Organizations



System Integration

ERP

- Microsoft Dynamics 365 Finance, Supply Chain Management, Project Operations, Commerce, Business Central (GP, NAV, AX)
- Oracle NetSuite
- **Sage Intacct, Sage 100, Sage 500, Sage Fixed Assets**
- Trimble Construction One, Viewpoint, Spectrum, Vista

Intelligence & Automation

- Microsoft Copilot Studio
- Microsoft Power Platform
- Microsoft Azure
- Workato
- Artificial Intelligence (AI)
- Robotic Process Automation (RPA)
- Custom Application Development
- Business Intelligence (BI)
- Solver Extended Financial Planning & Analysis (xFP&A)

CRM

- Microsoft Dynamics 365 Sales, Customer Insights, Customer Service, Field Service
- Marketing Automation



Managed Services

Cybersecurity

- 24/7/365 Security Operations Center (SOC)
- Managed Detection & Response (MDR)
- Managed Security Information & Event Management (SIEM)
- Vulnerability Management
- Managed Brand Protection
- Managed Incident Response
- Virtual CISO (vCISO) Advisory
- Partnerships with SentinelOne, Elastic, Qualys, and More

IT Operations

- Virtual Chief Information Officer (CIO)
- Network Operations Center (NOC)
- Cloud Infrastructure (Azure & AWS)
- Managed Server and Desktop
- Managed Backup and Recovery
- Procurement

Business Applications

- Microsoft Dynamics ERP & CRM
- Microsoft Power Platform
- Microsoft 365
- Oracle NetSuite
- Sage and Sage Intacct
- ISV Add-On Management
- Release and Upgrades Management
- Automated Testing Setup & Support
- End-User Training

Today's Presenters



Dan Prater

Senior Manager
Nonprofit-Education-Public
Forvis Mazars



Takoradi Harris

Pre-Sales Consultant
Sage Intacct
Forvis Mazars



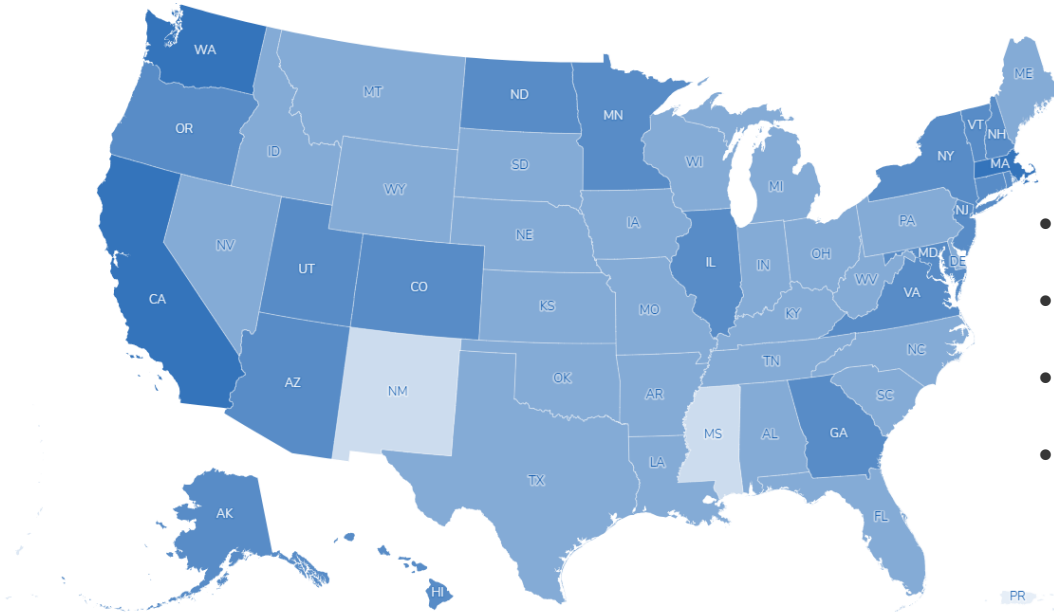
Chad Collett

Marketing Leader
Business Technology Services
Forvis Mazars

The National Nonprofit Landscape

1.8 million registered organizations

2.1 million organizations when including others¹



- **501(c)(3)** charitable organizations, foundations
- **501(c)(4)** social welfare organizations and civic leagues (political)
- **501(c)(6)** business leagues, chambers, trade associations
- **501(c)(7)** country clubs, fraternities, hobby groups

1

Urban Institute, National Center for Charitable Statistics (NCCS), "Business Master File (BMF) Datasets," accessed August 2026.

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**forvis
mazars**

The National Nonprofit Landscape

If the collective nonprofit sector was classified as a single private industry, it would rank third among all U.S. industries.

2

1.	Retail Trade	15.5 million workers
2.	Accommodations & Food Services	13.5 million workers
3.	Nonprofit Sector	12.8 million workers
4.	Manufacturing	12.7 million workers
5.	Construction	8.0 million workers

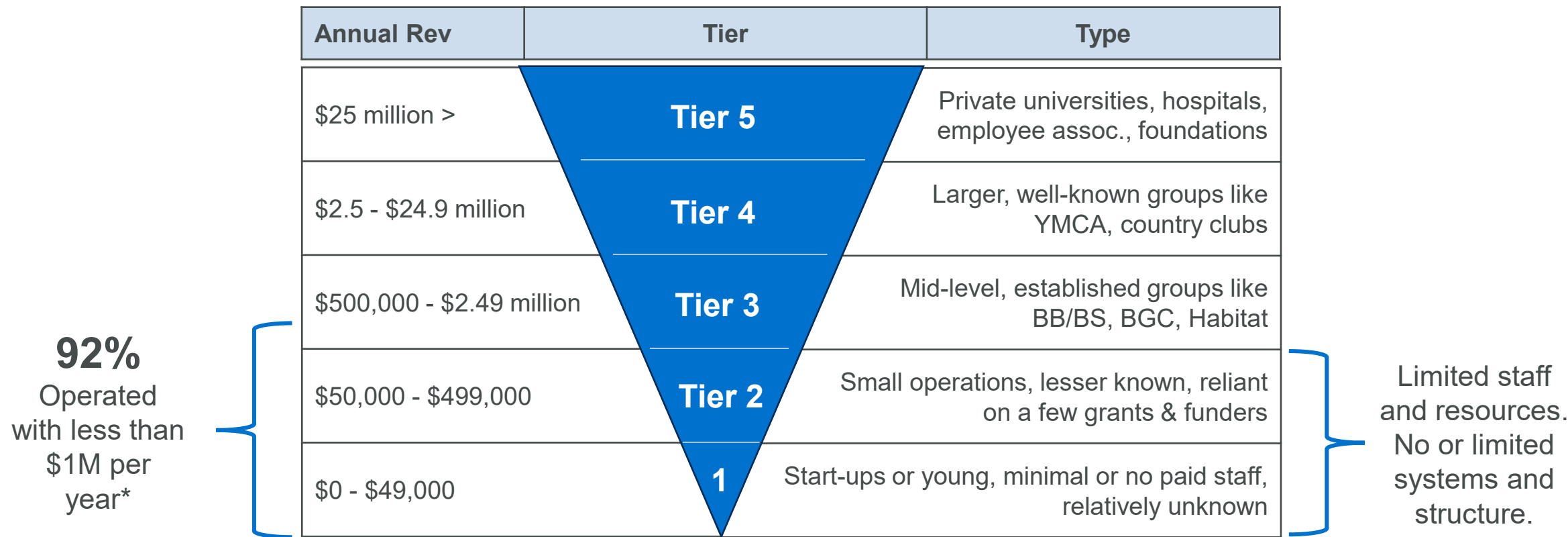


2

Nonprofit Quarterly, “Nonprofits by the Numbers: Sector’s Vital Role in American Life,” accessed August 2026.

The National Nonprofit Landscape

3



³ Candid, "Data Insights: Very Small Nonprofits Make Up the Majority of U.S. Nonprofits," accessed August 2026.

The Current Landscape

1/3 of US nonprofits reported disruptions due to federal funding cuts.⁴

70% of US nonprofits receive funding from federal, state, or local government.

- Unable to get reimbursed for services already performed.
- Grants were canceled before funds were received.
- Anticipating future funding losses.

Response?

Staff reductions

Program and Service cuts

Suspended projects

Increased requests for assistance



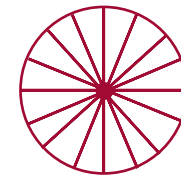
⁴ *Urban Institute*, "How Government Funding Disruptions Affected Nonprofits in Early 2025," accessed August 2026.

Nonprofit Sector Shift

- Donors care whether nonprofits are using best practices to address specific issues.
- They compare nonprofits in terms of performance and results.
- Warm & fuzzy vs. Evidence-based.

MOST Important in decision making process

1. Cause or Issue area
2. Program outcomes (results)
3. Management/Leadership
4. Peer opinions of organization
5. Best practices - EBP



Stanford PACS
Center on Philanthropy
and Civic Studies

Data Management

Activity = What you do  **Outcome** = Result of the activity

Programs	Fundraising	Marketing	Personnel
People served Improved situation Collaborations Program graduation % need being served	Gifts secured Donation growth Fundraising ROI Event attendance Grant proposal success Donor retention rate	Email click-rate Web page views Conversions Event attendance	Length of service Turnover rate Absenteeism rate Cost per hire Employee satisfaction Volunteer recruitment/turnover

Who Cares about Data and KPIs?

Internal: Staff, board, volunteers
External: Donors, foundations, other organizations, government, community, etc.

Data Management

Nonprofit Starvation Cycle

Funding limited to “direct program costs”

Software, systems, infrastructure sometimes viewed as “unnecessary” or “overhead”



The Digital Gap

Lagging data (looking in the rearview mirror)

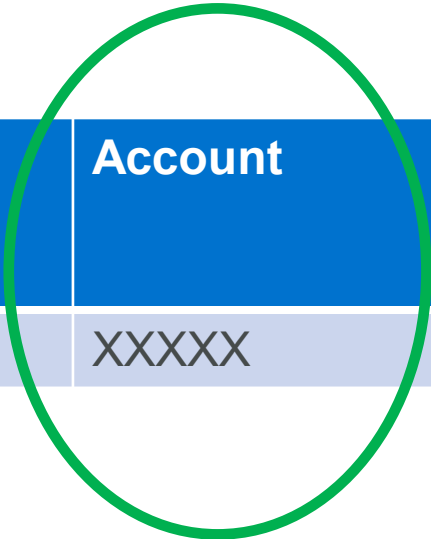
Outdated systems prevent growth and efficiency

Let's Talk Tech!

Sage Partner



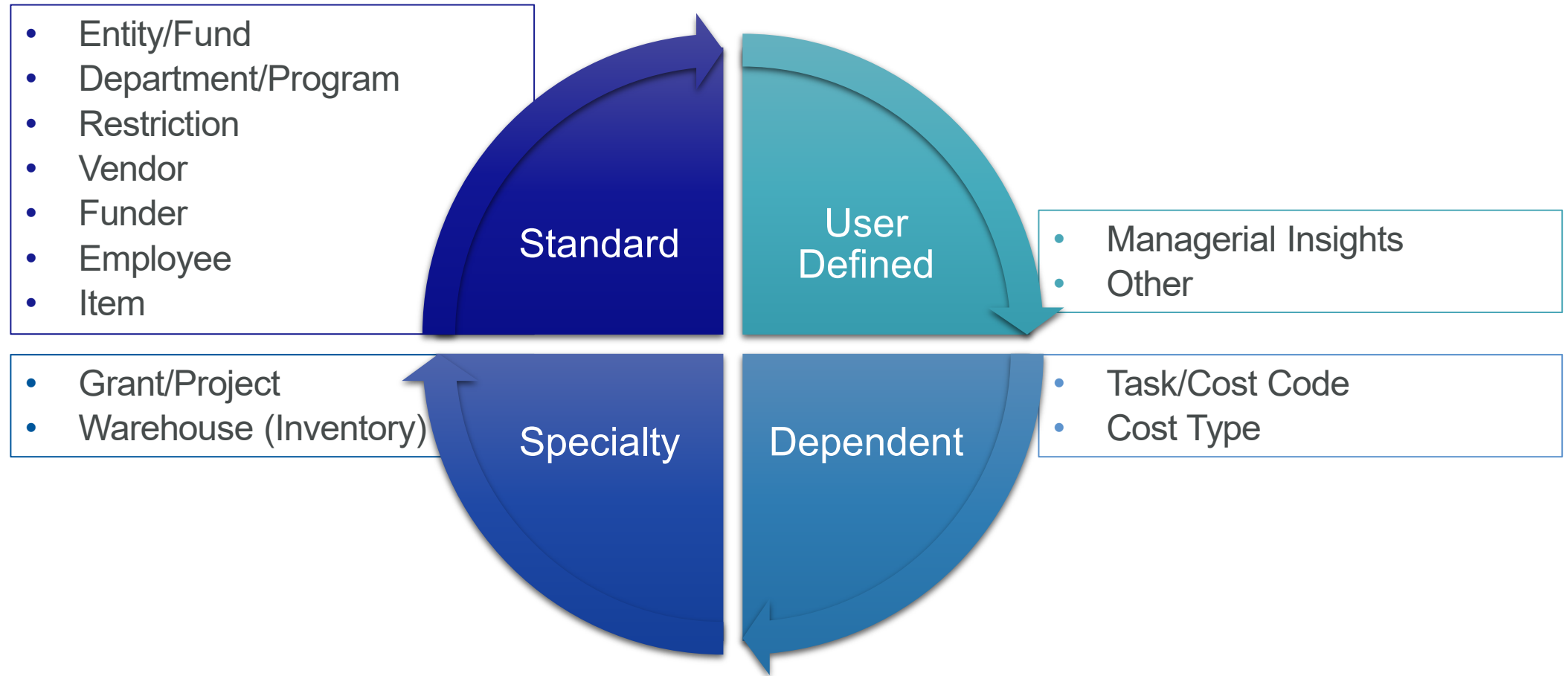
Traditional Chart of Accounts Management - Segments



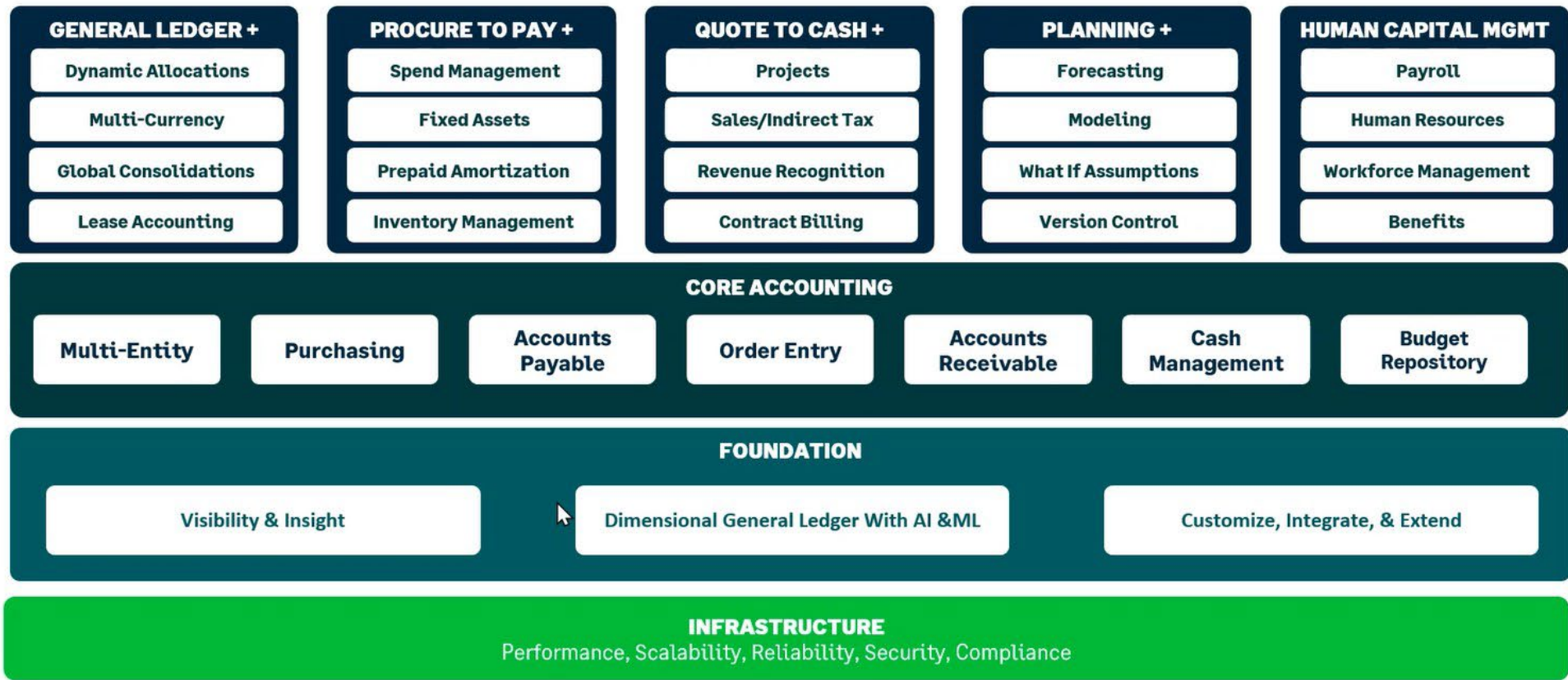
Entity	Account	Departments	Locations	Grants or Projects or Events	Funds
XX	XXXXXX	XX (alpha only)	XXX	XXXX	XX

Sage Intacct – it's a Dimensional World!

Unlocking powerful, customizable insights for financial analysis & reporting for each account.



Sage Intacct Solution Map



Q & A



Business
Technology
Services

Questions?

Contact

Forvis Mazars

Dan Prater
Senior Manager
Nonprofit-Education-Public
dan.prater@us.forvismazars.com

Chad Collett
Marketing Leader
Business Technology Services
chad.collett@us.forvismazars.com

Takoradi Harris
Pre-Sales Consultant
Sage Intacct
takoradi.harris@us.forvismazars.com

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