

A practical bookkeeping resource for your nonprofit clients

JRK Financial helps select nonprofits bring their books into a dependable monthly rhythm - current accounts, useful reports, clear communication, and real people to answer questions.

\$250K-\$3M ANNUAL REVENUE | REMOTE U.S. COLLABORATION | KALAMAZOO-BASED

WHEN TO INTRODUCE JRK

- Books are behind, unclear, or difficult to rely on.
- Monthly reconciliations, close, or reporting are inconsistent.
- The organization is moving beyond DIY bookkeeping or a prior bookkeeper.
- Leadership or the board needs clearer financial information.
- Payroll, grants, programs, or budget decisions need a steadier reporting rhythm.
- A growing nonprofit needs dependable support without adding a complex new system.

WHAT JRK CAN HELP WITH

Every engagement is scoped individually. The first conversation may cover monthly bookkeeping, catch-up or cleanup, reporting, payroll coordination, tax preparation or planning, financial analysis, and accounting-software support.

THREE EASY WAYS TO REFER

- 1 Warm email introduction**
With the nonprofit contact's permission, introduce the organization and briefly name the bookkeeping or reporting need.
- 2 Share the consultation link**
Send the organization to jrkinancial.com/schedule and ask it to include your name as the referral source.
- 3 Share this guide first**
Let leadership decide whether a conversation would be useful. No financial documents are needed for an introduction.

WHAT HAPPENS NEXT

- 1 Initial conversation**
JRK learns about the organization, books, software, and reporting needs.
- 2 Fit and scope review**
JRK determines whether the work is a fit and what support may be useful.
- 3 Clear next step**
The organization receives a practical recommendation without pressure.
- 4 Authorized coordination**
If an engagement begins, JRK coordinates with the adviser only as the organization approves.

A USEFUL WARM INTRODUCTION

"Hi Jason, I would like to introduce you to [Contact] at [Organization]. We have been discussing [brief bookkeeping or reporting need], and I thought a conversation with JRK Financial could be useful. [Contact], Jason and the JRK team help select nonprofits establish a dependable bookkeeping rhythm and clearer financial reporting. I will let you take it from here."

Please do not send bank records, tax returns, donor details, passwords, or other sensitive information in the introduction.

Ready to make an introduction?

jrkinancial.com/schedule

269-200-2910

jrkinancial.com

This guide describes general referral situations only. Every nonprofit engagement is reviewed and scoped individually. No referral compensation, service guarantee, or client-information sharing arrangement is assumed.