



## PLANNING MAESTRO

Planning Maestro is a cloud-native platform that delivers a competitive advantage through the ability to easily budget, forecast financial performance, analyze results and share critical information across the business.



## Modern FP&A for Nonprofits

- ▶ Get more granular control of project/program budgeting
- ▶ Spread allocations of any type of expense, grant, fund, and donation for tracking
- ▶ Control personnel expenditures by accurately tracking payroll, payroll taxes, and fringe benefits for each employee/employee type (seasonal for example)
- ▶ Drive staffing requirements for programs based on key assumptions such as projected funds
- ▶ Create valid projections of funds, grants, and charitable contributions and regulate seasonality and unknowns through continuous forecasting for an accurate picture of your balance sheet and cash flow
- ▶ Develop accurate, comprehensive income forecasts related to program services, contributions, gifts, and grants
- ▶ Use what-if scenarios to explore different income streams such as auctions, walks or runs, galas, gaming, etc.
- ▶ Meet reporting requirements by filing balance sheets and annual financial statements in a timely manner, properly detailing income and expenses

### LEADING NONPROFIT CUSTOMERS INCLUDE:

- ▶ Houston Food Bank
- ▶ Housing Authority of Snohomish County (HASCO)
- ▶ Wakeland Housing & Development Corp.
- ▶ Woods Homes
- ▶ Urban Ventures

*“Budget revisions in Excel would take me five or six hours - doing them in Planning Maestro, it’s 20 minutes - so a pretty significant time savings.”*

— Renee Sherman, Vice President of Finance, Urban Ventures