

## Merger, Acquisition and Program Integration Services

*As our international economy contracts, opportunities arise that enable organizations to grow and prosper. Your strengths as a nonprofit can power you through the ambiguity of these uncertain times, ensuring a vital future for your organization and the people it serves.*

In difficult times, you need an organizational structure that works efficiently to address the needs of your clients without increasing your financial burden. AKT's team of management and financial consultants can help you form and streamline your organization, ensuring a strong alignment between your mission, your work and your results. AKT has worked with a wide range of non-profits, making relevant organizational and financial changes to strengthen each organization. In the current economy, nonprofits are turning to mergers and acquisitions like never before. If you're merging with or acquiring another nonprofit, our experts can help you integrate, financially and organizationally.

Because we are management and financial experts, we see your organization holistically. We understand how business processes and finances work together.

AKT management consultants provide the following services to help you make the most of your nonprofit:

### Strategic Assessment

- Board Effectiveness Reviews
- Operational Reviews
- Financial Assessment
- Compensation Analysis
- Benchmarking and Performance Criteria

### Decision Making

- Board Facilitation
- Business Strategy Facilitation
- Leadership Coaching

### Planning

- Board Planning
- Organizational Planning
- Cash Flow Planning

### Implementation

- Business Transition Implementation
- Business Process Re-engineering and Optimization

Every nonprofit is different. While AKT can provide the most comprehensive package of financial and business services, we understand that each client has a specific set of needs to be met. We tailor our services to meet your needs, without unnecessary overhead.

## **Beyond Organizational and Financial Consulting**

When you need advice with a specific aspect of your organization's finances, our team can bring in experts to help you. Whether you have a simple benefits question or need a completely outsourced accounting team, we have the experts that you need.

### *Our integrated suite of services includes*

#### **Benefit Advisors**

Our team provides employers with benefit packages for their employees and executive benefits for high level and key employees. Our services includes plan design and implementation, ongoing communication, annual review of benefits, and a strong commitment to service.

#### **Tax Preparation and Planning**

Our experts in non-profit taxation and reporting can help you plan to meet the IRS compliance requirements of the 990 form for your organization.

#### **Outsourced Accounting and Finance**

An infusion of skilled accounting and financial assistance can enable you to meet deadlines without damaging ongoing operations.

#### **Retirement Plan Services**

We work with you to establish an employee retirement benefits program that meets your needs as an employer as well as the needs of your employees.

#### **Wealth Advisors**

AKT's advisors help you protect your assets for tomorrow by enabling you to make smart financial decisions today. Our professionals provide objective and independent, fee-based investment services.

#### **Legal Advisors**

We have lawyers experienced in all aspects of business transitions who can work as trusted advisors for you. Should your organization require specialty legal counsel, we will assist you in finding the specialists you need.

We would like to work with you to develop and implement the best business and financial operations for your organization. As a leading management consulting and accounting firm with 35 years of experience, we have achieved sustainable growth by listening to our clients and performing the services they need on-time and within budget. We are happy to meet with you to discuss your organization's needs and answer your questions. Please call us at 503-620-4489.



*Personal. Local. Global.*

## About AKT

At AKT we're *personal.local.global*. We're personally committed to each client's success. We're local to our communities and focused on providing expertise to specific industries. We're global with an international presence and a holistic, inclusive approach to service.

As a full-service firm, we specialize in working with several industries, including government, nonprofit, healthcare, agriculture, telecommunications, construction, manufacturing, utilities, and business services. Our government and nonprofit professionals focus solely on providing organizational and financial services to government and nonprofits. They are trained to address the unique issues that government and nonprofits encounter. Our consultants retain and improve their skills and competencies through active membership in professional associations such as the Institute for Management Consultants and Alliance of Merger & Acquisition Advisors.

AKT LLP ([www.aktservicesllp.com](http://www.aktservicesllp.com)) was founded in Oregon in 1973. We have offices in Oregon, California, Alaska and India.

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## **Our Team**

At AKT, we believe that our consultants are our greatest resource. We work to attract well-rounded individuals with high levels of expertise in the fields of business organization and financial management. We hire professionals with the personal integrity to put team performance first. We invest in each team member by providing ongoing opportunities for education and advancement. By investing in our human resources, we're able to provide the highest quality services to our clients.

### **Nanita McIlhattan, CMC**

Consulting Manager

Nanita joined AKT, LLP in 2007 after 14 years in finance with Intel Corporation and 6 years as a consultant and interim executive in the public sector. She is a Certified Management Consultant and has an undergraduate degree in music education from St. Olaf College and a Masters of Business Administration degree from Purdue University.

During her career with Intel and working as a consultant with public sector clients, Nanita completed strategic change projects in a variety of complex financial, operations and organization development situations.

Nanita frequently teaches workshops and seminars on a variety of financial and organizational improvement topics.



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**Geoff Guilfooy, CMC, CGFM**

Principal

Geoff Guilfooy is a principal of AKT and leads public sector, nonprofit and management consulting services. His direct experience involves project management, organizational assessment and redesign, business process redesign, group facilitation, strategic planning, focused operational reviews and leading change processes. He has been the project manager for dozens of high-level, complex public sector projects with several state, county, and city organizations. He has provided executive development and coaching to senior managers.

Prior to joining AKT in 1995, Geoff served in executive management positions in Oregon state government for more than 17 years. He served for 5 years as Deputy Director for the Department of Consumer and Business Services and 7 years as Assistant Administrator for the Executive Department Budget and Management Division (now Department of Administrative Services). He has extensive working knowledge of government organizations, systems, policies, and operating procedures.

Geoff has a Masters of Business Administration degree, is a Certified Management Consultant, Certified Government Financial Manager, and also serves as an executive professor at Willamette University's Atkinson Graduate School of Management.



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**Martin D. Moll, JD**

Principal

As the Managing Principal of AKT LLP's healthcare division, Martin Moll works with a large variety of organizations including hospitals, multi-specialty and single specialty clinics, and long-term care providers. With over 17 years of experience, Martin is nationally recognized as an expert on best practices for clinic administration. He assists clients with issues related to hospital and clinic mergers and spin-offs, physician compensation arrangements and tax and business planning. Martin's clients include for-profit and tax-exempt organizations.

Martin is the past chair of the Board of Directors of the United Way of the Columbia Willamette. He is also an adjunct professor of Business at Washington State University. Martin is a member of the American Bar Association: Tax and Health Law Sections, and on the Accounting Board at Portland State University.

Martin received his B.A. in Political Science from the University of Oregon. He also holds a J.D. from Northwestern School of Law at Lewis and Clark.