



Charitable Gift Annuity Statements

Proven

As the largest bookkeeper of NY, NJ, and CA annual Charitable Gift Annuity statements, our clients include national and multinational charities with gift annuity components. Decades of combined experience and attention to detail make us the industry leader. Our goal is to provide world class service in a timely manner.

Process

We leverage the latest in technology to bring convenience and security to all clients. Clients work with us through our innovative drag and drop portal, making sharing simple and secure.

Statements are prepared, reviewed, and forwarded back to the client with definitive instructions to complete the filing. We are receptive and promptly answer any questions.

We are your essential Charitable Gift Annuity Partner.



We make it easy!

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