



## Request for Proposal (RFP) for Accounting Services

### I. Executive Summary

Westchester Land Trust, a 501(c)(3) organization, is seeking proposals from qualified Certified Public Accountants (CPAs) or CPA firms to provide professional accounting, financial oversight, and advisory services. The selected firm will work closely with our leadership team to ensure accurate financial reporting, compliance, and strong fiscal stewardship with an estimated monthly time commitment of 10-15 hours.

### II. Organizational Background

Westchester Land Trust (WLT) works together with public and private partners to preserve land in perpetuity, and to protect and enhance the natural resources in our communities.

WLT was founded in 1988 and is accredited by the Land Trust Alliance. Since 1988 we have protected more than 9,300 acres of land in Westchester and eastern Putnam Counties. We own and manage more than 1,250 acres and more than 75 miles of trails across a nature preserve network of 34 properties, much of which is free and open to the public.

- Annual operating budget: Approximately \$2 million. For Financial Information, please follow this [link](#)
- Primary funding sources: Individuals, Foundations, Corporations and Governments
- Staff: 12 Full-Time, 1 Part-Time
- Accounting system: QuickBooks Online

Please visit: <https://westchesterlandtrust.org/> for more information.

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### III. Scope of Services

The CPA or CPA firm will be expected to perform the following services:

- In coordination with WLT staff, monthly reconciliation and recording of investment and endowment activity
- In coordination with WLT staff, monthly reconciliation of financial accounts including monthly bank statements.
- Foundation, Local, State and Government Grant accounting expertise especially as it relates to reimbursable state and federal grants.

- Ongoing oversight and support to internal bookkeeper regarding accounting bookkeeping matters.  
Ex: pledges receivable, prepaid expenses, depreciation, monthly financial reporting
- Year-end financial reconciliation support
- Consultation on accounting standards, policies, and best practices
- Availability for quarterly board or finance committee presentations, as needed
- Independent audit support and review
- Budget support
- Review of 990 prior to filing and board recommendation

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#### **IV. Proposal Requirements**

Interested firms or individuals should include the following:

- 1. Background and Experience**
  - Description of your firm and experience with nonprofit organizations
  - Resumes or CVs
  - Similar 501(c)(3) organizations you work with
  - Staffing configuration
  - Potential conflict disclosure
- 2. Fees**
  - Total fee estimate and hourly rates
  - Breakdown of costs
- 3. References**
  - Contact information for 2–3 nonprofit clients similar in size and scope

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#### **V. Evaluation Criteria**

Proposals will be evaluated based on:

- Experience with nonprofit organizations
- Cost-effectiveness
- Client references

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#### **VI. Submission Instructions**

**Submit proposals via email to:** Carissa Gospodinoff, [Carissa@westchesterlandtrust.org](mailto:Carissa@westchesterlandtrust.org)

**Deadline:** January 30, 2026

**Proposed Start Date:** March 1, 2026

Questions may be directed to: Carissa Gospodinoff, Operations, 914-234-6992,

[Carissa@westchesterlandtrust.org](mailto:Carissa@westchesterlandtrust.org)

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## **VII. Additional Information**

Westchester Land Trust reserves the right to reject any or all proposals and to request additional information from any bidder.