JMT CONSULTING

INNOVATE 2017

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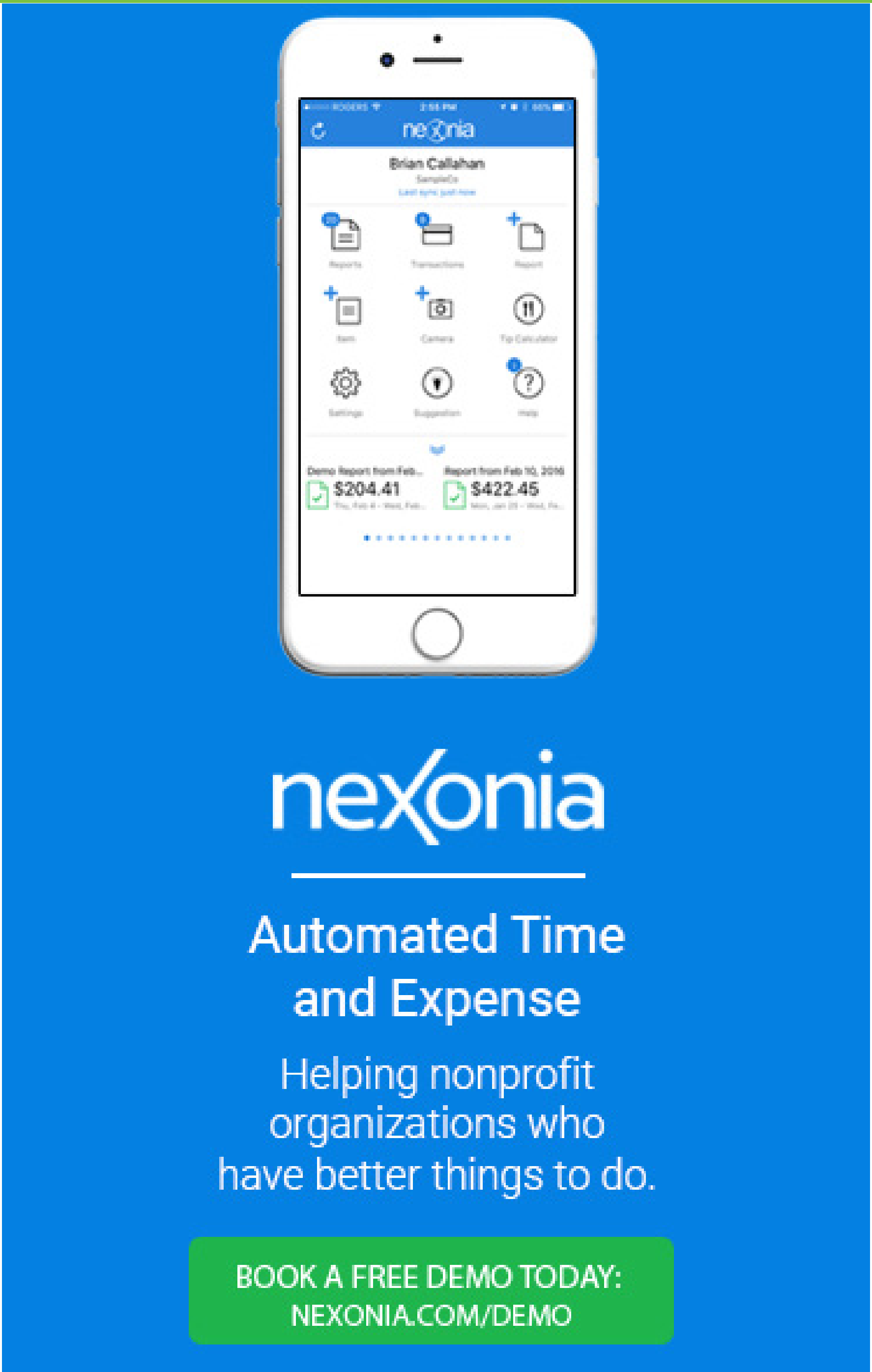
OCEANS OF OPPORTUNITY
MOHEGAN SUN, CT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Welcome to INNOVATE 2017

On behalf of JMT Consulting Group, I want to welcome you to our annual conference, INNOVATE 2017. We are so happy you have chosen to join us.

Regardless of whether you are a first-time attendee or a conference regular, INNOVATE is a fun, unique way to learn and network with your peers. It is also a great opportunity to meet the JMT staff, who are dedicated to making this experience a good one for you.

I am proud of the fact that clients have consistently shared with me that INNOVATE is one of the very best conferences they attend. That is our goal as we totally appreciate the investment your organization is making and we want you to be able to say "INNOVATE is the best money we've spent"

The JMT Consulting Group staff is on-hand to help you with anything you might need be it software, training, meetings, as well as any questions or concerns.

Thank you again for attending and we hope you enjoy our conference.

Sincerely,
Jacqueline M. Tiso- Founder & Chief Executive Officer
JMT Consulting Group

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Save The Date!

April 10-12, 2018
Marriott Newport, RI
Join us as we set sail for Innovate 2018 in beautiful Newport, Rhode Island. Experience the best hands-on training, thought leadership and educational sessions for the lowest cost. With our 100% guarantee, you cannot afford to miss this event. Make sure you include this training opportunity in next year's budget.

INNOVATE Details

Registration and JMT CAM Table
Tuesday, May 16: 6:00 pm – 7:30 pm
Wednesday, May 17: 7:00 am – 4:00 pm
Thursday, May 18: 7:30 am – 12:00 pm

CPE Credits:
Earn up to 12 CPE credits for attending INNOVATE 2017. In order to receive your credits, you must sign into each session with the room monitor and return the session survey. Your CPE certificate will be e-mailed to you within 10 business days after the conclusion of INNOVATE 2017.

Professional Services Team Appointments
Spend 30 minutes in our Computer Lab with a member of the JMT Professional Services team for one-on-one consulting and help with your questions about MIP or Intacct. Sign up for these sessions at the JMT CAM Team Table.

Hands-on Training
Sessions only hold 20 attendees on a first come, first served basis. You can sign up for any open spots at the JMT CAM table. You must bring your own laptop for the session.

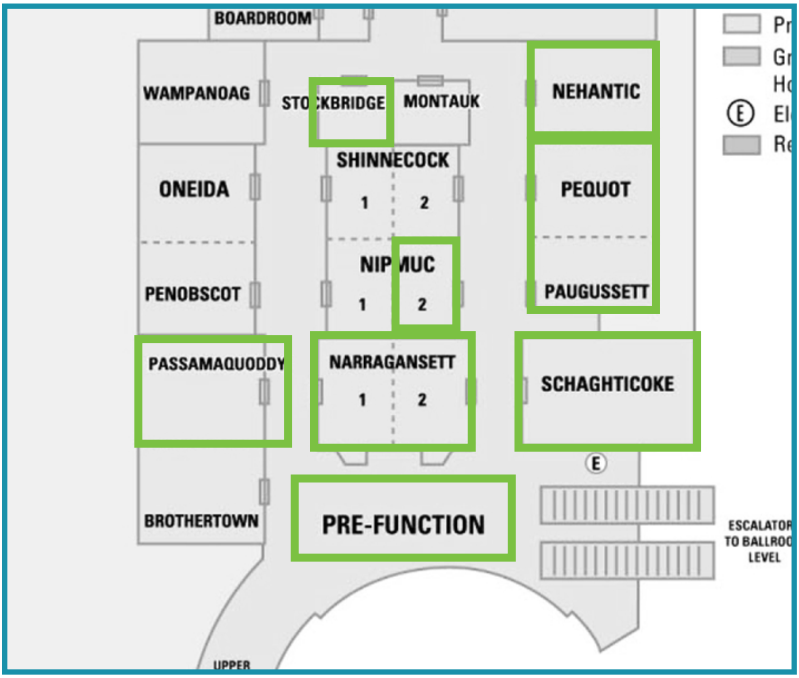
INNOVATE Receptions
Tuesday, May 16, 6:00 pm - INNOVATE Welcome Reception at Mohegan's Jimmy Buffet's Margaritaville.
Wednesday, May 17, 5:30 pm - INNOVATE Casino Night in Salon A1

Exhibit Hall
Located on the lobby level. Open during breaks and meals.

Birds of a Feather Lunches
Wednesday, May 17th, **12:10 pm** - Grab your food, find the sign for the "BOF" table that interests you (Intacct, Abila MIP, or Adaptive Insights) and have a seat. No need to RSVP or plan an agenda. JMT staff will be on hand to kick off these lively conversations.

Session and Conference Surveys
We want your feedback. Help us by filling out the INNOVATE session surveys and the INNOVATE overall conference survey. This is an important communication that we value. It helps us keep our conference content fresh and customized to what our clients want. Filling out the overall conference survey automatically enrolls you in our $100.00 Gift Card drawing. Sessions surveys can be turned into your room monitor. Overall Conference Surveys can be turned into either your room monitor or at the JMT Registration and CAM tables.

INNOVATE Floor Plan



Lobby Level

Pre-function - Exhibitors, Registration and JMT CAM Table

Nehantic - Intacct Mastery Track

Narragansett - Abila MIP Mastery Track

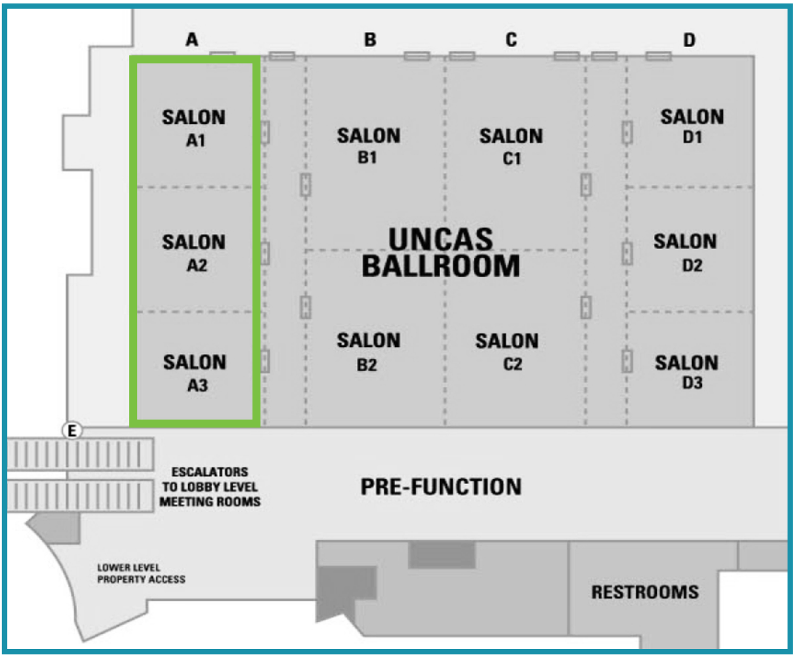
Nipmuc 2 - Professional Services /Computer Lab Appointments

Passamaquoddy - Innovate Track

Paugussett / Pequot - Abila MIP Fundamentals Track

Stockbridge - INNOVATE Video Room

INNOVATE Floor Plan



Ballroom Level

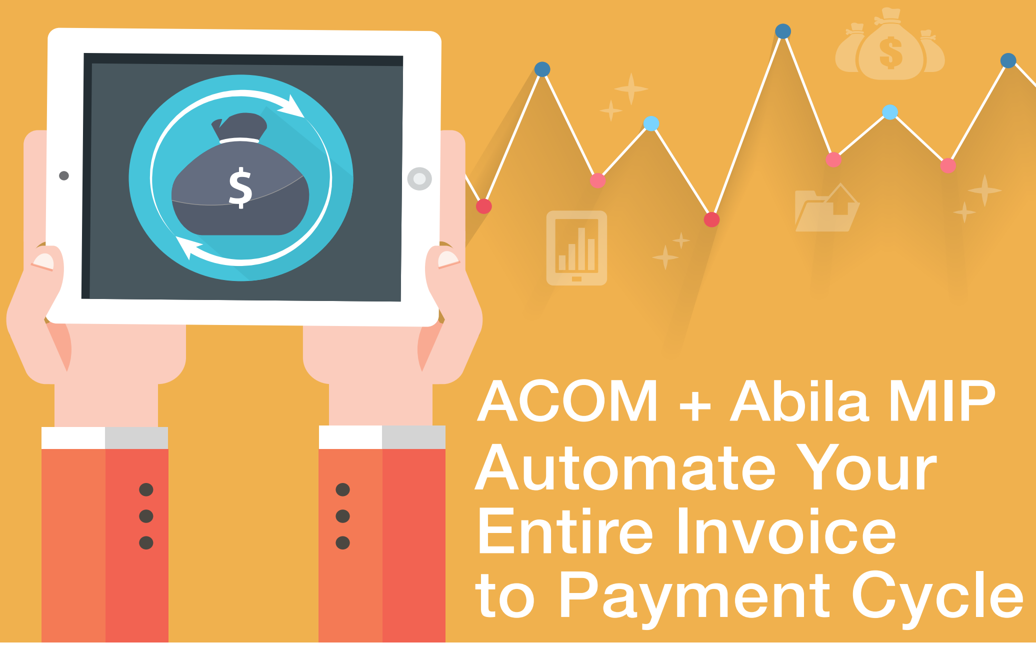
Salon A1-A3 - Meals and Wednesday night reception.

Show Your Love; Share Your Story!

Everybody has a story and we want you to share yours.

- **Stop by the CAM table**
- **Complete a short review of JMT on the G2 Software app**
- **Collect your $10 Starbucks card**

acomSOLUTIONS



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Schedule by Day

Tuesday May 16, 2017		
Time	**Event**	**Location**
6:00 PM	JMT Welcome Reception & Registration	Jimmy Buffet's Margaritaville
Wednesday May 17, 2017		
7:00 AM	Breakfast and Registration	Salon A1-A3
8:15 AM	Keynote	Salon A1-A3
9:00 AM	Session 1	See Agenda by Tracks
10:00 AM	Session 2	See Agenda by Tracks
10:50 AM	Break/Exhibitors	Lobby Prefunction Area
11:20 AM	Session 3	See Agenda by Tracks
12:10 PM	Lunch	Salon A1-A3
1:40 PM	Session 4	See Agenda by Tracks
2:40 PM	Session 5	See Agenda by Tracks
3:30 PM	Break / Exhibitors	Lobby Prefunction Area
4:00 PM	Session 6	See Agenda by Tracks
5:30 PM	JMT's Casino Night	Salon A1-A3
Thursday, May 18, 2017		
7:30 AM	Breakfast and Registration	Salon A1-A3
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4:00 PM	Session 6	See Agenda by Tracks

Agenda by Tracks

Wednesday, May 17

Tracks & Rooms / Sessions	Abila MIP Fundamentals *Pequot/ Paugussett*	Abila MIP Mastery *Narragansett*	Intacct Mastery *Nehantic*	Innovative Solutions *Passamaquoddy*	Financial Leadership *Schaghticoke*
One 9:00 AM	I Just Got Abila MIP... Now What? Part 1	STOP Fraud! Learn About Abila MIP's Security and Audit Trail	5 Cool, New Features of Intacct	Introduction to Intacct Cloud Financials	Financial Projections for Nonprofits
Two 10:00 AM	I Just Got Abila MIP... Now What? Part 2	True Story! How to Master Abila MIP Allocations	Mastering Ad-Hoc Reporting in Intacct	Transform Your Planning & Reporting With Adaptive Insights	The Effect of ASU 2016-14 on Nonprofit Finance Reporting
Three 11:20 AM	I Just Got Abila MIP... Now What? Part 3	Make Expense Reimbursing Fun Again With Nexonia	Workflows - the Path to the World of Tomorrow	Leveraging Workforce Go for Seamlessly Integrated Payroll & HR in Intacct	KPI's Every CFO Dashboard Should Have
Four 1:40 PM	OOH Shiny! Learn the New Features in Abila MIP 2017.1	When Going Slow Is Not An Option, Rev It Up With Abila MIP Performance Tuning	Budget Management Secret Sauce		Efficiency and Insight: Connecting Data to Tell a Story of Impact
Five 2:40 PM	Clean Up Month End Processes With these Best Practices	Take Charge of Your Requisition and PO Workflows With the Microix Workflow Module	Really? You Can Do That? Intacct Tips and Tricks	Creating Drama-Free Workplaces With Mission-Driven Leadership	Adaptive Insights Modern FP&A: Moving Fast and Staying Nimble
Six 4:00 PM	Back to Budgeting Basics	Maximizing Your Abila MIP System's Performance With Key Modules & Add-ons	Where Is It? Track Your Budget to Actuals Using Encumbrances / Commitments	Why Forward-Thinking Nonprofits Are Automating Expense Management	CFO Roundtable. Are You Ready for the Future?

Agenda by Tracks

Thursday, May 18

Tracks & Rooms / Sessions	Abila MIP Fundamentals *Pequot/Paugussett*	Abila MIP Mastery *Narragansett*	Intacct Mastery *Nehantic*	Innovative Solutions *Passamaquoddy*	Hands-On Training *Schaghticoke*
One 9:00 AM	True Story! You CAN Automate Revenue With Abila MIP A/R	Take Charge of Your Budget With the Microix Budget Workflow Management	The Word From the Street: Financial Report Writer Case Studies	Special Interest: Adaptive Insights - Tips & Tricks From Your Peers	[Abila MIP] Advanced Financial Reporting
Two 10:00 AM	Direct Versus Indirect. Easily Separate the Two With the Abila MIP Allocation Module	Advanced Financial Reporting in Abila MIP With Drillpoint	Building a Better Finance Report With Account Groups	Cloud Services for Abila MIP & Security Audits - 3 Things You Need to Know	[Intacct] Bob the Builder - Intacct Financial Statements (Part 1)
Three 11:20 AM	QuickStart for CFOs	Make it Your Report With User Defined Fields	Save Time; Get Smart Rules	i-Recruit™—Elevate Your Recruiting & Go Paperless With Cloud-based On-boarding	[Intacct] Bob the Builder - Intacct Financial Statements (Part 2)
Four 1:40 PM	Betcha Didn't Know This? Abila MIP Tips & Tricks	Dirty Data? Clean it Up With These Practical Tips	Grant Management-Automagically	ACOM—Automating The Entire Invoice-to-Payment Cycle: Extending the Function of Your Abila MIP Fund Accounting System	[Intacct] Configuring Impactful Dashboards
Five 2:40 PM	Ready for Your Next Audit? Tips From the Field	Got Abila MIP? Track Your Grants... For Free	Funder Blunder, Be Gone! Intacct Spend Control		[Abila MIP] Configuring Advanced Security & Audit Trail
Six 4:00 PM	Complete Your Modern Financial Solution With the Abila MIP Fixed Asset Module	Abila MIP Finance Study Findings and Vision For the Future of Abila MIP	How Dashboards Changed My Life		[Intacct] Working With Ad Hoc Reports

Session Descriptions

INNOVATE Keynote

Weaponized Data and the Role of Finance Professionals in the Fight for Social Justice

Wednesday, May 17, 8:15am - 8: 50am. Speaker- Vu Le, writer of Nonprofit AF, (formerly Nonprofit With Balls) and Executive Director of Seattle-based social justice organization, Rainier Valley Corps, will give an entertaining, thought-provoking and provocative talk filled with pictures of baby animals. Be prepared to think and laugh.

Data is a critical element in nonprofit work. Unfortunately, when it is used wrong, it becomes destructive, perpetuating the injustice we seek to fight. In this volatile political climate, finance professionals, who play key parts in our sector, must embrace their role in the fight for a just and inclusive society. To do that, we have to understand data, how it's interpreted, its role in history, and how it can be weaponized against our communities.

MIP Fundamental Track

I Just Got Abila MIP... Now What?

Wednesday, May 17, 9:00 am -12:10 pm; Session 1- 3, Speakers- Doug Gates and Steve Roese, JMT Consulting.

This session is designed for new Abila MIP users that will teach best practices and shortcuts that enable users to work faster and more efficiently. Topics include workstation customization, use of entry defaults, saving favorite reports in process manager, using recurring entries, distribution codes examples and the use of short-cut keys (F5 & F6).

OOH Shiny! Learn the New Features in MIP 2017.1

Wednesday, May 17, 1:40 pm - 2:30 pm; Session 4, Speaker- Dagi Stanton, JMT Consulting.

Come and learn about Abila MIP's new features and fixes in 2017.1. Nonprofit finance and accounting professionals need more visibility into both their finances and personnel. We will look at the expanded reporting capabilities across Abila MIP Fund Accounting™ that improve your ability to track and report on what's important to your team and stakeholders. You will learn about Abila's enhanced key Accounts Payable workflows, new administration options that support your audit trail, and the expanded human resource management features integrated within MIP.

Clean Up Month End Processes with These Best Practices

Wednesday, May 17, 2:40 pm - 3:30 pm; Session 5, Speaker- Dagi Stanton, JMT Consulting.

Even though Abila MIP does not require a month-end process, there are best practices for a clean and efficient month end that if followed, will also result in a clean and efficient year end. Walk away from this session with actionable tips to save your organization time.

Back to Budgeting Basics

Wednesday, May 17, 4:00 pm - 4:50 pm; Session 6, Speaker- Wes Dubay, Abila.
Improve your budgeting and analysis using the Abila MIP Fund Accounting Budget Module. In this session, we will show examples of how budget versions are used, methods for preparing forecasts, and how to incorporate those forecasts into financial reports. We will also discuss best practices for importing budgets developed outside the system.

True Story! You CAN Automate Revenue with MIP A/R

Thursday, May 18, 9:00 am - 9:50 am; Session 1, Speaker- Doug Gates, JMT Consulting.
In this class, you will learn how to automate your revenue and billings based on examples used from client cases. Tips on processing and reporting on Accounts Receivable will also be discussed. Several case studies will be presented showing best practices.

Direct Versus Indirect? Easily Separate the Two With the Abila MIP Allocation Module!

Thursday, May 18, 10:00 am -10:50 am; Session 2, Speaker- Steve Roese, JMT Consulting.
In this session, we will show you how the allocations module can help you easily organize and automate complex cost allocations using various methods. We will discuss common allocation scenarios such as overhead, fringe benefit and facilities costs. We will also use different allocation methods such as relative account balances, table percentages or user defined field units.

QuickStart for CFOs

Thursday, May 18, 11:20 am -12:10 pm; Session 3, Speaker- Dagi Stanton, JMT Consulting.
An introduction to navigating the powerful Abila MIP financial reports. We will walk through setting up the foundational structure of a financial report, how to customize it for your reporting needs, and how to replicate the structure for other financial reports.

Betcha Didn't Know This? Abila MIP Tips & Tricks

Thursday, May 18, 1:40 pm - 2:30 pm; Session 4, Speaker- Wes Dubay, Abila.
Did you know that there are some shortcuts built into Abila MIP that enable you to work more efficiently? Have you ever wondered if there is a way to identify required fields in Abila MIP? We will answer these questions and more to enable you to maximize your efficiency within Abila MIP.

Ready for Your Next Audit? Tips from the Field!

Thursday, May 18, 2:40 pm - 3:30 pm; Session 5, Speaker- Shazeeda Teekah, JMT Consulting.
Prepare for your next audit. We will review frequently requested reports and common questions, along with control features that can improve the accuracy of your Abila MIP Fund Accounting data. Get advice from real-world examples.

Complete Your Modern Financial Solution with the MIP Fixed Asset Module!

Thursday, May 18, 4:00 pm - 4:50 pm; Session 6, Speaker- Wes Dubay, Abila.
Are you tracking your Assets in a spreadsheet? Are you having to make manual depreciation calculations and then entering those as manual Journal Entries into

the GL? Let us show you what is involved in having the MIP Fixed Assets module track your assets and calculate your depreciation for you.

MIP Mastery Track

STOP Fraud! Learn About Abila MIP's Security and Audit Trail

Wednesday, May 17, 9:00 am - 9:50 am; Session 1, Speaker- Dennis Guiney, JMT Consulting.
In this session, we will review the security and audit trail features that will help you keep your nonprofit out of the headlines. By carefully securing access to sensitive data and auditing changes to your data, you'll not only sleep better at night but also avoid costly and avoidable issues.

True Story! How to Master Abila MIP Allocations

Wednesday, May 17, 10:00 am -10:50 am; Session 2, Speaker- Shazeeda Teekah, JMT Consulting.
Abila MIP Fund Accounting's Allocations Module (AM) lets you allocate costs on a variety of bases. Percentages to be allocated can be calculated by actual transactions posted in the system or predetermined percentages. Use the AM module to post Indirect costs allowed by your grants or contracts. AM is beneficial for any organization with multiple cost pools with differing allocation bases.

Make Expense Reimbursing Fun Again With Nexonia

Wednesday, May 17, 11:20 am -12:10 pm; Session 3, Speakers- Jason Carlin, Nexonia and John Tiso, JMT Consulting.
Do you have employees fill out paper requests to then have your Accounting department key in that information? Nexonia lets your employees eliminate paper use and enter their reimbursements directly into Nexonia, which can then be pulled into Abila MIP without duplicate entry. Don't wait until the end of the month to download credit card reports and distribute to the card holders to code. This session will teach you how you can download credit card transactions directly into Nexonia, ready for card holders to code.

When Going Slow Is Not an Option, Rev It Up With Abila MIP Performance Tuning

Wednesday, May 17, 1:40 pm - 2:30 pm; Session 4, Speaker- Dennis Guiney, JMT Consulting.
Clean data, current upgrades and routine system maintenance insures that your Abila MIP system performs efficiently. In this session we'll review best practices for keeping your Abila MIP system operating at peak efficiency. Walk away with actionable tips to rev up your system.

Take Charge of Your Requisition and PO Workflows With the Microix Workflow Module!

Wednesday, May 17, 2:40 pm - 3:30 pm; Session 5, Speaker- Steve Roese, JMT Consulting.
The Microix Requisition/PO Module helps control the creation, sending and monitoring of requisitions and accounts payable invoices by managing your processes from request through purchase order or accounts payable payments. You'll also learn how to submit an expense report with attachments through the AP

invoice workflow process. If your workflow and approval requirements are more complex than the standard Abila MIP modules can accommodate, you should attend this session to learn how Microix can deliver a solution.

Maximizing Your MIP System's Performance With Key Modules & Add-ons

Wednesday, May 17, 4:00 pm - 4:50 pm; Session 6, Speaker- Dagi Stanton, JMT Consulting.
In this high-level session, learn to streamline operations using powerful features in Abila MIP Fund Accounting™. Explore the array of modules to enhance productivity. Specific modules discussed will include Electronic Requisitions, Encumbrances, Purchase Orders, Accounts Payable, Electronic Funds Transfer, Budgets, Employee Web Services, Human Resource Management, and Payroll/ Payroll Link.

Take Charge of Your Budget With the Microix Budget Workflow Management

Thursday, May 18, 9:00 am - 9:50 am; Session 1, Speaker- Steve Roese, JMT Consulting.
The Microix Budget Module is an advanced planning and reporting tool that lets you automate the budget process by building budget and salary worksheets based on any MIP segments (program, department, etc.). It includes a multi-level approval process and worksheets that are automatically transferred to Abila MIP as unposted budget entries.

Advanced Financial Reporting in Abila MIP With Drillpoint

Thursday, May 18, 10:00 am - 10:50 am; Session 2, Speaker- Dagi Stanton, JMT Consulting.
Despite its flexible reporting capabilities, Abila MIP Fund Accounting cannot cover every reporting need for every client. Many users have turned to spreadsheets to meet their reporting needs, which are very time-consuming and repetitive. If you like the power of Microsoft Excel, you'll love DrillPoint Reports for Abila MIP Fund Accounting. This session will show you how Drillpoint and Abila MIP make the perfect pair.

Make It Your Report With User Defined Fields

Thursday, May 18, 11:20 am-12:10 pm; Session 3, Speaker- Shazeeda Teekah, JMT Consulting.
Use user-defined fields to track non-financial information in the chart of accounts or transactions. Some organizations track "FTE" or "Bed Count". Walk away with tips and tricks you can use to make reports your own.

Dirty Data? Clean It Up With These Practical Tips

Thursday, May 18, 1:40 pm - 2:30 pm; Session 4, Speaker- Dennis Guiney, JMT Consulting.
Duplicate data entry is both inefficient and error prone, but solving the problem through systems integration requires thoughtful planning. Focusing on specific examples, you will learn about key integration issues such as, what to import, how to create an audit trail, and setting up checks and balances when integrating third party systems with Abila MIP Fund Accounting™. You will also learn how to pinpoint synchronization issues with payroll, CRM, fundraising, and purchasing systems.

Got Abila MIP? Track Your Grants... For Free!

Thursday, May 18, 2:40 pm - 3:30 pm; Session 5, Speaker- Wes Dubay, Abila.
Track grants in MIP with a segment code. Use the Grants Administration module to track information about your grants. This is a free module. Use the Grant Period 'From' and 'To' date along with other fields. Enter the Indirect Cost Rate and pull this into the Allocations Module to post Indirect Costs automatically. This session will dive into how you can track your grants for free!

Abila's Finance Study Findings and Vision for the Future of Abila MIP

Thursday, May 18, 4:00 pm - 4:50 pm; Session 6, Speaker- Justin Morrow, Abila.
Results will be covered from Abila's Nonprofit Finance and Accounting study in which over 400 NPO professionals were surveyed. These respondent's shared their thoughts on the complexities of nonprofit finance across their organization, personnel, and business processes. We'll explore their thoughts on compliance, audits, coming FASB changes, and much more! Justin Morrow from Abila will then provide the vision for how Abila MIP will continue to serve the needs of nonprofit and government organizations through our customer centric philosophy and approach called "Product Discovery".

Intacct Mastery Track

5 Cool, New Features of Intacct

Wednesday, May 17, 9:00 am - 9:50 am; Session 1, Speaker- Linda Pinion, Intacct.
Things change quickly inside the cloud. Find out all about the newest and coolest features in Intacct and how to best keep up to date and ahead of the curve with future updates.

Mastering Ad-Hoc Reporting in Intacct

Wednesday, May 17, 10:00 am -10:50 am; Session 2, Speaker- Geoff Hearn, JMT Consulting.
Find out how to use the most powerful report writer in the Intacct system to organize and export virtually any data into a desired output. Walk away with tips you can use to master ad-hoc reporting.

Workflows - the Path to the World of Tomorrow!

Wednesday, May 17, 11:20 am -12:10 pm; Session 3, Speaker- Linda Pinion, Intacct.
Do you have the necessary oversight and controls for your increasingly complex business processes? If not, join us to find out how Intacct can give your organization a technological edge over your internal workflows!

Budget Management Secret Sauce

Wednesday, May 17, 1:40 pm - 2:30 pm; Session 4, Speaker- Joe Giorgio, JMT Consulting.
Being able to comply with FASB and funder guidelines for compliance reporting is a requirement for every nonprofit organization. To truly realize your organization's potential, you need the ability to plan, forecast and deliver meaningful insight to the leaders of your organization. In this session, we will discuss management

reporting strategies and tools every Intacct user can leverage to maximize the management reporting and potential insights for their organization.

Really? You Can Do That?! – Intacct Tips and Tricks

Wednesday, May 17, 2:40 pm - 3:30 pm; Session 5, Speaker- John Tiso, JMT Consulting.
One of the best tools in learning anything is learning from those before you. No need to reinvent the wheel, right? In this session, you'll learn some of the best tips and tricks Intacct has to offer to take your use of the system to the next level!

Where Is It? Track Your Budget to Actuals Using Encumbrances/Commitments

Wednesday, May 17, 4:00 pm - 4:50 pm; Session 6, Speaker- Joe Giorgio, JMT Consulting.
Being able to track not only your actuals but your Purchase Orders that have been placed is always a challenge for organizations. This session will show you how using Intacct Purchasing and Custom Books can accurately track your budget to your actuals.

The Word From The Street: Financial Report Writer Case Studies

Thursday, May 18, 9:00 am - 9:50 am; Session 1, Speaker- Joe Giorgio, JMT Consulting.
Learn how other nonprofit organizations use the Financial Report Writer to create reports. We will be focusing on multiple examples of reports ranging from audit reports to more creative reports that let you to analyze your financial activities in different ways.

Building a Better Finance Report With Account Groups

Thursday, May 18, 10:00 am - 10:50 am; Session 2, Speaker- Joe Giorgio, JMT Consulting.
Account groups are the building blocks of financial reports, graphs and performance cards. In this session, you will learn how to create accounts, group of accounts, and computation type account groups. You also will learn how to seamlessly create dimension structures from dimension groups as well as creating hierarchies of dimension structures.

Save Time; Get Smart Rules!

Thursday, May 18, 11:20 am - 12:00 pm; Session 3, Speaker- Geoff Hearn, JMT Consulting.
Make your Intacct system smarter and do more work for you! Smart rules and Smart events can be great tools to reduce workload and gain additional functionality from your Intacct system. Learn tips and tricks from our experts about how you can save time.

Grant Management – Automagically!

Thursday, May 18, 1:40 pm - 2:30 pm; Session 4, Speaker- Joe Giorgio, JMT Consulting.
Project Accounting in Intacct provides unique functionality that lets organizations track and report on grants or projects when accumulating costs for reimbursement or tracking time against specific grants or projects is desirable. Do you have to invoice your grantor to get reimbursed for your grant award? Do you need to capture employee time, employee expenses, and purchases against that grant? You may have already started using a grant dimension and that's a good start.

Take the next step by learning how to use automation to handle the complexities of grant management and accelerate growth in your nonprofit.

Funder Blunder, Be Gone! Intacct Spend Control

Thursday, May 18, 2:40 pm - 3:30 pm; Session 5, Speaker- Linda Pinion, Intacct.
With Intacct Spend Control, no longer are you required to manually check a separate report to confirm your purchase falls within Budget. Now, with Intacct's Spend Control, you can confirm everything in real- time. Join us to find out how!

How Dashboards Changed My Life

Thursday, May 18, 4:00 pm - 4:50 pm; Session 6, Speaker- Linda Pinion, Intacct.
Why run reports individually, instead of all together? See how Dashboards have revolutionized the way nonprofits have accessed and used real-time Business Intelligence to accelerate their decision making process to new heights!

Innovative Track

Introduction to Intacct Cloud Financials

Wednesday, May 17, 9:00 am - 9:50 am; Session 1, Speakers- Andy Harleman & John Tiso, JMT Consulting.
Intacct provides a robust set of financial management and reporting tools that give nonprofits unprecedented power and configurability to meet the unique requirements facing organizations today. Native to the Cloud, Intacct provides a multi-dimensional, table-driven chart of accounts that provides dimensions that can track transactions in all of the different ways organizations need for compliance and management reporting. In this session, you will learn how Intacct is helping thousands of nonprofit organizations optimize their finance function and improve organizational visibility.

Transform Your Planning & Reporting with Adaptive Insights

Wednesday, May 17, 10:00 am - 10:50 am; Session 2, Speakers- Andy Harleman & Brian Teets, JMT Consulting.
This session is designed for new Adaptive users. It will demonstrate an overview of Adaptive Insights as told from the perspective of a former Adaptive Insights end-user turned Adaptive Project Consultant. You will learn how Adaptive Insights can fundamentally change how you run your organization. Topics include: discovery dashboards, budget and long range planning, process tracking, personnel planning, and reporting.

Leveraging Workforce Go for Seamlessly Integrated Payroll & HR in Intacct

Wednesday, May 17, 11:20 am - 12:10 pm; Session 3, Speaker-Chris Goheen, Workforce Go.
Join this session and learn key trends in Human Capital Management including such topics as managing a multi-generational workforce, how to engage the workforce of today, and how Workforce Go! is helping organizations "Manage the Story of Their People". Workforce Go! provides solutions and services for Payroll, People and Time integrated with your ERP/Accounting packages.

Creating Drama-Free Workplaces with Mission-Driven Leadership

Wednesday, May 17, 2:40 pm - 3:30 pm; Session 5, Speaker- John and Jacki Davidoff, Davidoff Mission-Driven Business Strategy.

In this session, John and Jacki Davidoff, principals of Davidoff Mission-Driven Business Strategy, share the practices they have been bringing for over a decade to their nonprofit, association, foundation, and municipal clients including Centers for Disease Control, AARP Foundation, and Blessings In a Backpack to develop mission-driven, high-performance cultures that attract people, funders, and differentiate your nonprofit. Davidoff's unique approach is informed by the academic principles of transformational leadership and cutting-edge neuroscience. You'll learn easy-to-apply practices you will practice right in the workshop to lower drama and increase satisfaction. Learn how to shift your organization and yourself from mission-challenged to mission-driven in this fun, engaging and experiential workshop.

Why Forward-thinking Nonprofits are Automating Expense Managment

Wednesday, May 17, 4:00 pm - 4:50 am; Session 6, Speaker- Jason Carlin, Nexonia.

Whether it's a church, charity or youth organization, nonprofits exist to improve the quality of life of their constituents. In this session, we will discuss strategies to eliminate unique pain points such as reconciling multiple credit card transactions, workflow bottleneck and enhanced visibility into spending, shifting the focus back to what really matters for nonprofits - their mission.

Special Interest - Adaptive Insights; Tips & Tricks From Your Peers

Thursday, May 18, 9:00 am - 9:50 am; Session 1, Speaker- Brian Teets, JMT Consulting.

In this session you'll learn the enhancements from Adaptive's last major annual update. This session will take a peek at some of these new tips and tricks Adaptive has to offer to take your use of the system to the next level. Topics include: excel interface for planning, new reporting features, new administration features and more.

Cloud Services for Abila & Security Audits - 3 Things You Need to Know

Thursday, May 18, 10:00 am - 10:50 am; Session 2, Speaker- Jacki Tiso, JMT Consulting.

The cloud. You've heard all the hype. But is it right for your business? Join Jacki Tiso, CEO and Founder of JMT Consulting, as she discusses how NPT provides a choice for your Abila MIP Accounting Software. She'll take you through what moving to the cloud means in the context of Abila MIP and provide cost/benefit information to determine if moving to the cloud is the right choice for your business. Starting with the basics, Jacki will walk you through what cloud computing means, benefits of moving to the cloud, and costs associated with the move. At the end of the session, you'll be able to determine if moving to the cloud is the right choice for you.

i-Recruit - Elevate Your Recruiting & Go Paperless with Cloud-based On-boarding

Thursday, May 18, 11:20 am - 12:10 pm; Session 3, Speaker- Brian Kelly, iRecruit.

Improve recruiting, applicant tracking and electronic on-boarding with iRecruit.

iRecruit adds value to your HR Department, increasing your efficiency, engaging hiring managers, reducing time to hire, and providing a paperless electronic on-boarding workflow.

ACOM - Automating the Entire Invoice-to-Payment Cycle: Extending The Function of Your Abila MIP Fund Accounting System

Thursday, May 18, 1:40 pm - 2:30 pm; Session 4, Speaker- Gerry Libby, ACOM.
Your Abila MIP Fund Accounting System is a powerful business tool, but do you use it to its fullest potential? Join us as we explore true paperless AP and payment automation, from capturing and processing invoices, to easily moving suppliers to the efficiency of electronic payments. Learn how invoice-to-payment automation can eliminate manual paper-intensive processing, increase staff productivity and have a serious savings impact on your bottom-line.

Financial Leadership Track

Financial Projections for Nonprofits (interactive session)

Wednesday, May 17, 9:00 am - 9:50 am; Session 1, Speaker- Tom McLaughlin, President, and CEO of McLaughlin & Associates.
Do spreadsheets give you the chills? Do accountants seem to speak in an obscure language of numbers? This session will improve the odds against you. At far too young an age, Tom McLaughlin became the CEO of a nonprofit organization, and immediately realized that he knew very little about financial matters. His journey through nonprofit finance led him to write "Streetsmart Financial Basics for Nonprofit Managers (4th ed.)". He will show you how to derive knowledge and insights using common financial records. You'll find out how to use a simple calculation to know how long your cash will last. You'll learn how to assess the loans that your predecessor took on. You'll find out how to learn the 'age' of your equipment and how to know if your bills are being paid quickly enough. Bring a calculator if you wish.

The Effect of ASU 2016-14 on Nonprofit Finance

Wednesday, May 17, 10:00 am -10:50 am; Session 2, Speaker- John Alfonso, CPA, CGMA, Cohn Reznick.
Recently, the Financial Accounting Standards Board (FASB) issued a new nonprofit financial reporting standard, the Accounting Standards Update (ASU) No. 2016-14, affecting all nonprofit entities as well as donors, grantors, creditors, and others that use their financial statements. The standard is intended to simplify and improve how nonprofit organizations report net asset classes, expenses, and liquidity in their financial statements.
Join us for an informative session where we will review:

- Effective date and transition guidance
- Qualitative and quantitative requirements
- Impact to stakeholders
- What organizations can do to prepare for the changes

KPI's Every CFO Dashboard Should Have

Wednesday, May 17, 11:20 am –12:10 pm; Session 3, Speaker- Jacqueline Tiso, CEO, JMT Consulting.

Coming up with the right Key Performance Indicators (KPIs) for your nonprofit is a little bit science and a little bit magic. You want to identify and track metrics that are aligned with your organization's mission and strategic plan. It's the only way that you can ensure that your program and/or services meet your goals.
Join Jacki Tiso, CEO of JMT Consulting, to learn the secrets of choosing the right KPIs for your organization. KPIs that your board wants you to track will help your organization:

- Remain financially viable
- Benefit the community or members you are serving
- Learn how to set goals necessary for achieving your overall mission

Walk away from the session with a fresh perspective on not only which KPIs to track, but also how you can track them, and the best way to present them to your board.

Efficiency and Insight: Connecting Data to Tell a Story of Impact

Wednesday, May 17, 1:40 pm - 2:30 pm; Session 4, Speaker- Jeremy Aranda, President of Mission Matters Group.

People give to a nonprofit because they believe in a vision and want to be part of something bigger than themselves. They want to know that their contribution is making a difference. The challenge of nonprofits is to connect people to their mission and effectively communicate the impact they are having on the people they serve. In this session, we will explore the power of connected data (financial, program, client, volunteer and donor) and how it is being used to reduce administrative burden, increase data quality, and maximize the ability for a non-profit to track, measure and effectively tell their story of impact.

Adaptive Insights: Modern FP&A; Moving Fast and Staying Nimble

Wednesday, May 17, 2:40 pm - 3:30 pm; Session 5, Speaker- Thomas Peff, Adaptive Insights

This session will highlight best practices for effective budgeting, forecasting and reporting. The speaker will share some of the internal models and processes his team has implemented to help their company better manage their business, including improved top-line forecasting, headcount & expense planning as well as automated data integration and KPI/board reporting.

CFO Roundtable. Are you ready for the future?

Wednesday, May 17, 4:00 pm - 4:50 pm; Session 6, Speaker- Jacqueline Tiso, CEO, JMT Consulting.

Imagine that you are in the year 2025. What does your financial team look like? What does your financial solution look like? Are you still muddled in dated servers and software or have you moved to the cloud? Does it still take you two weeks (or more) to close? Join Jacki Tiso, CEO of JMT Consulting, along with experts from JMT Consulting and Intacct, for an informative round table discussion on the future of accounting. Lend your voice as we discuss trends in nonprofit accounting and how you can prepare today to embrace the future.

Hands-On Training

This will be our first INNOVATE with hands-on training labs. We are dedicating one full day with training sessions for both MIP and Intacct, geared to help you become more proficient with the products you already use. **Please note: you will need to bring your own laptop. Each session is limited to 20 attendees.**

Abila MIP - Advanced Financial Reporting

Thursday, May 18, 9:00 am - 9:50 am; Session 1, Instructor- Shazeeda Teekah, JMT Consulting.
Learn how to create complex FASB-style financial statements using segment substitution, report groups and combining columns. Also learn how to create and use customized user-defined fields for advanced data reporting.

Intacct - Bob The Builder, Intacct Financial Statements (2-part session)

Thursday, May 18, 10:00 am - 12:10 pm; Sessions 2 and 3, Instructor- John Tiso, JMT Consulting.
A financial management system is only as good as it's ability to get the right information to the right people. That's exactly why Intacct is loved by so many! Learn how to create financial reports in Intacct from scratch, along with best practices and tips throughout the process!

Intacct - Configuring Impactful Dashboards

Thursday, May 18, 1:40 pm - 2:30 pm; Session 4, Instructor- Geoff Hearn, JMT Consulting.
Putting the right information, at the right level of detail, presented in an impactful way, in front of the right people is one of the most profound ways that finance teams impact the effectiveness of their organizations. Intacct Dashboards allow you to visualize financial and operational results to convey not just information, but meaning. In this session, we'll walk through the steps of creating impactful Intacct dashboards that can empower good decisions by stakeholders throughout your organization.

Abila MIP - Configuring Advanced Security & Audit Trail

Thursday, May 18, 2:40 pm - 3:30 pm; Session 5, Instructor- Dennis Guiney, JMT Consulting.
In this hands on session, we'll walk through examples of configuring user and group security, account-level access, executive-view user access, as well as audit trail features. We'll also walk through creating reports to retrieve audit trail information from your Abila MIP system.

Intacct - Working with Ad Hoc Reports

Thursday, May 18, 4:00 pm - 4:50 pm; Session 6, Instructor- Geoff Hearn, JMT Consulting.
In this session we will be rolling up our sleeves and getting hands-on with the Custom Report Writer.

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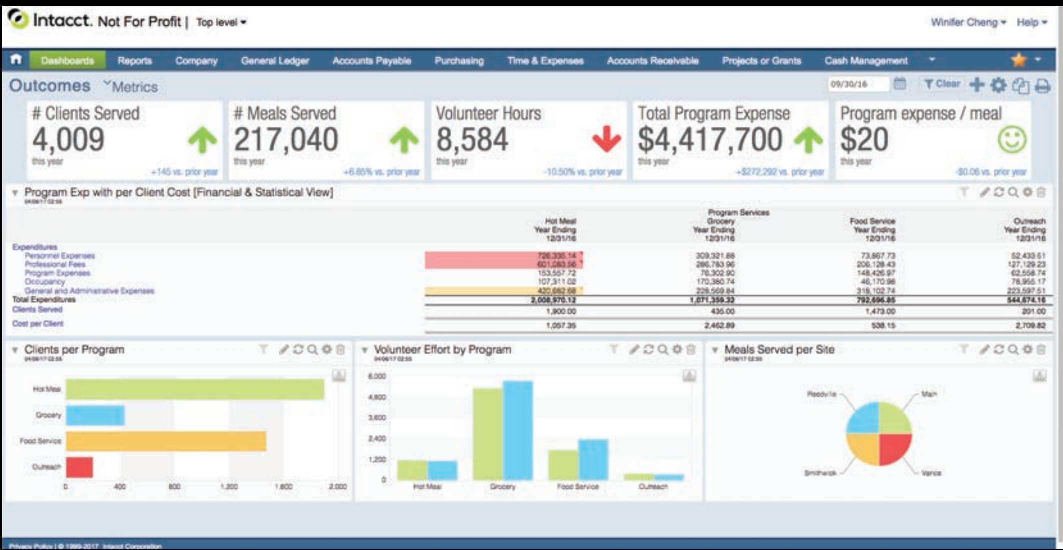

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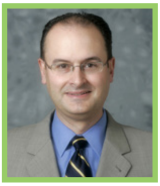
Speakers & Presenters

John Alfonso – CPA, Partner, CohnReznick



John is a partner in CohnReznick's New York office and, as one of the firm's top resources in the not-for-profit industry, leads the efforts of the firm's Not-for-Profit and Education Industry Practice in New York. He has over 30 years of experience providing audit, accounting, tax, and consulting services to not-for-profit organizations, including membership based organizations, educational institutions, foundations, religious organizations, developers of low-income housing, and health and welfare organizations.

Jeremy Aranda, Vice President of Business Solutions at Mission Matters Group

Jeremy received his Bachelors from St. Louis University and a Masters from the University of Notre Dame. His passion drives him to find creative ways of helping nonprofits gain efficiency and insight so that they tell the story of their impact, backed by empirical data, in a way that's demonstrable and concrete.

Jason Carlin, Manager of Product Education, Nexonia

Jason is Nexonia's Product Education Manager and a veteran of the company (and of expense reporting). Jason leads Nexonia's talented group of Product Education Specialists, a customer-facing department of educators who demonstrate Nexonia's products to prospective customers, and provides training for Nexonia's users.

John & Jacki Davidoff, Founders and Chief Mission Drivers, Davidoff Mission-Driven Business Strategy

Davidoff Mission-Driven Business Strategy is a national strategy, thought leadership and marketing communications consultancy. Founded in 2005, Davidoff leads foundations, nonprofits, associations and businesses with its proprietary Mission-Driven™ branded methodology to increase mission impact, drive revenue, and build meaningful relationships with members, donors, partners, sponsors and other stakeholders.

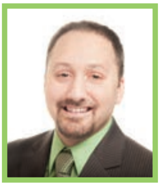
Wes Dubay, Sales Engineer, Abila

Wes is a native Texan and graduated from Texas Tech University. Shortly after graduating he began working for Sage Software in 2005 as a support analyst. He remained a part of the support department for 6 years as a senior support analyst. He then moved to quality engineering and became lead test engineer for the Fund Accounting software. Starting in 2013 Wes again changed departments and became a Sales Engineer for the Sales department. Wes assists with onsite product demonstrations, product questions, conferences, webinars, and RFP's as part of his current role.

Doug Gates, Senior Project Consultant, JMT Consulting

Doug is an accounting professional with twenty-two years experience in the accounting field. During those years, he has spent time in diverse industries from large, for-profit, publicly held companies to small, independent, nonprofit organizations. Much of his experience was spent in a variety of nonprofit organizations, which is where his real passion lies. Doug's nonprofit experiences have included: CFO for a small Human Service Organization, VP of Finance for Goodwill Industries in Pennsylvania, Budget Manager for a Large 550 Bed Teaching Hospital, and CFO for an extremely large International Christian Ministry. In 2005, he found JMT Consulting via their Innovate Conference and became a client of JMT while working at Goodwill Industries.

Joe Giorgio, Project Consultant, JMT Consulting



Joe understands the struggles and rewards of a nonprofit first hand. After receiving his bachelor's degree in Accounting from Siena College and a master's in Accounting from Strayer University, Joe went on to spend 7 years working for a Social Services NFP. While there, he went from the trenches of the finance department starting out as a Bookkeeper and working his way up to Accounting Manager. As the overseer of several of the organization's financial tasks such as AR and AP processing, he became well versed in the area of financial reporting. Joe joined JMT Consulting Group in 2013 as a Project Consultant and now implements new software such as Intacct, Abila MIP and Microix for other nonprofit clients. As one of the top consultants for JMT, Joe travels the country and runs software user groups, regional trainings and customizes on-site and remote trainings for clients. One of his favorite parts of the job is being able to help nonprofits solve real, everyday problems. He feels the more nonprofits he can help, the more nonprofits will be able to help others.

Chris Goheen, President, Workforce Go!

Chris has a passionate belief that people are the most important factor in the consistent success of any organization's business results. He brings client's knowledge garnered over his 16 years of experience in solution implementation, training, consulting, people management, and sales with a tenured expertise in employer solutions including talent acquisition and management, paperless employee engagement, time & labor management, risk mitigation and compliance, employee, benefits, and payroll administration, and decision support. Chris is a proactive team member, and willing to listen as much as coach others.

Dennis Guiney, Technical Specialst, JMT Consulting Group

Dennis Guiney is a Technical Specialist and valued member of the team at JMT Consulting Group. Dennis is charged with installing, upgrading and supporting JMT's product line and also works with clients for integration of all third party products, custom programming and network configuration. Prior to joining JMT, Dennis worked as the technical specialist at S. Hellman Company, Inc., a consultancy serving the nonprofit community. S. Hellman Company merged with JMT in January of 2006. Dennis holds a BS in Computer Programming, and certifications for the application areas that JMT supports. In his own words, his favorite thing about working at JMT is the client interactions during support calls. He gets an opportunity to get to know them as people, and in assisting them in doing their jobs, contributes to the wonderful missions of each and every one of them.

Andy Harleman, Director of Sales, JMT Consulting

In the mid-90's, Andy helped found a nonprofit organization serving people with developmental disabilities in the St. Louis, MO area. There, he served as Administrative Director until departing to pursue his ambition to start a small business. Andy gained invaluable business experience and insight during the years he operated his own business before moving into a new endeavor. For the next 5 years, he worked for the National Federation of Independent Business (NFIB), a small business advocacy organization, in the role of new membership sales. In 2006, Andy found an opportunity to join the team of NFP Consultants, a value-added reseller of software dedicated to the nonprofit sector. This position drew on three of Andy's passions: nonprofit, small business, and consultative sales. In 2008, NFP Consultants was acquired by JMT Consulting Group, where Andy has pursued his passion helping clients succeed.

Geoff Hearn, Project Consultant, JMT Consulting

Geoff Hearn is a project consultant at JMT Consulting Group. Geoff is a certified IAP consultant in Intacct Cloud Accounting and, has also completed the Advanced Implementation and Configuration certification class. Geoff started at JMT in 2011 as an Associate where he learned all about JMT and their mission. The time spent as an Associate along with the Accounting classes he has taken has helped mold Geoff into the role he holds today as a Project Consultant. As a newcomer to the nonprofit accounting world, Geoff is eager to continue learning to provide the best possible support to JMT's clients.

Brian Kelly, Managing Partner, CMS iRecruit

Brian Kelly has over 30 years developing and implementing Human Resource Systems. He founded Cost Management Services, LLC in 1997 to focus on developing and providing Employment Management Solutions for business across North America. In 2003. CMS developed iRecruit in 2003 and added integrated electronic on-boarding with iConnect. iRecruit completely integrates with leading Human Resources Management systems. CMS is pleased to have been recognized as one of the the 20 Most Promising Sage Solution Providers by CIO Review Magazine and is a member of the American Payroll Association.

Vu Le, Executive Director of Rainier Valley Corps, speaker, and writer of the blog "Nonprofit AF".

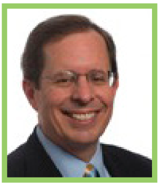
Vu Le ("voo lay") is a writer, speaker, vegan, Pisces, and the Executive Director of Rainier Valley Corps, a nonprofit in Seattle with the mission of developing and supporting leaders of color to strengthen the capacity of communities-of-color-led nonprofits and foster collaboration between diverse communities to effect systemic change.

Vu's passion to make the world better, combined with a low score on the Law School Admission Test, drove him into the field of nonprofit work, where he learned that we should take the work seriously, but not ourselves. There's tons of humor in the nonprofit world, and someone needs to document it. He is going to do that, with the hope that one day, a TV producer will see how cool and interesting our field is and make a show about nonprofit work, featuring attractive actors attending strategic planning meetings and filing 990 tax forms. Known for his no-BS approach, irreverent sense of humor, and love of unicorns, Vu has been featured in dozens, if not hundreds, of his own blog posts at nonprofitaf.com.

Gerry Libby, Client Solutions Advisor, ACOM Solutions

Gerry Libby has an extensive background of over 20 years in the ERP market as a consultant and implementation specialist. His areas of focus have been in financial and project accounting in non-profit and commercial sectors, distribution and manufacturing. Gerry is a Client Solutions Advisor for ACOM Solutions for Abila MIP and supported ERP systems.

Thomas A. McLaughlin, President and CEO, McLaughlin & Associates



Tom formed McLaughlin & Associates after nearly two decades as a nonprofit consulting specialist with two national accounting and consulting firms. Tom has over 37 years of nonprofit experience as a nonprofit manager, trade association executive, and management consultant.
Tom is a contributing editor for the Nonprofit Times, for which he writes a monthly column. Tom also serves on the Board of Directors of the Massachusetts Council of Human Service Providers and has served on the board of directors of the Make-a-Wish Foundation of Greater Boston and Family Service, Inc. Tom is nationally recognized as an expert in nonprofit mergers and alliances, having consulted to nonprofits in over 250 such collaborations. He is also nationally recognized as an expert in nonprofit strategic positioning, financial management, and organizational restructuring.

Justin Morrow – Product Marketing Manager, Abila

Justin began his journey in the nonprofit sector more than a decade ago as a technology consultant. He traveled across the United States working with hundreds of nonprofits including community foundations, universities, hospitals, and animal welfare organizations. He specialized in helping nonprofits implement integrated financial, online fundraising, and donor management solutions. His focus on customer centered development led Justin on a path to product management and product marketing. He has spent the past five years discovering and delivering innovative solutions that delight customers. He's passionate about helping nonprofits, governments, and associations maximize their use of technology so they can advance their missions. He currently lives in Austin, TX and is the product marketing manager for MIP at Abila.

Thomas Peff, Director of Finance, Adaptive Insights

Thomas has implemented business change and driven growth at both early and late stage companies in a variety of financial, operational and principal investment roles. He currently serves as Director of Finance at Adaptive Insights, a high-growth enterprise software company. Prior to Adaptive Insights, he held roles as an investment professional at TDR Capital, a London-based PE firm, a CFO at a technology startup and an investment banker at Deutsche Bank. Tom graduated from Princeton University with an AB in Economics/Finance.

Linda Pinion, Principal Sales Engineer supporting Account Executives and Channel Partners, Intacct

Linda has 25+ years Solution Selling with Tier 1 Software organizations as well as vertical expertise within Hospitality, Healthcare, Nonprofit, Manufacturing and Distribution. The Co-Founder of UDA Star Foundation.

Steve Roese, Project Consultant, JMT Consulting

Steven M. Roese, CMA is a project consultant at JMT Consulting Group. Steve has used several of the Abila MIP and Microix software modules for the past eight years. Steve supports clients to plan the solution implementation, design reports, provide training to users, communicate on project status and manage the overall project.

Prior to joining JMT, Steve was the Director of Accounting for Planned Parenthood of the Heartland (PPH) in Des Moines, Iowa. While at PPH, Steve implemented several of the Abila modules during a time when the organization had four mergers. Steve was responsible for all aspects of the financial & tax reporting for 5 organizations with a total annual budget exceeding 30 million dollars.

Prior to his employment with PPH, Steve was the Comptroller for the Iowa Foundation for Medical Care (IFMC) located in West Des Moines, Iowa. During his 25 year tenure with IFMC, Steve implemented several accounting software packages and saw the company grow from 3 million in annual revenues to over 100 million annually. Steve received his accounting and business administration degree from the American Institute of Business in Des Moines, Iowa.

Dagi Stanton, Project Consultant, JMT Consulting

Dagi joined JMT Consulting as a Project Consultant in September of 2014. With over 20 years in the nonprofit industry and her extensive experience working with and implementing donor and Abila MIP software, she was an ideal fit for the JMT family and Professional Services Team. Dagi is one of JMT's leading experts of Abila MIP and its core modules, as well as payroll, HR and EWS. Prior to joining JMT, she was an Implementation Specialist for Orange Leap and served as the Director of Services and Facilities for CAM International (now Camino Global). A native of Germany, Dagi moved to Texas at age 10 and grew up with English as her second language. She graduated with a Bachelor of Science in Business and Accounting from John Brown University and received her MBA from Amberton University (formerly Abilene Christian College).

Shazeeda Teekah, CPA, Project Consultant, JMT Consulting

Shazeeda is a project consultant with JMT Consulting Group. She is a certified consultant in Abila MIP Fund Accounting, Kintera Fundware and Microsoft NAV. Shazeeda has been designing and implementing strategic accounting solutions since 1992. She supports clients in improving accounting methodologies and reporting procedures, maintaining a healthy cash flow, and analyzing business performance to meet mission objectives. Shazeeda was previously a partner at S. Hellman Company, Inc., a consultancy serving the nonprofit community that merged with JMT in 2006. There she performed system design, directed support projects, and managed staff in conducting implementation and training. Before joining S. Hellman Company she was with Mitchell Titus & Co., where she performed financial audits of nonprofit, commercial and governmental organizations. Shazeeda holds a B.S. degree in accounting from Queens College in New York City.

Brian Teets, MBA, Project Consultant, JMT Consulting

Brian joined JMT in March, 2017 and brings significant accounting and finance experience in particularly within higher education and non-profits. Brian also has experience in the ERP implementation processes, including project planning, business process reengineering, and user acceptance testing. He has also proven experience implementing Adaptive Insights, for which he receive a Torchy Award on behalf of Montclair State University. Brian has experience in all aspects of corporate accounting from the monthly close to the annual audit. He has a proven capability to work well with all organization levels and to successfully execute on projects.

Tom Thornton, COO, JMT Consulting

Tom brings over 20 years of experience with software solutions for nonprofit and public sector organizations as part of Micro Information Products, Sage and nFocus Software. Tom's extensive industry and operational experience allows him to guide the overall execution of all aspects of JMT's business including marketing, sales, delivery and support.

In addition to his experience in professional services, sales and business development with software solutions, Tom was Director of Product Management for Sage Software, where he was responsible for new product development for all of their nonprofit accounting and fundraising solutions. Under Thornton's leadership, Sage MIP Fund Accounting received three consecutive Campbell Awards recognizing MIP's extremely high user satisfaction.

Jacqueline Tiso, CEO, JMT Consulting

Jacqueline is a frequent speaker on financial management and cloud (SaaS) technology and is regularly called upon for her expertise by the media and as a conference speaker. Several years ago, JMT migrated most of its internal systems to the Cloud, and after experiencing the benefits of these systems, Jacki has been a leading proponent of cloud systems for non-profits ever since. Jacqueline has received national recognition with the Technology Pacesetter award in Accounting Today, a Var 100 member, as well as being featured on the cover of Accounting Technology. JMT continues to be the leading partner for back-office systems, annually receiving awards including Abila Presidents Circle, Intacct President's Club, and Sage's President's Circle and Chairman's Club. Jacqueline has over twenty five years' experience in the nonprofit sector. Prior to founding JMT Consulting Group, she was CFO and Comptroller for a number of nonprofit organizations. She has assisted nonprofit organizations with all financial aspects of their business from accounting services and technology to high level management and board consulting. Jacqueline continues to serve on a number of nonprofit boards and committees in support of their efforts to make a difference in the world.

John Tiso, Solutions Engineer, JMT Consulting

John joined JMT in 2008 and part of his initial role was to help overhaul JMT's internal finance processes. His love for technology and implementing processes resulted in the perfect culmination for an introduction of Intacct as part of JMT's portfolio. Since that time, he has worked closely with Jacki to lay the foundation for JMT's new Intacct practice. In 2010, John became JMT's first Intacct certified consultant. As a certified consultant of Intacct for JMT, John has led and implemented a number of trainings, client support sessions and webinars. He continues to be one of JMT's leading experts in everything relating to Intacct and, in recent years, has become a valuable asset in our Sales department. John also leads JMT's sales webinars for Nexonia, and has worked with other products such as Salesforce, Abila MIP, Brittenford PositivePay, and CLA Allocations Management.

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Zachary Griggs, Director of Finance - zgriggs@jmtconsulting.com

Stay in touch

Remember, JMT Consulting Group is here to help you now and in the future, with support, training, consulting and software solutions.

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Hi, my name is Dana.

I'm glad to help because I care about your work. When you call, I will know your name.

Dana Winsauer
Client Services Rep
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