



# NONPROFIT FINANCIAL MANAGEMENT:

## CREATING & MAINTAINING CONFIDENCE THROUGH TRAINING & CONSULTING



Eric Plato is an excellent trainer, speaker, and facilitator in nonprofit and co-operative financial management. He has worked for over ten years with the Schulich School of Business teaching students in both the MBA program and a wide variety of Executive programs. He offers expert professional training at all levels, and also brings insights and leads discussion about current issues and thorny problems in this sector. Our students speak very highly of his ability to take difficult subjects and make them accessible and immediately operational. **BRENDA GAINER, ROYAL BANK**

**PROFESSOR OF NONPROFIT MANAGEMENT, SCHULICH SCHOOL OF BUSINESS, YORK UNIVERSITY, TORONTO**

Eric Plato is a wonderful speaker and is always in demand at the City of Mississauga! Eric has provided a number of Financial Workshops for the City's Community Groups. Our groups were so pleased with Eric's style and presentation. He has a unique ability to take complex financial concepts and break them down into meaningful and useful information for community organizations. Eric has a wonderful way of taking the "scariness" out of finance and budgeting to help volunteer Board Members and Directors feel confident and comfortable with their financial responsibilities and due diligence. Only Eric can teach how to read a budget and an audited report in a way that everyone can understand and participate. Eric is an expert in the Not for Profit sector and creates a workshop where everyone can ask questions. We are so grateful to have had Eric present to our groups! **HEATHER COUPEY, CITY OF MISSISSAUGA, COMMUNITY & NEIGHBOURHOOD DEVELOPMENT**

In the not-for-profit world, individuals are required to wear many hats and the least comfortable one for many passionate advocates is the financial management hat. Eric Plato's budget workshops build confidence in budget making, financial statement and cash flow literacy. Eric understands the needs of a social enterprise and increases financial competency with accessible session content. Anyone entrusted with managing a budget should book Eric. **KRISTA STEEVES, PROGRAM COORDINATOR, YMCA OF FREDERICTON**

Eric is a skilled and knowledgeable accountant. Not only was he able to help me incorporate simple best practices for developing budget and reporting standards, but he helped me create monthly financial reports that clearly tracked the organization's financial performance once the budget was in place. His strengths lie in his extensive accounting knowledge, his wealth of experience, and his unique ability to simplify tasks that could become overly complicated. I highly recommend working with him. **CAMARA CHAMBERS, EXECUTIVE DIRECTOR, VOLUNTEER TORONTO**

## WHO IS ERIC?

Eric Plato is a CPA, CMA who has held many finance roles in the nonprofit sector since 1990. Between board and work experience he has worked with organizations with budgets ranging from under \$100,000 to over \$100 million. Eric is dedicated to supporting nonprofit and charity leadership (your staff and/or Board) in learning and gaining confidence in matters of nonprofit financial management. More references at [www.nonprofithelp.ca](http://www.nonprofithelp.ca)



**LET'S FIND A DATE**  
EMAIL [david@nonprofithelp.ca](mailto:david@nonprofithelp.ca)

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# THE TOPIC OPTIONS



## Financial Management for Boards

- What are your fiduciary responsibilities
- Budget approval and questions you should ask
- How to read financial reports
- Indicators of financial health

## Financial Management for ED's and Finance Staff

- Best practices in budgeting
- Preparing budgets for grant proposals
- Budgeting for administrative costs
- How to analyze financial reports
- How to read audited financial statements
- How to identify signs of financial stress
- How to manage the complexity of multiple project funding
- How to present financial information to your staff and board
- Design of financial systems
- Review and design of internal controls
- Preparation for an audit



**FEE:** Includes prep work by phone to customize the session to your needs and PDF full resource pack for each Board member. Please find our current fees at this web page: [nonprofithelp.ca/training](https://nonprofithelp.ca/training)