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Foundation Accounting and Fundraising Integrated for Success.

Richmond Jewish Foundation highlighted in NEW Case Study: Automation and customization improve overall foundation effectiveness.

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–AccuFund, Inc., provider of top-rated nonprofit accounting and fundraising solutions, partners with Richmond Jewish Foundation in new Case Study; showcasing streamlined accounting and fundraising functions improve all aspects of the foundation.

Richmond Jewish Foundation (RJF) is a primary, trusted and expert resource for planned giving and endowments, providing services to the community and its donors, making grants and undertaking community leadership and partnership activities to address a wide variety of needs in its service area.

With AccuFund, RJF was able to customize their accounting statements – for each one of their funds– and show their part of the income from the whole investment. Through various tools within AccuFund Accounting Suite, combined investment revenues are allocated to various funds so RJF always knows how much each of the 250 funds has at any given time – and that it is properly accounted for; how much is invested in long term, short term, and liquidity. Using the Allocations Management module, the system calculates and posts administrative fees automatically, totally eliminating the need for spreadsheets.

Read the Richmond Jewish Foundation Case Study at www.accufund.com/pdf15/CS-RJF15.pdf

“AccuFund improved our overall internal control process,” explains Michele Craig, RJF’s CFO “we’ve improved our workflow and added checks and balances where we didn’t have them before.” Additionally, Craig offers, “The integration between AccuFund Accounting Suite and Salesforce (AccuFund CRM’s customization of Salesforce) allows our CEO to access information whenever he wants/needs it. He can be working in Salesforce and look up fund balances or see donations made to or grants made from each fund. Previously this was only seen in the accounting system.”

AccuFund CRM set out to provide a completely customized Salesforce solution for both RJF staff and their constituents by designing an online portal that allow constituents to review and submit online donations and applications without any involvement from the staff.

The online portal allows donor-advised fund users to:

- View fund balance, donations to the fund, and grants distributed from the fund
- Give donors the ability to make recommendations for grants from their fund to nonprofit organizations.
- Integrate online donation page for RJF that is accessed on their website and imports data directly into

Salesforce

- Allow donors to donate easily and confidentially

“Custom functionality has made our lives easier. With a lean staff and a modest budget, AccuFund has been a wonderful partner to understand our needs, provide solutions and help us streamline our business,” explains Robert Nomberg, RJF’s President & CEO.

Peter Stam, AccuFund’s President adds, “It’s exciting to partner with RJF and see first-hand how streamlined accounting and fundraising functions directly correlates to less time spent on administrative duties and more time spent with their donors helping their community. That’s our hope for all our customers.”

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About AccuFund

AccuFund, Inc. provides accounting and fundraising solutions to nonprofit organizations. The AccuFund Accounting Suite, available on-premise or cloud, is an affordable, flexible, easy-to-use accounting solution. AccuFund CRM for Salesforce is a cloud-based fundraising and constituent relationship management (CRM) solution designed to improve your nonprofit’s development activities by optimizing your Salesforce donor database. AccuFund CRM is integrated with AccuFund’s nonprofit accounting solutions.

AccuFund’s products are available exclusively through Value Added Resellers (VARs) located throughout the United States. The VARs provide AccuFund’s customers with cost-effective onsite training and installation assistance. For more information, call 877-872-2228, email sales@accufund.com or visit www.accufund.com/EA.

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