



Association for  
Enterprise  
Opportunity

# Chief Financial Officer (CFO) and Accounting Services

**Issued by:**

Association for Enterprise Opportunity (AEO)

**Date Issued**

December 5, 2024

**Proposal Submission Deadline:**

**December 20, 2024**

**Contact Information:**

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## I. Introduction

The Association for Enterprise Opportunity (AEO), the leading voice of innovation in microbusiness and small business policy and programming in the United States, is seeking proposals from qualified firms or individuals to provide **CFO and accounting services**. These services will ensure sound financial management, compliance, reporting, and strategic financial oversight to support AEO's mission of creating economic opportunity and equity for rural and urban entrepreneurs.

## II. Background

Founded in 1991, AEO works at the intersection of policy, practice, and research to empower underserved entrepreneurs. AEO is a nonprofit organization with a national footprint and requires financial management expertise to maintain compliance with nonprofit regulations, optimize financial operations, and support growth and sustainability.

AEO operates with a diverse funding base, including grants, donations, corporate sponsorships, and earned revenue streams. The selected provider will play a critical role in managing this complexity.

## III. Scope of Services

The selected firm or individual will be responsible for providing the following services:

### 1. CFO Services

- a. Develop and oversee AEO's financial strategy and annual budgets.
- b. Prepare financial forecasts, reports, and analyses for the CEO, Board of Directors, and funders.
- c. Ensure compliance with federal, state, and local financial regulations and reporting requirements.
- d. Identify and manage financial risks and opportunities.

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- e. Support grant proposal budgeting and financial reporting for grant compliance.
  - f. Provide strategic financial insights to enhance organizational sustainability.

## **2. Accounting Services**

- a. Prepare monthly, quarterly, and annual financial statements in accordance with Generally Accepted Accounting Principles (GAAP).
- b. Oversee accounts payable and receivable processes.
- c. Manage payroll processing and related tax filings.
- d. Coordinate the annual audit and prepare audit schedules as required.
- e. Maintain compliance with all accounting and reporting requirements, including those related to restricted funding.

## **3. Bookkeeping Services**

- a. Maintain accurate and up-to-date financial records for AEO.
- b. Record all financial transactions and ensure proper classification.
- c. Reconcile bank accounts, credit card accounts, and other balance sheet items.
- d. Process expense reimbursements for employees and contractors.
- e. Track and manage program-related financial activities, including grant expenditures and restricted funds.

## **IV. Qualifications**

The ideal firm or individual will have the following qualifications:

- Proven experience in nonprofit financial management, including federal grant compliance.
- CPA certification (preferred).
- Familiarity with nonprofit accounting software, such as QuickBooks, NetSuite, or similar systems.
- Demonstrated ability to communicate financial information to diverse stakeholders, including board members and non-financial staff.
- Strong references from similar nonprofit organizations.

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## V. Proposal Requirements

Respondents must include the following in their proposals:

- 1. Cover Letter**
  - a. A brief statement of interest and qualifications.
- 2. Experience and References**
  - a. Description of similar projects or clients served.
  - b. At least three professional references.
- 3. Proposed Approach**
  - a. Outline of your approach to delivering the Scope of Services.
- 4. Team Composition**
  - a. Bios of key personnel who will work with AEO.
- 5. Fee Structure**
  - a. Detailed pricing, including hourly rates or retainer fees.
- 6. Compliance Documentation**
  - a. Proof of licensure, certifications, or any required legal compliance.

## VI. Evaluation Criteria

Proposals will be evaluated based on:

- Relevant experience and expertise (40%).
- Approach to service delivery (30%).
- Cost-effectiveness (20%).
- References and past performance (10%).

## VII. Submission Instructions

All proposals must be submitted electronically to by **December 20, 2025**. Late submissions will not be considered. Questions regarding this RFP must be directed to **Marieka Walsh, [mwalsh@aeoworks.org](mailto:mwalsh@aeoworks.org)** by **December 11, 2025**.

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## VIII. Timeline

- **RFP Release Date:** December 5, 2025
- **Deadline for Questions:** December 11, 2025
- **Proposal Submission Deadline:** December 20, 2025
- **Selection Announcement:** January 20, 2025

## IX. Contact Information

### Association for Enterprise Opportunity (AEO)

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