Jennifer Coates

PARTNER

Jenny Coates shares the same passion for achieving her nonprofit clients' goals as the organizations themselves. An accessible, trusted advisor, she puts excellence in client service first in guiding clients through audit and financial reporting matters.

Jenny takes a hands-on, straightforward approach, balancing the practical and technical aspects of her accounting services. Clients rely on her real-time advice on myriad complex accounting issues, from audit and financial reporting issues, new accounting standards, governance, board structure, and process improvements to public support test and the appropriate design and resources for finance departments. She plays a critical role in helping clients manage risk, reduce costs, increase efficiency, and remain compliant so they can stay focused on their missions. Jenny also oversees Lutz and Carr's Employee Benefit Plans practice, as well as serves as treasurer for a not-for-profit organization in New York.

Before joining Lutz and Carr, Jenny led the finance department of a nonprofit organization and spent more than 15 years in public accounting, including in management positions at a "Big 4" accounting firm and a large regional public accounting firm. Her broad experience enables her to see situations from her client's perspective and understand the nuances of each organization.

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- New York State Society of Certified Public Accountants (NYSSCPA)

Representative Experience

- Assisted a not-for-profit cultural arts organization in developing and establishing a more efficient inventory counting system. The process of counting annual inventory had been extremely costly and disruptive to the organization's program activities. The new system reduces costs and administrative burden, enabling the organization to pursue and undertake additional program activities.
- Advised on finance processes and procedures for a not-for-profit museum opening its first permanent public exhibition space. The museum's operations had recently grown significantly and become much more complex, while its finance function failed to provide accurate, timely, or useful information and required updating.

EDUCATION & CERTIFICATIONS

Certified Public Accountant (Texas, 2000)

B.B.A, The University of Texas at Austin (1997)

SERVICES

NOT-FOR-PROFIT AUDIT