



**Request for Proposals for Auditing and IRS Form 990 Preparation Services
for
The Florida Endowment Foundation for Vocational Rehabilitation, Inc.
dba The Able Trust**

The Florida Endowment Foundation for Vocational Rehabilitation, Inc. dba The Able Trust is seeking proposals from Certified Public Accounting firms with experience in the non-profit sector to perform the annual audit of financial statements and prepare IRS Form 990. **Please note that The Able Trust meets the state funding threshold for a single audit.**

Definition: As required by FS 413.615 (11) ANNUAL AUDIT - "The board shall provide for an annual financial audit of the foundation in accordance with s. 215.981."

Required Deliverables: The draft audit report and Communication with Those Charged with Governance are to be issued by the audit firm preferably by **October 31 but no later than November 15**. A Management Representation letter will be prepared by the audit firm upon the Board of Directors' approval of the audit report.

The draft IRS Form 990 is to be issued by the audit firm no later than April 15th of each year, one month prior to the extended due date.

Dates of Performance: The agreement will be for three years of annual audits (state fiscal years 2026, 2027, and 2028). Performance of each annual audit will occur as agreed between The Able Trust and the selected auditing firm.

Responses Should Include:

1. A description of how the audit will be performed.
2. Information on the legal structure of the auditing firm.
3. For the firm's office that will be assigned responsibility for the audit, provide experience with similar non-profit entities.
4. Resumes for engagement team personnel assigned to the audit and 990.
5. A detailed cost proposal that includes the following:
 - a. Costs and payment schedule for both a one-year and a three-year contract.
 - b. An itemized estimate of all out-of-pocket expenses, including but not limited to:
 - i. Administrative or technology fees
 - ii. Travel and meals
 - iii. Third-party costs such as confirmations or data-processing fees
 - iv. Any other reimbursable expenses or charges
 - c. Disclosure of any additional fees that may apply under certain circumstances (e.g., expanded scope, additional procedures, unforeseen complexities).
6. References.
7. Most recent Peer Review report.

Proposal Due Date: All proposals are due via email no later than 5:00 p.m. April 30, 2026 addressed to arnaldo@abletrust.org

Right to Withdraw RFP: The Florida Endowment Foundation for Vocational Rehabilitation, Inc. dba The Able Trust is not required to accept the lowest bidder and reserves the right to withdraw this Request for Proposal (RFP) at any time.

All questions may be directed to Allison Chase, President & CEO at 850-566-9606 or allison@abletrust.org.