



Kurtis Smith, LLC

Dedicated. Experienced. Nonprofit Focused.

Services for Not-For-Profit Organizations

Audit and Assurance

- Financial statement audits
- Reviews and compilations
- Agreed-upon procedures
- Internal control assessments
- Best practices for governance and risk management

Accounting and Advisory

- Technical accounting research
- Policies & procedures development
- Internal controls and risk mitigation guidance
- Client accounting services
- Entity structuring and governance consultation

Specialized Nonprofit Accounting Support

- Gifts-in-kind reporting
- Revenue recognition for contributed and earned income
- Endowment funds and restricted net assets
- Affiliated entities and inter-entity transactions
- Consolidation and beneficial interest considerations
- International operations guidance

Our work is designed to help nonprofit organizations grow, strengthen trust with donors, and enhance long-term sustainability.

Our Not-for-Profit Expertise

For more than thirty years, Kurtis Smith has assisted a wide spectrum of nonprofit organizations, including:

- Christian-based ministries
- Churches
- Public and private foundations
- Private schools
- Arts organizations
- Camps and conferences
- Fraternities
- Clubs and associations
- Cooperatives
- Rescue missions
- Training programs and counseling organizations
- Mission organizations with international operations
- Animal welfare and medical organizations

We also regularly support organizations with multi-entity structures, affiliation models, and umbrella arrangements.



ABOUT OUR FIRM



Professional Membership & Involvement

We stay actively connected to the nonprofit accounting community to bring current knowledge and best practices to every engagement.

- AICPA Not-for-Profit Section Member
- Allinial Global Member Firm
- Participation in conferences, professional forums, and continuing education

These affiliations provide our clients with the benefit of collective expertise, resources, and insight into emerging issues affecting the nonprofit sector.

Kurtis Smith, LLC is a niche CPA firm dedicated to serving not-for-profit organizations. Founded on more than three decades of nonprofit accounting and audit experience, we provide the expertise of a seasoned partner combined with the responsiveness of a small, service-oriented team.

We work with nonprofit leaders who value accuracy, transparency, and stewardship—and who want a CPA partner who understands the unique challenges of mission-driven organizations.

As a one-partner firm supported by a team of skilled professionals, we bring focused attention to every engagement while drawing on the global resources of Allinial Global, an association of more than 270 member firms worldwide.

WHY NONPROFITS CHOOSE US

- 30+ years of nonprofit-specific experience ranging from small ministries to complex multi-entity structures.
- Partner-led service—you work directly with the decision maker.
- Nimble, responsive, and client-focused firm approach.
- Deep technical expertise in nonprofit accounting standards and reporting.
- Access to large-firm resources through Allinial Global and AICPA NFP membership.
- Understanding of governance and internal controls, enhanced by experience leading internal audit engagements for publicly traded companies.

OUR APPROACH & WHAT TO EXPECT

We tailor our services to support your organization's mission.

- Clear and consistent communication throughout the engagement.
- Efficient and organized audit processes designed for minimal disruption.
- Thoughtful guidance on governance, controls, and compliance.
- Practical recommendations grounded in real nonprofit experience.
- Support for board meetings and stakeholder presentations.

Our goal is to equip nonprofit boards, leadership teams, and donors with confidence in financial reporting and stewardship.



MEET OUR TEAM

Our team includes experienced professionals dedicated to serving mission-driven organizations. Each team member plays a key role in ensuring timely, accurate, and high-quality service.



KURTIS SMITH, CPA FOUNDING PARTNER

Kurtis is a seasoned CPA and the founding partner of Kurtis Smith, LLC, bringing more than 30 years of experience in accounting, assurance, and advisory services. Known for his quiet leadership and strong client relationships, he provides nonprofits with clear, reliable financial insight grounded in deep technical expertise.

His background includes extensive work in financial statement assurance, GAAP research, internal audit, and governance—experience that helps nonprofit organizations navigate complex accounting requirements with confidence. Over the course of his career, he has served a wide range of clients, from mission-driven nonprofits to privately held businesses and large corporations.

After nearly three decades in the Dallas area, Kurtis relocated to Colorado to enjoy the outdoors while continuing to focus his practice on serving not-for-profit organizations with accuracy, integrity, and personal attention.



BRADLEY SMITH SENIOR ACCOUNTANT

Bradley joined the firm in 2022 and brings experience serving a wide range of organizations, from faith-based nonprofits to publicly traded companies. His background includes financial statement audits, employee benefit plan engagements, internal audit work, and various compilation and consulting projects. He particularly values working with not-for-profit organizations because of the mission-driven impact behind the numbers.

A graduate of Texas A&M University—Commerce, Bradley is actively pursuing his CPA license and is committed to strengthening his technical expertise through ongoing study and practical application.

Outside of work, Bradley enjoys time with his family, traveling, and watching historical documentaries. He is an active member of Lakepointe Church in Rockwall, where he has attended since 2019.



ALLY MIDDLETON SENIOR ACCOUNTANT

Ally Middleton brings strong project management, financial acumen, and operational discipline to her role at Kurtis Smith, LLC. She supports the firm's nonprofit clients through audit, review, and financial statement preparation work, drawing on experience managing accounting operations for the Denver Area Council BSA.

Her background includes distinguished service in the U.S. Army, where she led medical training programs, improved inventory processes, and supported clinic operations with precision and professionalism—skills that translate seamlessly into her work with mission-driven organizations.

Ally holds a B.S. in Project Management from Colorado State University and an M.B.A. in Finance at the University of Colorado—Colorado Springs. Her commitment to accuracy, efficiency, and continuous learning makes her a valuable part of the firm's nonprofit-focused team.



STEPHANIE WILHELMS ASSOCIATE

Stephanie Wilhelms joined the firm in 2024 and supports a broad range of clients, including faith-based nonprofits and professional service organizations. Her experience includes financial statement audits, employee benefit plan engagements, and client accounting services, giving her a solid foundation in both assurance and operational finance.

Before entering public accounting, Stephanie gained meaningful experience in local government and hospitality operations, where she managed financial processes, receivables, and internal controls. This diverse background contributes to her practical, solutions-oriented approach when serving mission-driven organizations.

Since relocating to the Dallas area in 2016, Stephanie has been active in her community and is currently pursuing her B.B.A. in Accounting. Outside of work, she enjoys time with her husband and two sons and is a long-time member of Lakepointe Church in Rockwall.

