



About Roberta

Prior to founding Roberta Katz Consulting, Roberta held senior financial management positions for fifteen years at major nonprofit organizations where she successfully overhauled their finance departments; improved the accuracy and timeliness of their financial reporting; implemented and administered automated systems; and established, documented and enforced policies and procedures and internal accounting controls.

Roberta began her career as an auditor for PricewaterhouseCoopers (PwC), a Big Four accounting firm and as a tax manager for a mid-sized CPA firm. Fifteen years ago, Roberta decided to redirect her career to the nonprofit sector using the skills and experience she gained in the for-profit sector to help nonprofit organizations build and maintain strong finance departments.

Based on her experience dealing with the day-to-day challenges nonprofit finance departments face, Roberta provides her clients the guidance and tools they need to successfully meet these challenges. Roberta's commitment and dedication to her clients has led to significant improvements in the efficiency and effectiveness of the finance departments of many nonprofit organizations.

Nonprofit Experience

- Avon Breast Cancer Crusade, LLC, Controller
- JCCA (Jewish Child Care Association), Director of Finance
- Community Access, Inc., Director of Finance
- INCLUDEnyc (formerly Resources for Children With Special Needs), Controller
- Hispanic Counseling Center, Inc. Assistant Controller

Career Highlights

Financial Management

- Revamped the Finance Departments for agencies with operating budgets ranging from \$35 million to \$110 million implementing structure, systems, policies and procedures and internal controls.
- Published, implemented and maintained comprehensive Accounting Policies and Procedures Manuals to ensure ongoing operational efficiencies and governance, accuracy and reliability of financial statements and well defined roles and responsibilities.
- Identified, evaluated and implemented internal controls to mitigate risk, increase transparency and safeguard agency assets.
- Served on the Board Strategic Planning Committee for an agency with a \$110 million operating budget resulting in structural changes to the agency and significant cost savings.
- Responsible for the efficient financial dissolution of an agency with a \$40 million operating budget.

Financial Reporting

- Implemented and executed a formal financial closing process resulting in more accurate and timely financial reporting and better monitoring of budget to actual results.
- Improved and streamlined workflow to maximize efficiencies in the financial reporting process.
- Established and oversaw an efficient process for preparation and completion of the annual financial audit significantly reducing the duration and cost of the audit.

Technology

- Implemented and administered expense management and invoice processing software eliminating paper documents, maximizing productivity, increasing transparency and facilitating document flow and approvals.
- Implemented and managed budget and financial planning software increasing accuracy and timeliness in budget preparation, monitoring and forecasting.

Education

Roberta is a graduate of CUNY, Bernard M. Baruch Graduate School with a Master of Business Administration, Accounting and a graduate of Stern College for Women with a Bachelor of Arts, Mathematics.

Quick Links

- Home
- About
- Webinars
- Services
- Articles
- Covid-19 Resources
- Contact
- Privacy Statement

Book Appointment

Schedule a Complimentary Consultation

Contact

Phone: (917) 359-1158  
Email: robertapkatz@gmail.com  
LinkedIn: www.linkedin.com/in/robertakatzmba

Roberta Katz Consulting

61-43 186th Street, Suite 606 Fresh Meadows, NY 11365

