

NGO Financial Management Guide

Nonprofit, NGO & Social Sector

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a financial management framework — fund accounting, budgeting, controls, reporting, audit and restricted-vs-unrestricted funds — with policies (delegation, procurement, cash) and transparency (donor and public reporting). Use this to manage money with transparency. Adapt it with your accountant and auditor. For a formal policy document use the Financial Policy Builder.

Purpose of this tool & output

Manage money with transparency

How the output is used

Use the guide to manage money with transparency across budgeting, spending and reporting.

Important cautions

AI-generated framework; adapt with your accountant and auditor.

Companion documents

- Fund Accounting Setup
- Organisational Budget Builder
- Financial Report Builder
- Utilisation Certificate Builder
- Internal Controls Framework
- Financial Policy Builder

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.