REQUEST FOR QUOTATIONS

Independent Audit and Tax Services

Fiscal Year Ending September 30, 2026

WESTERN CONNECTICUT AREA AGENCY ON AGING, INC.

84 Progress Lane, 2nd Floor | Waterbury, Connecticut 06705

RFQ Issued	July 13, 2026
Proposal Deadline	**August 14, 2026, by 4:00 p.m. ET**
Selection Notification	**No later than August 21, 2026**
Required Completion	March 1, 2027, unless mutually extended; auditor to file required extensions

Electronic submissions: Adel Mousa, Chief Financial Officer | amousa@wcaaa.org

1. Invitation

Western Connecticut Area Agency on Aging, Inc. (WCAAA) invites qualified independent certified public accounting firms to submit quotations for financial statement audit, federal and state compliance audit, tax preparation, and related professional services for the fiscal year ending September 30, 2026.

WCAAA seeks a responsive and experienced firm with demonstrated knowledge of nonprofit organizations administering federal and state awards, pass-through funding, and subrecipient relationships. The selected firm must be properly licensed, independent, and qualified to perform the engagement in accordance with applicable professional and governmental auditing standards.

WCAAA may consider a multi-year engagement renewable annually for up to five years at the Agency's discretion, subject to satisfactory performance, continued independence, mutually acceptable fees, and organizational needs.

2. Organization Overview

WCAAA is a nonprofit Area Agency on Aging serving older adults, individuals with disabilities, caregivers, and community partners throughout a 41-town planning and service area in Western Connecticut.

The Agency administers federal, state, Medicaid, philanthropic, and other funding, including programs supported under Title III of the Older Americans Act. WCAAA also awards funding to subrecipients that provide nutrition, social services, caregiver support, and other community-based programs.

WCAAA operates with an annual budget of approximately $11 million, employs approximately 75 individuals, and serves more than 10,000 individuals annually. Its fiscal year begins October 1 and ends September 30.

3. Engagement Objective

The objective of the engagement is to express an independent opinion as to whether WCAAA's financial statements are presented fairly, in all material respects, in conformity with U.S. generally accepted accounting principles, and to complete all related compliance, reporting, and tax services required by the engagement.

4. Standards and Scope of Services

The engagement must be performed in accordance with all standards and requirements applicable to WCAAA, including, as relevant:

- U.S. generally accepted auditing standards;
- Government Auditing Standards issued by the Comptroller General of the United States;
- Federal Single Audit requirements under the Uniform Guidance, 2 CFR Part 200;
- Connecticut State Single Audit requirements and other applicable state requirements;
- U.S. generally accepted accounting principles applicable to nonprofit organizations; and
- Federal and state tax and informational filing requirements applicable to WCAAA.

The selected firm will provide the following services, as applicable:

1. Audit WCAAA's financial statements for the fiscal year ending September 30, 2026.
2. Perform the Federal Single Audit and Connecticut State Single Audit, when required.
3. Evaluate and report on internal control and compliance with applicable federal, state, grant, and contractual requirements.
4. Prepare IRS Form 990 and all related schedules, including Form 990-T if applicable.
5. Prepare the required financial statements, audit reports, schedules, management communications, and governance communications.
6. Present the audit results to WCAAA management, the Finance and Audit Committee, and/or the Board of Directors, if requested.
7. Provide reasonable consultation on accounting, audit, tax, and compliance matters directly related to the engagement.

5. Required Deliverables

The engagement is expected to include the following, as applicable:

- Independent Auditor's Report;
- Statement of Financial Position;
- Statement of Activities;
- Statement of Functional Expenses;
- Statement of Cash Flows;
- Notes to the Financial Statements;
- Schedule of Expenditures of Federal Awards;
- Schedule of Expenditures of State Financial Assistance;
- Reports on Internal Control and Compliance;
- Schedule of Findings and Questioned Costs, if applicable;
- Management Letter and required governance communications; and
- IRS Form 990 and related schedules.

All required reports, statements, schedules, and tax filings must be completed on a schedule that enables WCAAA to satisfy all applicable filing, contractual, regulatory, and governance deadlines. The final audit package must be completed no later than March 1, 2027, unless an extension is mutually agreed upon in writing by WCAAA management and the selected auditor. The selected auditor will be responsible for preparing and filing any required extension requests on WCAAA's behalf, subject to WCAAA management's review and authorization.

6. Minimum Qualifications

Proposing firms must:

- Be licensed and in good standing to practice public accounting in Connecticut;
- Meet all applicable independence requirements;
- Have relevant experience auditing nonprofit organizations receiving federal and state funding;
- Have experience performing Federal and Connecticut State Single Audits and auditing pass-through or subrecipient funding;
- Have experience preparing IRS Form 990;
- Maintain an acceptable peer review and appropriate professional liability insurance; and
- Have sufficient staffing and resources to complete the engagement within the required timeframe.

Preference may be given to firms with experience serving Area Agencies on Aging, human service organizations, Medicaid-funded programs, or similarly complex nonprofit entities.

7. Proposal Requirements

Proposals should be concise and include only the following:

Firm Qualifications: A brief overview of the firm and its relevant experience with nonprofit audits, federal and state-funded programs, Single Audits, subrecipient funding, and IRS Form 990 preparation.

Engagement Team: Identification of the proposed engagement partner and manager, with a brief summary of their relevant qualifications and experience.

Approach and Timeline: A brief description of the proposed audit approach and anticipated schedule for planning, fieldwork, draft reports, final reports, and tax return preparation.

Fee Proposal: A fixed-fee quotation for the financial statement audit, Federal Single Audit, Connecticut State Single Audit, IRS Form 990, Form 990-T if applicable, and any other anticipated fees or expenses. Identify any assumptions and proposed annual fee increases for renewal years.

References and Peer Review: Contact information for two current or recent nonprofit clients of comparable size or complexity, and a copy of the firm's most recent peer review report, if available.

Requested Fee Format

Service	Proposed Fee
Financial statement audit, excluding Single Audits	$
Federal Single Audit	$
Connecticut State Single Audit	$
IRS Form 990 and related schedules	$
IRS Form 990-T, if applicable	$
Other anticipated fees or expenses	$

8. Workpaper Retention and Access

Audit workpapers must be retained for at least six years, or longer when required by applicable law, regulation, contract, or professional standard. Workpapers must be made available upon request to WCAAA and authorized federal, state, or regulatory representatives.

9. Evaluation and Selection

Proposals will be reviewed by WCAAA management and members of the Finance and Audit Committee. Selection will be based on the firm determined, in WCAAA's judgment, to be best qualified and to provide the greatest overall value.

- Relevant nonprofit and governmental audit experience and qualifications of the proposed engagement team;

- Proposed audit approach and ability to meet the required timeline;
- References, peer review, and professional standing; and
- Proposed fees, responsiveness, understanding of WCAAA's operating environment, and overall value.

WCAAA is not required to select the lowest-cost proposal. Respondents may be asked to participate in an interview or provide clarification regarding their submission.

10. Procurement Schedule

Activity	Date
RFQ issued and posted	July 13, 2026
Proposal submission deadline	**August 14, 2026, by 4:00 p.m. ET**
Proposal review and interviews, if needed	August 17-20, 2026
Selection notification	**No later than August 21, 2026**
Engagement planning and contracting	Following selection
Fiscal year-end	September 30, 2026
Final audit package completed	March 1, 2027, unless mutually extended; auditor to file required extensions

WCAAA reserves the right to revise the procurement schedule as necessary.

11. Submission Instructions

Proposals must be received electronically no later than Friday, August 14, 2026, at 4:00 p.m. Eastern Time.

Submit to:
Adel Mousa, Chief Financial Officer
amousa@wcaaa.org
Subject: WCAAA Audit Services Proposal

Proposals should be submitted in PDF format. An electronic acknowledgment of receipt will be provided. This Request for Quotations will also be posted on WCAAA's website. Late proposals may be rejected, and respondents are responsible for confirming timely receipt.

WCAAA anticipates notifying respondents of the selection decision no later than August 21, 2026.

12. Official Contacts

Adel Mousa
Chief Financial Officer
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13. Reservation of Rights

WCAAA reserves the right to accept or reject any or all proposals; waive minor irregularities; request clarification or additional information; conduct interviews; negotiate scope, fees, schedule, or contractual terms; select a firm other than the lowest-cost respondent; amend or cancel this solicitation; and take any action determined to be in the best interests of WCAAA.

All costs associated with preparing and submitting a proposal are the responsibility of the respondent. Submission of a proposal does not create a contractual obligation. An engagement becomes effective only upon execution of a written agreement approved by WCAAA.

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