Preservation
BUFFALO NIAGARA

October 19, 2026

**Request for Proposal – 2025 Form 990 Tax Preparation Services**

Preservation Buffalo Niagara (PBN) is a nonprofit organization dedicated to protecting and celebrating the historic places that make Western New York special. PBN is seeking proposals from qualified CPA firms to prepare and file its federal and New York State annual nonprofit returns for fiscal year 2025. We prefer a locally owned and operated accounting partner looking to establish an ongoing relationship for future years as our organization continues to grow.

**Scope of Services**

The selected firm will timely prepare and electronically file, as applicable:

- IRS Form 990, including all required schedules and attachments
- New York State CHAR500, including required attachments
- General consulting and assistance throughout the year as needed
- No audit, review, or compilation is requested for the 2025 tax year

**Preferred Qualifications**

Preferred qualifications of the selected firm include:

- Nonprofit Form 990 and New York filing experience
- Locally owned and operated Western New York firm
- Experience with real estate owned by nonprofits, including historic preservation incentives
- Responsive communication and proactive nonprofit tax guidance

**Proposal Requirements**

Proposals must be submitted by 5pm on Friday October 23, 2026 and should include the following requested information . All submissions can be emailed to Bernice Radle, Executive Director, at **bernice@pbnsaves.org.** Questions are welcome and may be directed to the same email address.

- A brief firm overview and identification of the professional team who would serve PBN
- A summary of relevant nonprofit tax experience
- Your proposed fee for the FY2025 Form 990 and CHAR500, including when potential additional charges would apply
- Confirmation that the November 15, 2026 filing deadline can be met
- Two nonprofit client references with contact information.

PBN will evaluate all proposals based on relevant experience, timing, fees, references, local presence, and overall fit. PBN reserves the right to reject any or all proposals and negotiate the final scope and fees.