



2024 | BOSTON  
**INNOVATE**  
JMT CONSULTING

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THE EXPERTS IN  
MISSION-DRIVEN  
NONPROFIT FINANCE  
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~ PRESENTS ~

**INNOVATE 2024**

**MAY 1-3**

**Hilton Boston Park Plaza**

**STEPHANIE  
ROSE-BELCHER**



Chief Operating  
Officer, JMT  
Consulting

Sage



MARTUS



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bill



DAVIDOFF  
MISSION-DRIVEN BUSINESS STRATEGY



arreva  
Tech with Purpose. Driven by Cause.



tipalti



COMPLEAT  
for Non-Profits

Velixo

THE NONPROFIT TIMES  
The Leading Business Publication For Nonprofit Management



BROWN  
BAG  
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affinity  
TECHNOLOGY PARTNERS

Thank you to our generous sponsors!



# Learning Lab

Bring your questions  
to our experts!

By appointment only.





# Complimentary Headshots

Wednesday 6:00 pm - 8:00 pm

Thursday 10:45 am - 3:30 pm



Sponsored by:





# Thursday Night Event



- Join us for evening event at The Tower across the street from 6:30 – 9:00 pm for a buffet, cocktails, and games!
- We will have a Group Activity to support Rodman for Kids



Sponsored by:



# Complimentary Executive Coaching

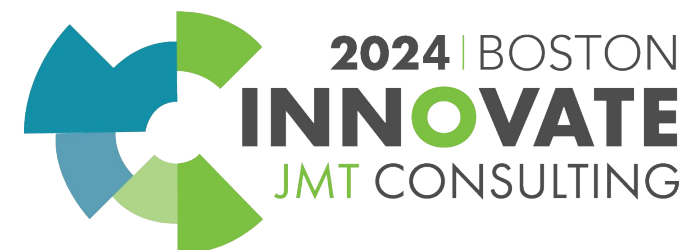
- Becoming stronger, more effective and more satisfied leaders
- Developing personal agency
- Better project management
- Creating improved working relationships with supervisors, peers and direct reports
- Having purpose and meaning in your work
- Improved social and emotional intelligence
- Better working relationships one-to-one and in groups
- Achieve your full potential
- Visioning the leader you see yourself becoming

Visit the Davidoff  
Strategy Booth to  
Sign up for an  
Appointment  
During the  
Conference!

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# Download the Innovate App!

Unlock the full potential of Innovate with the Aventri Events app, providing in-depth session details, venue maps, speaker information, and more

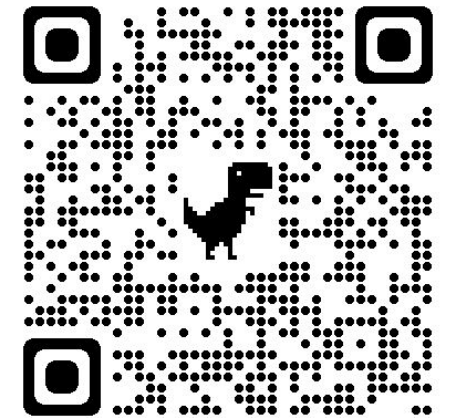
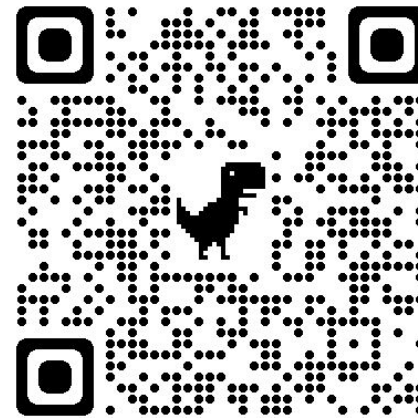
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WHEN PROMPTED ENTER:

Access Code: 466230

Login: Email Address

Password: Last Name (case sensitive)





## Booth Bonanza

Collect signatures from all of the exhibitors and bring back to the registration table in exchange for 3 raffle tickets!



Earn Raffle Tickets when you stop by each of our sponsors' booths.





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**JACQUELINE  
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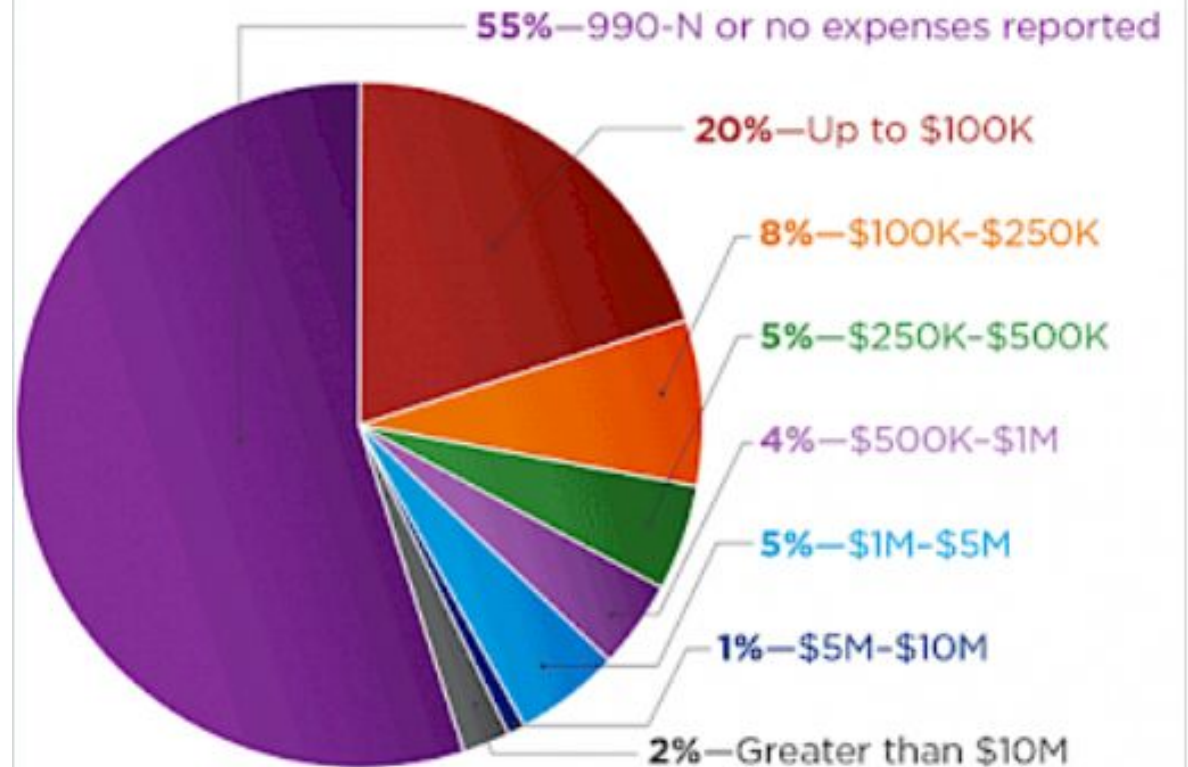


CEO & Founder,  
JMT Consulting

# The Nonprofit Sector

- **1.825M** nonprofits in 2019 (per IRS)
- 75% increase in number between 2000 and 2017
- 92% of nonprofits are **less than \$1M**
- **Only 3%** of nonprofit organizations have revenues greater than \$5,000,000
- >12 million people are employed by nonprofits — more than 10 percent of the total private workforce in the U.S. — with payrolls *exceeding construction, transportation, and finance*

## 501(c)(3) Charitable Nonprofits by Size (excluding private foundations)



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# Keynote Presentation

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**KEYNOTE  
PRESENTATION**



**AARON HARRIS**

Chief Technology Officer,  
Sage



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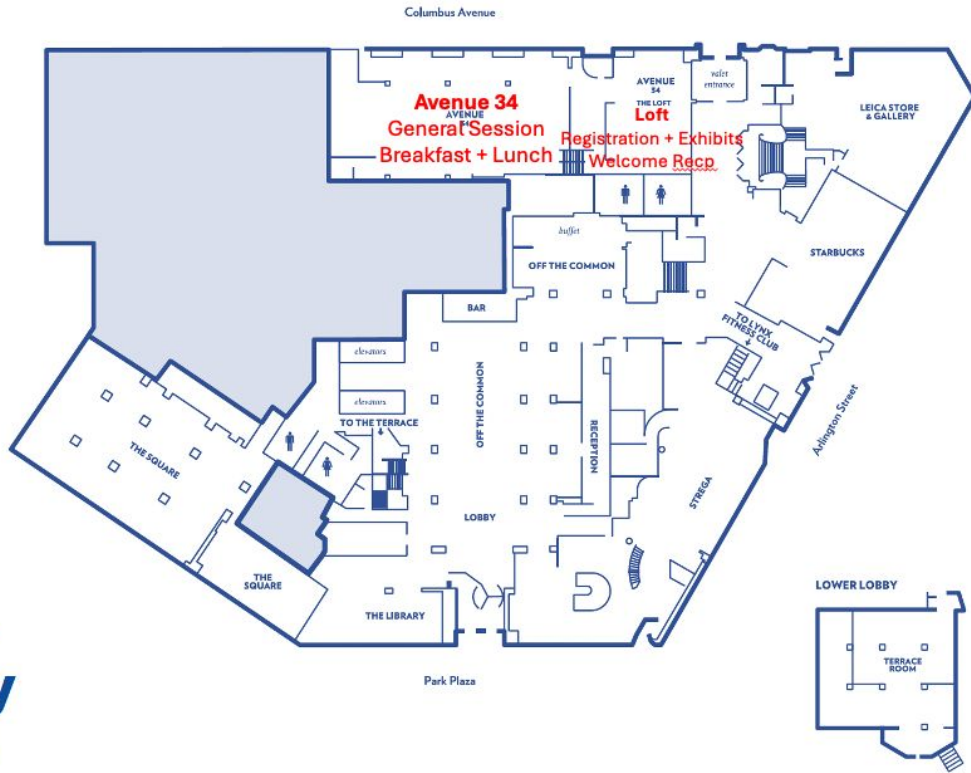
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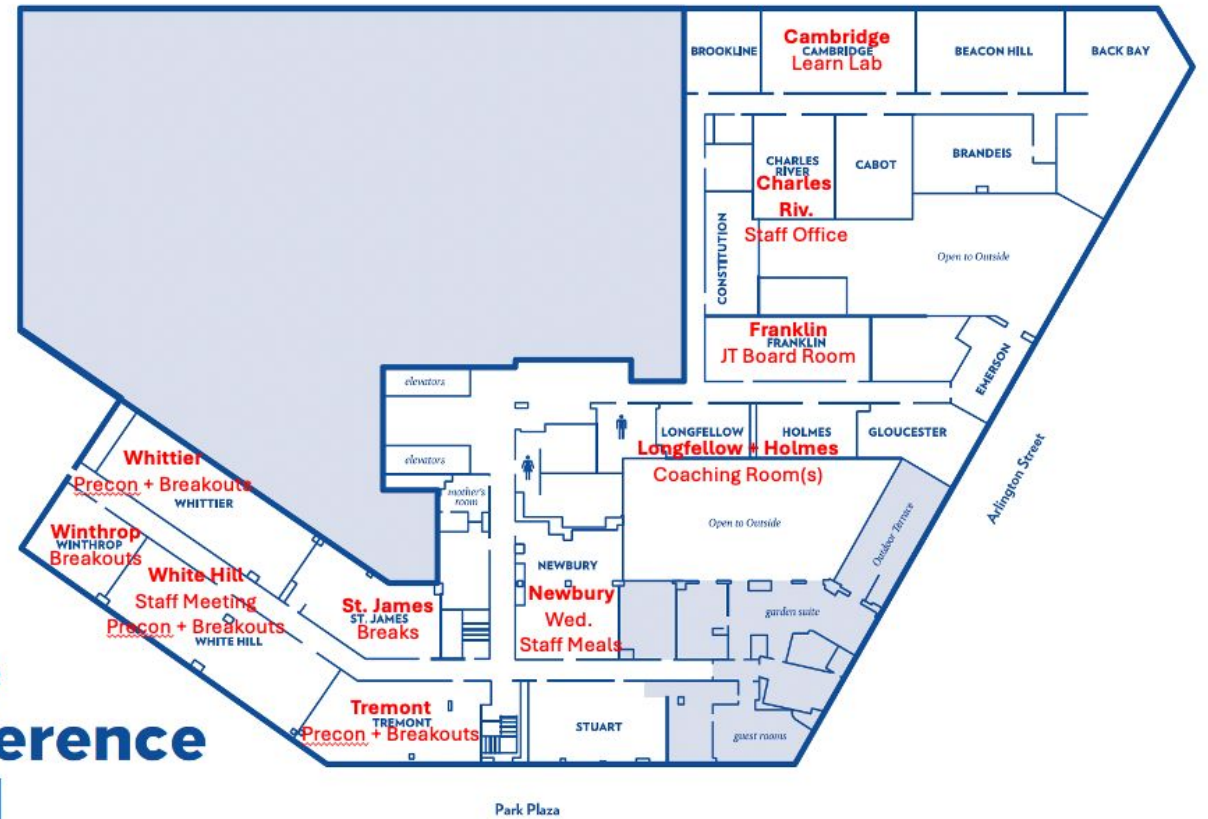
Thursday, May 2 <sup>nd</sup> Conference Agenda				
~ Learning Lab Open by Appointment ~ Davidoff Strategy Consultations by Appointment ~				
7:00 – 8:00 AM	Breakfast			
8:00 – 8:15 AM	Welcome by Founder & CEO Jacqueline M. Tiso			
8:15 – 9:30 AM	Keynote presented by Sage - Aaron Harris, Chief Technology Officer			
	Sage Intacct Track 1	Leadership/Third Party Track 2	MIP Accounting Track 3	Potpourri Track 4
9:45 – 10:45 AM	Intacct Unveiled: A Deep Dive into the Latest Enhancements and Tips for Nonprofits (1A)	Exploring Financial Planning and Analysis: Best Practices Unveiled (2A)*	Streamlining Operations: Embracing MIP's Import Functionality for Peak Efficiency (3H)	Conquering Depreciation: Navigating the Sage Intacct Fixed Assets Galaxy (1H)*
10:45 – 11:00 AM	Break			
11:00 – 12:00 NOON	Financial Reporting and Dashboards in Sage Intacct: Unleashing the Power of Customization (1B)	Seamless Transition: Looking at New Accounting Software (2B)*	The Art of Strategic Reporting: Unveiling MIP Reports Overview (3C)	Money Management for CFOs - (2E)*
12:00 – 1:30 PM	Lunch and Learn: Live Podcast - The Nonprofit Show with Julia Patrick 12:30-1:00 PM 1:00-1:30 PM Lunch Speaker David Greco - Ukraine: Lessons in Innovation - How Lessons Learned in the US Nonprofit Sector Are Being Applied in Ukraine - Introduction by Arreva			



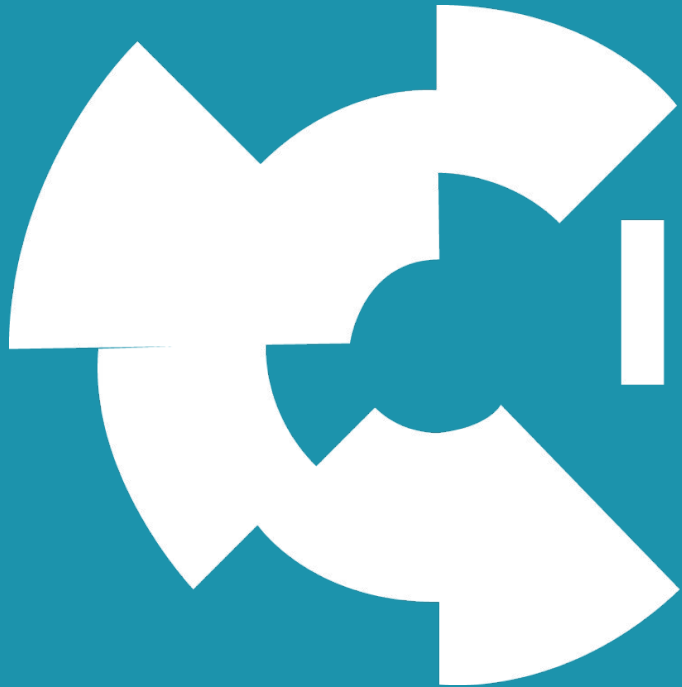


FOURTH FLOOR  
**Lobby**  
Level

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