



Crowe™ Tax Risk Assessment and Control  
(C-TRAC™) Private Foundation Suite

Trusted Advice From  
Experienced Private  
Foundation Specialists Using  
One-of-a-Kind Technology

# C-TRAC Private Foundation Suite

Crowe tax specialists developed the C-TRAC Private Foundation Suite to streamline the vigorous reporting requirements of the Form 990-PF and alternative investments to help you reduce time, risks, and costs. Crowe leveraged the best of its already proven solutions, C-TRAC and C-TRAC with Alternative Investment Module (AIM), and has added modules and features specific to private foundations.

## One-of-a-Kind Features

### **1. Web-Based, IRS-Approved, Easy to Use**

Supports IRS Forms 990-PF and 990T, extensions, and international disclosures (Forms 926, 8865, etc.).

### **2. Minimum Distribution Requirement Planning Tool**

Projects the required annual minimum distribution requirements at any given point during the year.

### **3. Federal Estimated Tax Calculator**

Calculates the quarterly federal excise tax and unrelated business income estimated tax payments.

### **4. Alternative Investment Module**

Aggregates Schedule K-1 and foreign corporation/partnership data and highlights federal, state, and international tax exposure.

### **5. State Module**

Streamlines information directly from AIM and completes all state income and attorney general filings, including extensions and estimates.

### **6. Automated Conflict of Interest Questionnaires**

Sends customizable conflict of interest statements to identify potential self-dealing and other business and family relationships.

### **7. Reporting**

Tracks due date and engagement status and analyzes data in detailed and summarized options.

*Crowe makes us feel valued as a client by providing accessibility to skilled resources and beneficial technology to streamline alternative investment tax compliance.*

*Crowe tax professionals help resolve the complex filings for our foundation with reasonable, well-thought-out solutions to mitigate taxes.*

*C-TRAC is a cost-effective alternative to our previous time-intensive processes. The solution provides the controls and reporting to improve accuracy and reduce the risks of missed deadlines and penalties.*

**J. David Maas,  
Chief Financial Officer  
Lumina Foundation for Education**

*Our transition to Crowe tax services and the use of C-TRAC was effortless. Crowe coordinated all aspects of our tax requirements seamlessly with one single point of contact for all communications.*

*Crowe is committed to understanding our organization and provides dedicated not-for-profit tax expertise we have not experienced from any other tax provider.*

*Using the C-TRAC solution has revolutionized our tax-exempt compliance and put us months ahead of our previous alternative investment process. The tool has substantially reduced the complexity and effort – leaving more time for other high-value tasks.*

**Stephanie Withers,  
Investment Accounting Manager  
W.K. Kellogg Foundation**

## Tax Expertise

Crowe doesn't invest only in technology. We also invest in identifying the best tax-exempt specialists around the country to serve our clients. Our national leaders have focused their careers on serving not-for-profit organizations.

Crowe structures its tax-exempt compliance and consulting group on a national basis, which means the entire team operates as one unit and brings its full resources together to serve clients across the country.

## Meet Our Team's Leaders



**Nicole Bencik**  
**CPA, MST**

Private Foundations Services Leader  
Chicago



**Geralyn Hurd**  
**CPA**

Tax Technology Services Leader  
Chicago



**Ken Keber**  
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**John Woodhull**  
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**Brittney Kocaj**  
**CPA**

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## Connect With Us

We are dedicated to the private foundation industry and eager to show you our one-of-a-kind solution.

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## About Crowe

“Crowe” is the brand name under which the member firms of Crowe Global operate and provide professional services, and those firms together form the Crowe Global network of independent audit, tax, and consulting firms. Crowe may be used to refer to individual firms, to several such firms, or to all firms within the Crowe Global network. The Crowe Horwath Global Risk Consulting entities, Crowe Healthcare Risk Consulting LLC, and our affiliate in Grand Cayman are subsidiaries of Crowe LLP. Crowe LLP is an Indiana limited liability partnership and the U.S member firm of Crowe Global. Services to clients are provided by the individual member firms of Crowe Global, but Crowe Global itself is a Swiss entity that does not provide services to clients. Each member firm is a separate legal entity responsible only for its own acts and omissions and not those of any other Crowe Global network firm or other party. Visit [www.crowe.com/disclosure](http://www.crowe.com/disclosure) for more information about Crowe LLP, its subsidiaries, and Crowe Global.

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