



biography

Casse L. Tate CPA, CAP
Partner

CONTACT CASSE

TEL

317.580.2153

FAX

317.805.2253

E-MAIL

ctate@ksmcfs.com

PROFILE

Casse Tate is a partner with KSM Charitable Foundation Services (KSMCFS), where she works with private foundations and other grantmakers to identify processes to increase the efficiency and impact of their charitable contributions. Casse and the KSMCFS team provide back-office services to complete the grantmaking cycle, including strategic and business planning, compliance oversight, communication with grant applicants and recipients, and disbursements of grants. As a result, donors, directors, or staff are alleviated of the burden of administrative details, allowing them more time and resources to focus on the merits of grant requests.

Casse Tate is also a partner in Katz, Sapper & Miller's Business Advisory Group and co-chairs the firm's Not-for-Profit Services Group, where she helps tax-exempt organizations navigate complex tax laws and provides consulting on public support issues to ensure necessary compliance requirements are met. Additionally, she assists organizations with conveying a positive impression of their programs and activities on the Form 990 tax return. Casse's knowledge of not-for-profits is well rounded, equipping her to address operational issues organizations routinely face.

EDUCATION

Casse received both a Bachelor of Arts degree in accounting and a Master of Science degree in accounting from Ball State University. She has also earned the Chartered Advisor in Philanthropy® (CAP) professional designation from The American College of Financial Services.

ASSOCIATIONS AND COMMUNITY INVOLVEMENT

Casse is a member of the American Institute of CPAs and the Indiana CPA Society. She is the recipient of the 3 Under 30 and Emerging Leader Awards from the Paul W. Parkison Department of Accounting at Ball State, as well as the Emerging Leader Award from the Indiana CPA Society, in recognition of her success and leadership positions in the accounting profession. Casse is also a 2010 graduate of the United Way of Central Indiana's leadership development program, Leadership United. She was both a committee and board member (and now emeritus board member) of Dress for Success Indianapolis, and she has served as a member of the Young Professionals Advisory Board for Children's Bureau, Inc., one of Indiana's oldest child and family services agencies. Casse also plays an active role as a member of Ball State's Accounting Advisory Council, providing counsel on curriculum and offering guidance about student recruitment, retention, and employment.