



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, where she helps tax-exempt organizations navigate the 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 a board member of the Ball State Accounting Advisory Council and an emeritus member of Dress for Success Indianapolis. Additionally, Casse is a 2010 graduate of the United Way of Central Indiana's leadership development program, Leadership United. In 2018, Casse received the Emerging Leader Award from the Paul W. Parkison Department of Accounting at Ball State University in recognition of her success and recent leadership positions in the accounting profession.