

## CORPORATE PROFILE

**BIG ACCOUNTING MADE PERSONAL**

*Dynamic. Fun. People driven High-touch client service. Community involvement. These concepts aren't usually associated with accountants, but they are with Burr Pilger & Mayer LLP (BPM).*



Firm Founders: Burr, Pilger & Mayer

Not your typical number crunchers, the San Francisco Bay Area's leading regional accounting firm is known for its innovative, value-added solutions to clients' tax and business challenges.

The firm also engages in some nonstereotypical behavior. From borrowing best practices of cultural anthropologists and

Navy SEALs to staffing reading programs at local public schools, BPM redefines modern notions of accounting and business consultancy.

There are some bows to convention BPM's more than 325 employees, practicing in five Bay Area locations, do provide the full range of accounting advisory services — tax, assurance, wealth management and business consulting.

By applying these levels of financial and business expertise, BPM has been breaking the financial code for individuals and business clients, publicly traded companies and privately held businesses in the San Francisco Bay Area market for the past 23 years.

**UNCONVENTIONAL EXCELLENCE**

BPM distinguishes itself through its emphasis on people. Commitments to clients, creative solutions, taking care of employees and community trusteeship are the pillars of the firm.

"The people who work at our company care. They care about clients and their fellow employees. They care about their families and the community. When you wake up in the morning and you care, you will do a better job," explains Managing Partner Stephen D. Mayer.

For BPM, caring and following the path less traveled have proven to be smart business.

Since its inception in 1986, BPM's annual growth has averaged more than 20 percent each year, an extraordinary benchmark for any company.

Of even greater importance has been the quality of BPM's growth. It has maintained its standards of excellence through multiple mergers and an expanded footprint, garnering such accolades as "Best Places to Work" and "Best of Best" from industry and business observers.

**LOCAL ADVISERS FOR WORLDWIDE BUSINESS**

The story behind BPM's wide recognition is its sustained ability to compete against the Big Four accounting firms as well as large national firms. Beating the giants at their own game has always been part of the plan.

BPM partners and advisers make decisions locally. That means responsive, innovative solutions tailored to each client's issue. This contrasts the Big Four's hierarchy-heavy process of prolonged decisionmaking made several time zones away.

With strategic locations in San Francisco, Palo Alto, Walnut Creek, Novato and San Jose, BPM serves clients where they work and takes the time to understand clients' companies.

As the Bay Area's largest regional accounting firm, BPM advises business leaders operating on a world platform More than 80 percent of BPM partners trained and practiced with the large accounting firms, and they bring that unique depth of experience and knowledge to BPM.

The firm's national and global reach is extended through network affiliations in The Leading Edge Alliance. BPM clients have access to the firm's working partnerships with more than 120 accounting firms in the United States and worldwide. In 2007, BPM worked with more than 60 other accounting firms worldwide to serve their clients.

From working with life sciences technology start-ups on intellectual property valuations to teaming with Fortune 500 companies or supporting the wind down of maturing businesses, BPM professionals are trusted advisers to CFOs, accounting departments and executives and help them realize their business objectives.

Other industries in which the firm regularly advises includes technology, real estate, construction, financial services, professional service firms, retail, wholesale, manufacturing and nonprofits.

### LEADERSHIP WITH VISION

The vision behind BPM's services and workplace culture is widely attributed to cofounders Steve Mayer, Henry Pilger and Curtis Burr, who enjoy a 30-year friendship.

Frustrated by the limitations of large mainstream accounting firms that they experienced while at Coopers & Lybrand, they joined forces in 1986 to service the emerging needs of Bay Area business.

Named one of the most admired CEOs by the San Francisco Business Times, Mayer, along with his partners, foster an entrepreneurial and enthusiastic atmosphere and are as committed to their employees as they are to clients.

Whether digging in for a professional "street fight" to prevent the bankruptcy of a major client or hosting a Giants baseball event raising \$100,000 to benefit a former employee's sick child, BPM does not conduct business in half measures.

Since the beginning, BPM has focused on delivering creative, proactive and cost-effective services to help clients achieve their financial and business goals. And one of the best ways to accomplish this is to create a work environment where employees are challenged and engaged, where they grow professionally and where they have a real work-life balance.

### BPM VALUES

Transparency, integrity and honesty are major tenets in BPM's management focus. The firm holds town-hall meetings where they open the agenda to all employees and readily field questions, even the tough ones.

To encourage the imagination and entrepreneurial talents of all employees, BPM staff members lead the firm's annual community service day, known as Because People Matter Day or BPM Day. Activities on BPM Days have ranged from painting, cleaning and maintenance to habitat restoration and building sets for a local community theater. Instead of throwing a party to mark a company anniversary, the firm took a strong role in the San Francisco Food Bank's campaign for a new warehouse and raised a total of \$250,000 on top of the firm's sweat equity in the project.

The commitment to giving back carries through the company. BPM partners are active leaders in professional organizations including the Californian Society of CPAs, American Institute of Certified Public Accountants (AICPA), San Francisco Chamber of Commerce and BayBio Partners and managers of BPM have served on more than 100 boards of business, community and professional organizations.

### BREAKING THE FINANCIAL CODE FOR THE FUTURE

Just as the financial codes and rules governing clients' businesses are constantly changing, so are the needs of a thriving workplace

"It's like painting the Golden Gate Bridge, the work is never done," remarks Mayer. BPM's future includes continued growth and a "block and tackle" strategy to remain relevant by remaining visionary and developing underserved niches needed by clients.

BPM was one of the first regional accounting firms to start a U.S. Securities and Exchange Commission (SEC) practice area. The firm's integrated wealth management and estate planning advisory services were also ahead of the curve. In staffing, once again the firm takes a personal and custom approach, carefully matching the right professionals with the needs of the client, while always keeping the value proposition in the forefront.

### ATTRACT, DEVELOP AND RETAIN

Looking ahead, Mayer views one of the greatest challenges to the accounting profession is in recruiting the next generation. Currently, the firm's stated business focus is to "Attract, Develop and Retain." Previous mandates have included "Good to Great," "Ring the Bay" and "Year of the Mergers." All of which have been realized and met with BPM's high standards.



Steve Mayer co-founder of BPM

Burr Pilger Mayer is optimistic in its ability to attract and retain the finest professionals to its firm. One internal step it has taken is introducing an employee stock ownership plan available to all employees, making it the first regional accounting firm in the U.S. to adopt an ESOP. Externally, there has been a recent rise in the number of college students enrolled in accounting courses, in part motivated by post-Sarbanes-Oxley Act demand. BPM has recently created an ambassador program at the 10 colleges where they recruit accounting students.

With its novel approaches, work-balance commitment and strong client service ethos, BPM is proving attractive to both the new breed of accounting professionals and business leaders of all generations.

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