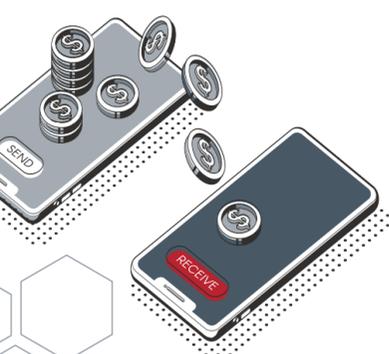


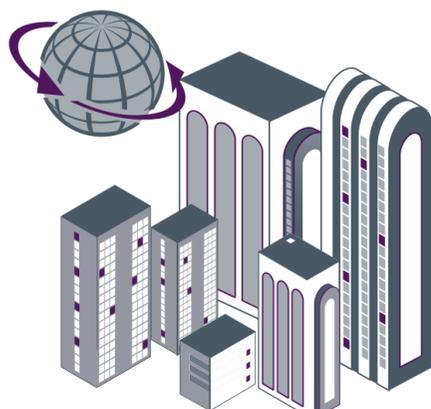
# Nine Ways BPM Can Take Your Family Office *Further, Faster*

It is time for technology to enable and empower family members with true transparency and data-driven decisions.



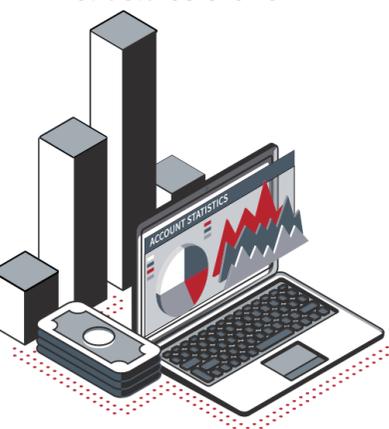
## 1 Fully Integrated, Mobile Cloud Platform

Building wealth is not a 9-to-5 job. From the office or the road, you need visibility and information that meets you where you are. At BPM, we empower you to build an integrated technology stack, with all your data and applications available 24/7/365, on a secure and mobile cloud platform.



## 2 Global, Multi-Entity Consolidation

Whether you manage a single family or multiple family offices around the world, our BPM team can consolidate all your entities, operations and financials into our integrated solution suite. We give you the flexibility and freedom to scale your technology as your needs or ownership structures evolve.

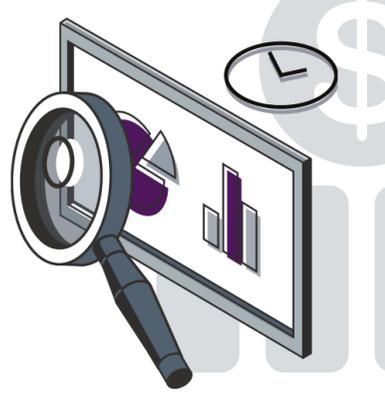


## 3 Proactive Tax Planning and Projections

The last thing your family wants is surprise tax liabilities that could cost millions of dollars. Eliminate the stress with visualized tax projection dashboards to track, plan and strategize by family office, by entity or by family member.

## 4 Powerful Reporting and Analytics

Transparency is critical for every family office, and nearly impossible to obtain with basic accounting software and spreadsheets. With our integrated technology platform, every family member knows exactly where they stand in real time. Helping families manage their wealth through data-driven decisions is as simple as clicking a button.

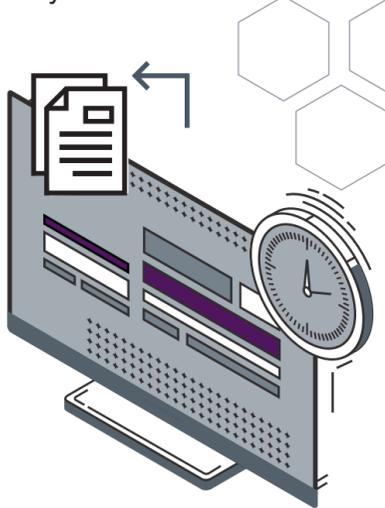


## 5 Virtual Bill Pay and Employee Reimbursement

Writing paper checks is time consuming and risky. At BPM, we can install several virtual bill payment options, such as Concur, Bill.com and Nexonia—leaders in the virtual bill payment space. These platforms allow for recurring bills, streamline approvals and automate electronic payments in the cloud, from any location or device. You can even pay household expenses with ease ensuring accuracy and transparency.

## 6 Paperless Document Management

If you want true transparency and traceability, documentation is mandatory. Ready to ditch the paper, but still secure your audit trail? Attach receipts on the fly. Upload contracts from the attorney's office. Get files to your tax preparer in a click. All your files are organized and accessible in the cloud.



## 7 Simplified Wealth Management

Do you wish you had an integrated technology platform to not only manage wealth and assets, but to help you maximize profit? Imagine consolidating your family's global portfolio in one spot. Analyze performance, allocate profit, identify trends, mitigate risk and provide rolled-up or drilled-down insight in seconds.

## 8 Customizable Security and Privacy Controls

High-net-worth individuals demand privacy, but you do not have to sacrifice security for accessibility. At BPM, our preferred third-party platforms allow you to establish strong governance and security controls for each user, whether they are staff members or family members, while providing easy access on a secure cloud platform.



## 9 In-House Human Resources and Payroll

A fully outsourced HR solution can streamline business functions and empower your workforce to manage their own needs. We work with you to align HR functions and business goals—setting the stage for sustainable growth. At BPM, we partner with several payroll providers and can help you manage HR and payroll needs within your family office.

**sage** Intacct

Sage Intacct is the first and only preferred financial services accounting software of the AICPA. BPM is recognized as the top Sage Intacct partner for Family Offices.

## Why Family Offices Trust BPM

Family Offices want maximum returns from their technology investments, and our BPM team supports their goals. Our professionals work extensively with the high-net-worth community, from our technology solutions to our financial and tax services, to add value from day one. As the top Sage Intacct Partner for Family Offices, you can depend on us to build a technology platform designed to help you automate processes and minimize risk.

**We are here to help.**

**Contact Us:**

**Britiany Tompkins | Director, Advisory**

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**BPM**

Learn more at [bpmcpa.com](http://bpmcpa.com)