



Financial Services

Overview

The financial services sector is facing a rapid increase in scrutiny and more risks than ever before. With transparency in the forefront of investors' minds and the critical eye of the public focused on compliance and accountability, it is vital to choose an accounting firm that understands your business inside and out.

Since BPM was founded in 1986 and served its first audit client, a local financial services firm, we've grown to become the largest California-based CPA firm. With full-service capabilities, we possess in-depth knowledge of the financial services industry - its key processes, challenges surrounding growth and performance, regulatory compliance and governance, and the many other complex accounting and reporting issues it faces.

We offer more than just deep industry knowledge. By maintaining a devotion to our core services, we employ a multidisciplinary approach tailored to your every need, as well as responsiveness that is unmatched in order to maximize efficiency. Our group's commitment to client service is world-class. We ensure that your assigned team is accessible and well versed in innovative solutions. In short, we value our financial services clients and view it as a privilege to serve the sector.

We proudly serve:

- Broker Dealers
- Registered Investment Advisors
- Venture Capital
- Mortgage Bankers
- Investment Banks
- Insurance Brokerage
- Asset Managers
- Community Banks
- Private Equity Funds
- Peer-to-Peer Lending
- Hedge Funds
- Alternative Lenders
- FinTech
- Blockchain and Digital Assets

Contact a BPM financial expert today to see how we can take your financials to the next level.

Contact

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