

Associations

Overview

Associations provide an invaluable service to its members on topics relevant to their profession or industry. These include educational sessions in topical issues as well as tracking legislative, regulatory, and judicial activity that may impact member operations.

BPM serves associations ranging from professional and industry associations to alumni associations to recreational associations. Our clients include well-established associations which have served their members for over 100 years, providing ongoing support and networks for their benefit. BPM has provided various services to associations, including:

- Financial statement audit
- Tax compliance, planning, and transaction structuring
- Pension audit
- Pension advisory services
- Internal control accounting
- Information technology assistance
- Unrelated business income tax issues
- Royalty income and mailing list activities
- Payroll tax issues assistance
- Combination and consolidation of various associations' memberships
- Uncertain tax position analysis

As part of BPM's service to the community, nonprofit organizations, and associations, we continue to educate ourselves and clients through our Nonprofit Education Series. With the wide range of services and types of associations we serve, we are able to provide our clients with in-depth knowledge of issues facing nonprofit associations.

Tax Expertise for Trade Associations

Many tax issues trade associations face such as unrelated business income, private inurement, and foreign activity disclosures are common to all nonprofit organizations. However, reporting of lobbying and political activities, the application of proxy tax rules, and its effect on membership dues notices are unique to trade associations and require specific knowledge and experience.

Many trade associations are structured to have related corporations, public charities, and political action committees. Such structures require careful, proactive, and sophisticated tax planning in order to preserve exempt status, maximize the effectiveness of the organization's operations, and accomplish its goals.

BPM's tax group has extensive experience with all types of tax issues. Leaders of our tax practice have over 30 years of combined experience serving national and international trade associations based in Washington, DC and the San Francisco Bay Area.

Contact

Daniel Figueredo, CPA, CGMA
Partner, Assurance
415-288-6284
DFigueredo@bpmcpa.com