

# Andrea Cope, CPA

## Of Counsel, Advisory

**Walnut Creek**  
2001 North Main Street, Suite 360  
Walnut Creek, California 94596



## Overview

Andrea is part of BPM's growing Family Office team, where she uses her 30+ years of experience to build strong client relationships and team resources. She works closely with both staff and leadership to onboard new clients, manage client expectations as well as manage and grow the current and future client base.

As a past BPM Partner, she provided accounting, tax and financial management services to high-net-worth individuals, businesses and their owners in the real estate, nonprofit, hospitality and professional services industries. Her experience included assisting startups and owner-managed businesses with outsourced accounting services, general business consulting, tax planning, and CFO services.

Today, she continues to work with high-net-worth individuals by establishing and maintaining the many inner workings of a Family Office. She has worked with one family for the last 11 years to help with everything from paying bills, buying houses/cars/art, setting up new entities and establishing household payroll. She meets frequently with other advisors that support her families, and assists with financial reporting and cash management along with risk management and estate planning.

Andrea also has experience working with a family to establish a private foundation. She worked with attorneys to set the entity up correctly, implemented an accounting system and bill paying platform, managed the accounts payable process and created quarterly reports and tax plans for minimum distributions to remain a private foundation. She also worked closely with BPM tax professionals to prepare the necessary financial statements used for the tax preparation, as well as worked with the outside auditors on the annual audit process.

Andrea G. Cope holds an active CPA license in California.

## Interesting Tidbit

Andrea is a trained chef and loves to share recipes, food ideas and wine pairing suggestions.

## Engagements

AICPA G400 Conference on Women in Leadership, 2012

## Certifications

- Certified Public Accountant (CPA)

## Services

Family Office Services  
Private Client Services

## Industries

Nonprofit  
Real Estate

## Education

AOS/Culinary Arts – California Culinary Academy  
BS/Business Administration – California State University, Sacramento



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- Chartered Global Management Accountant (CGMA)

### **Awards**

Most Influential Women in Business – San Francisco Business Times (2009 and 2010)

### **News & Events**

BPM Joins Family Office Exchange's Integrated Wealth Advisor Council 09.23.20

How New San Francisco Ordinances May Lower Business Costs 09.16.20