

# Caroline McDonald, CPA

**Manager, Advisory**

408-961-6337  
CMcDonald@bpmcpa.com

**San Jose**

10 Almaden Boulevard, Suite 1000  
San Jose, California 95113

**Overview**

Caroline has 10 years of accounting experience in the Bay Area and is a Manager in BPM's San Jose office. She is a member of the Business Enterprise Services Team (BEST), where she helps a wide range of clients, primarily nonprofits.

Before BPM, she worked in tax planning and compliance for six years, primarily working with nonprofit and private company clients. Caroline has worked at a large nonprofit for three years, overseeing the treasury, risk management and tax functions.

Today, she helps build accounting processes and procedures for clients and helps ensure they maintain efficiency and compliance.

Caroline typically helps clients with their day-to-day back office accounting, audit readiness or with the implementation of technology solutions.

Recently, she helped a growing nonprofit implement new accounting software and cleanup past accounting records to give the organization better visibility and control over financial reporting.

Caroline also commonly assists startup companies by providing tax-basis and GAAP-basis financials. Her efforts has helped an organization obtain major government loan financing, in the past.

She takes pride in her ability to form close relationships with clients and to become a trusted advisor with the answers to almost any accounting and finance-related questions. Her diverse accounting background has sharpened her technical experience and taught her to be a great business advisor.

Caroline McDonald holds an active CPA license in California.

**Interesting Tidbit**

In addition to accounting, Caroline also studied music. The summer after college, she sang in an opera training program that toured small towns in Austria.

**Community**

- Member – American Institute of Certified Public Accountants (AICPA)
- Former Director – CalCPA, Peninsula Silicon Valley Chapter

**Certifications****Services**

Business Process Outsourcing  
Reviews & Compilations  
Technology Solutions

**Industries**

Nonprofit  
Technology

**Education**

BS/Commerce, Accounting – Santa Clara University



---

Certified Professional Accountant (CPA)