

Jim Wallace, CPA

Chief Executive Officer

San Francisco
600 California Street, Suite 600
San Francisco, California 94108



Overview

With over 35 years of public accounting experience, Jim is BPM's Chief Executive Officer and serves on the Firm's Board of Directors and Management Committee. During his tenure, he helped lead the Firm through the expansion of service lines, multiple business combinations, as well as significant organic growth. Prior to joining BPM, Jim was the Chief Operating Officer at Rehmann, where he served in a similar role.

As CEO of BPM, Jim focuses his attention on leading strategic initiatives that raise the Firm's national prominence through its expansion into new markets, concentration on specialty services and business combinations in key markets. Through his leadership and commitment to "Because People Matter," the Firm continues to be recognized as a Best Place to Work and serve clients.

In addition to his executive role, Jim also leads the Firm's *Inclusion Now!* Committee, a BPM program focused on opportunities that enhance gender and minority diversity in leadership roles within the Firm and profession. Jim also serves on the AICPA Woman's Initiative Executive Committee (WIEC), whose mission is to promote and support the success of women for the broader purpose of sustaining the profession by creating an inclusive environment, increasing talent engagement and leadership opportunities for women.

He serves on the Board of Directors of the Bay Area Council, Allinial Global Americas Region Board of Directors, Golden Gate University Board of Trustees and the Ageno School of Business Advisory Board. In addition, Jim will join the AICPA Council in 2021.

Recognized within the community for his effective leadership and business acumen, Jim is often asked to speak on various topics, including diversity inclusion and belonging, gender equity, success-based leadership and innovation.

Jim Wallace holds an active CPA license in California and Michigan.

Interesting Tidbit

Outside of his role as CEO, Jim likes spending time with his family, working in the garden, renovating his old house and taking road trips in the family's RV.

Community

- Executive Committee Member — AICPA Women's Initiatives Executive Committee

Education

BS/Business Administration
and Accounting — Aquinas College

- Board Member — Allinial Global Americas Region
- Board Member — Bay Area Council
- Board Member — Golden Gate University Board of Trustees
- Board Member — The Ageno School of Business Advisory Board
- Member — American Institute of Certified Public Accountants (AICPA)
- Member — California Society of Certified Public Accountants (CalCPA)
- Member — Michigan Association of Certified Public Accountants
- Incoming Member — AICPA Counsel
- Member — San Francisco Business Times Leadership Trust
- Former Co-Chair and Member — Saginaw Chamber of Commerce Leadership Diversity Committee
- Former Board Member — Catholic Diocese of Saginaw
- Former Board Member and Chair — Saginaw Area Catholic Schools
- Former Board Member and President — Nouvel Catholic High School

News & Events

BPM COO Scharrell Jackson Presents: Putting People First Because People Matter 03.18.21

BPM Wins 2021 “Best of Accounting™” Award for Client Service Excellence
Top 50 Firm Recognized for Sixth Year, Based on Client Reviews 02.05.21

BPM Leadership Discusses Diversity and Belonging Best Practices
How Accounting Leaders Can Start Acting on DEI Initiatives 02.03.21

Jim Wallace Discusses California’s Business Exodus
BPM CEO Quoted in the Silicon Valley Business Journal 02.01.21

BPM Named a 2021 “Best Tax and Accounting Firms” by Forbes
Client feedback fortified the Firm’s ranking for the second consecutive year 12.01.20

INSIDE Public Accounting Writes About BPM’s New Office 11.05.20

BPM Expands Into Los Angeles County, Combines With Rossi LLP
Combination Brings Innovative Specialty Services to LA Marketplace 10.29.20

BPM Expands Technology Solutions Practice
Top-50 Firm Combines with Caravel Partners 10.01.20

Who’s to Blame for the State’s Fiscal Woes?
Jim Wallace Quoted in the San Francisco Business Times 09.21.20

INSIDE Public Accounting Recognizes BPM Expansion in SoCal 08.12.20

BPM’s Jim Wallace Nationally Recognized as a “Managing Partner Elite”
Accounting Today Highlights Leaders Driving Change in 2020 08.10.20

BPM Named to INSIDE Public Accounting’s “Top 100 Firms” List
Year-over-year growth drives Firm to #48 and expands client resources and reach 08.10.20

BPM Expands in SoCal: Announces Strategic Combination with WMM CPAs 07.23.20

Diversity, Inclusion, and Belonging – A BPM-Led Discussion 07.10.20

BPM Named One of the Best Places to Work in the Bay Area

The Accounting Firm's Values and Benefits Encouraged Employee-Backed Nomination 04.24.20

People-Focus Drives BPM's Rapid Rise in "Accounting 50"
Efforts Lead to Increased Vault Rankings and Leadership Through Pandemic 04.23.20

BPM Named as West Coast Regional Leader Thanks to Growing Client Services
Accounting Today also acknowledged BPM as one of the fastest growing U.S. Firms 04.15.20

BPM Ranks as Largest Non-Big 4 Accounting Firm in the Greater Bay Area 03.02.20

BPM Offers Clients Wider Variety of Specialty Services in 2020
Firm Wins "Best of Accounting Diamond Award" for Client Service Excellence 02.04.20

BPM's Jim Wallace Commits to CEO Action for Diversity & Inclusion™
It's the largest CEO-driven business commitment to advance diversity and inclusion within the workplace 11.05.19

BPM's Jim Wallace Shares Career Advice in the San Francisco Business Times 09.16.19

BPM's Jim Wallace Joins San Francisco Business Times Leadership Trust 08.28.19

CPA Consulting Combines with BPM to Expand Firm's Presence in Seattle 08.14.19

BPM CEO Jim Wallace on Life In Accounting, the Where Accountants Go Podcast 07.16.19

BPM's Jim Wallace Quoted in the Journal of Accountancy About Advocacy 07.01.19

BPM Recognized as 2019 Bay Area Best Places to Work
Top Bay Area Accounting Firm Receives Award for the Fifth Consecutive Year 03.19.19

BPM Ranked Top 5 Accounting Firm in the Bay Area
The Firm Attributes High Standing to its Strategic Growth 02.28.19

BPM Accepts "Best of Accounting" Award for Client Service Excellence
Top-50 Accounting Firm Wins Award for the Fourth Consecutive Year 02.11.19

Leaving Town, but Keeping the Job: How Bay Area Companies Are Tackling the Rise of Remote Workers 01.10.19

Croce & Company Combines with BPM
Top-50 firm expands presence in Central Valley 01.02.19

Options4Growth's HR Consulting Practice Joins BPM 12.14.18

BPM CEO Looks for Growth Through Acquisition 11.12.18

San Francisco Business Times Honors BPM's Jim Wallace as 2018 Most Admired CEO
Bay Area executive celebrated for leading change in the accounting profession 10.29.18

BPM Wins 2018 LEA EDGE Award for Innovative Firm of the Year
Top-50 firm acknowledged for leading change in the accounting profession 10.23.18

Kramer & Olsen Accountancy joins BPM LLP 09.13.18

S.F. accounting firm expands into Southern California with latest deal 09.13.18

BPM welcomes Jonathan Fayman to Corporate Services Team 09.06.18

BPM Named a Best of Accounting™ Award Winner for Client Service Excellence for Third Consecutive Year 03.08.18

Jim Wallace Appointed to AICPA Women's Initiatives Executive Committee 12.19.17



Jim Wallace Invited to 2017 Braden Business Leadership Speaker Series 11.21.17

Getting ready to move forward: BPM's Jim Wallace on accounting innovation and expansion 08.31.17

Breach blockers 08.20.17

INSIDE Public Accounting: Succession Planning for CFO, COO and Other Operations Executives Critical to Success 07.14.17

Jim Wallace Participates in the MGF Meeting of the AICPA Top 100 Firms 07.14.17

Public Accounting Report – B(u)y the Book: Firm Leaders Share Their Reading Recommendations 06.30.17

BPM Recognized as 2017 Bay Area Best Places to Work 03.20.17

BPM Recognized as “Best of Accounting” Winner for Client Service Excellence 01.17.17

BPM Receives FedRAMP 3PAO Accreditation 08.24.16

Building Gender Equity in the Workplace: A Best Practices Resource Guide 07.29.16

BPM Marks 30th Anniversary 06.22.16

BPM Named Best Public Accounting Firm for Women Second Year in a Row 06.08.16

Public Accounting Report - Escalating Market Expectations Transform Business Case for Advancing Women 05.23.16

2016 Bay Area Council Outlook Conference 05.17.16

BPM Names James Wallace as Next CEO 06.19.15