

Michelle Ausburn, CPA

Partner, Assurance

Craft Beverage Industry Group
Leader

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**Overview**

Michelle is a Partner in Assurance and Craft Beverage Industry Group Leader at BPM. Her area of expertise is GAAP compliant financial accounting and reporting. She serves middle-market, privately-held, family owner-managed, and institutionally owned businesses and publicly held companies. She has experience working with companies in the start-up phase through ownership transition, including IPO. She spends the majority of her time working with wineries, vineyards, real estate entities, négociants, custom crush facilities, wine and spirits distribution companies, natural and organic food companies, and non-wine agriculture. As a result, she has extensive knowledge of the more common and complex accounting issues those types of businesses face. In addition to providing traditional audit and review services, she offers guidance in the areas of business combinations, consolidations, lease accounting, inventory valuation, revenue recognition, and evaluation of internal control. Michelle also oversees employee benefit plan audits.

Michelle has served on several boards including as Treasurer for the Napa/Sonoma Chapter for Women for WineSense (2011-2013) and Treasurer and Finance Committee Chair for The Healdsburg School (2013-2015). Since 2009, she has served on the planning committee for the Cal CPA Wine Industry Conference where she has also presented on GAAP accounting and reporting in the wine industry. Michelle has also participated as a speaker at the Wine Industry Technology Symposium and through Sonoma State University's Wine Business Program.

She is active in the Firm's recruiting efforts at SSU and leads the Firm's WIN! Initiative – a program dedicated to creating opportunities that improve women leadership participation from its current level to a level that is more reflective of women in the workforce.

Michelle Ausburn holds an active CPA license in California.

Interesting Tidbit

Michelle is a 5th generation Californian. She was born and raised in the agricultural community of California's Central Coast where her great-grandparents were cattle ranchers.

Community

- Member — American Institute of Certified Public Accountants (AICPA)
- Member — California Society of Certified Public Accountants (CalCPA)
- Board Member — North Bay Leadership Council
- Treasurer — Russian River Valley Winegrowers

Services

Employee Benefit Plan Audit

Industries

Agribusiness
Automotive
Wine / Craft Beverage

Education

BS/Economics and Business
Administration — Saint Mary's College
of California

- Board Member — Volunteer Center of Sonoma County

Certifications

Certified Public Accountant (CPA)

News & Events

Financial Advice for Wine Growers During the Pandemic

BPM's Michelle Ausburn Explains in The SOMM Journal 08.17.20

Michelle Ausburn Provides Top COVID-19 Accounting Tips for Wineries 07.06.20

BPM Named "Best CPA Firm for Women" in 2020

BPM Commitment to Female Leadership Recognized for Sixth Consecutive Year 06.09.20

RMDs and "Lost" Participants: Steps to Comply with Your Fiduciary Duty 01.07.20

How Plan Eligibility Can Help Achieve Recruitment Goals 01.07.20

Plan Advisor Fiduciary Category Status: It's More Than Numbers 01.07.20

Should Your 401(k) Vest Now or Later? 01.07.20

Employee Benefits Update Year End 2019 01.07.20

New Exempt Status Income Threshold could Impact 401(k) Plan Costs 10.04.19

Employee Benefits Update October/November 2019 09.20.19

Will a Merger or Acquisition Upend Your 401(k) Plan?

Beware of ERISA entanglements and higher costs 09.20.19

IRS Liberalizes Availability of Self-Correction Program for Plan "Failures" 09.20.19

Warn Participants of the Risks of Front-Loaded Deferrals 09.20.19

DB Plan De-Risking Strategies in Full Swing 08.26.19

Time for Class: Widening the Scope of Training for Retirement Plan Committee Members 08.26.19

Make Your SPDs User-Friendly 08.26.19

Employee Benefits Update August/September 2019 08.26.19

BPM Named "Best CPA Firm for Women" for Fifth Consecutive Year 06.10.19

Help Retirees Plan Their Retirement Spending, Survey Says 06.01.19

ERISA Disclosure 101: A Quick Overview of Plan Sponsor Obligations 06.01.19

Not Every Pension Plan That Benefits Retirees Is an ERISA Plan 06.01.19

Appeals Court Sacks NFL Players Ex-Spouse's Attempt for QDRO 06.01.19

Employee Benefits Update June/July 2019 06.01.19

BPM Partner Inna Merzheritsky Named a Most Influential Woman in Bay Area Business

The San Francisco Business Times Annually Recognizes Prominent Female Leaders 05.21.19

BPM's Alan Alvarez Recognized as "Forty Under 40" Winner

The North Bay Business Journal Distinguishes Young Business Leaders Annually 04.11.19

Proposed IRS Regs Liberalize Rules for Hardship Withdrawals 04.08.19

First Circuit Shifts Burden of Defending a Fiduciary Breach Claim 04.08.19

Have You Outgrown the Need for Matching 401(K) Contributions? 04.08.19

Take a Close Look at Your Plan Expense Categories 04.08.19

Employee Benefits Update Newsletter: April/May 2019 04.08.19

IRS OKs Student Loan Debt Reduction Program Linked to 401(k)s 02.01.19

Failing to Enroll Eligible Employees in Your Plan 02.01.19

Are You Ready for VCP Electronic Filing? 02.01.19

Women in Corporate Leadership to Take More Than New California Law, North Bay Professionals Say 01.18.19

It May Be Time to Offer a Self-Directed Brokerage Account Option 11.27.18

Is There a “MEP” in Your Future?
Streamlined Retirement Plan Model Under Review 11.27.18

Not Planning for Early Retirement Threatens Employees’ Financial Security 11.27.18

What to Do If You Inadvertently Blow Through 415(C) Limits 11.27.18

Michelle Ausburn Featured in KRON4 Salutes Women Business Leaders 10.16.18

Why Target Date Fund Oversight Matters 10.09.18

Investment Option Overload? A Cautionary Tale From Yale University 10.09.18

Investing in HSAs for Long-Term Retirement Goals 10.09.18

Charging plan expenses to participants correctly 08.20.18

Keep your eye on the ball
Plan forfeitures must match plan document 08.20.18

New rules affect disability benefit claim denials in retirement plans 08.20.18

Do you know what to do with an SOC report? 08.20.18

Using Targeted Education to Narrow the Gender Gap in Retirement Savings 6.18.18

Is Your Retirement Plan Successful? Which Criteria Tell The Real Story 06.18.18

Plan Documents: Be Proactive to Defuse Possible Landmines 06.18.18

Stem Plan Leakage by Upgrading Your 401(k) Loan Rules and Practices 06.18.18

BPM LLP Named as One of the Best CPA Firms for Women and Leadership Equity
2018 Accounting MOVE Project Report Outlines New Modes of Investing in Women and Defining Success – BPM Recognized for
Fourth Consecutive Year 06.12.18

Tax Cuts and Jobs Act Gives — and Takes Away 04.18.18

Cash Balance Plans Growing at a Double-Digit Clip 04.18.18

DOL Increases Scrutiny of Defined Benefit Plans 04.18.18

Interpretation or Statutory Violation? Why it Matters When Deciding Remedies 04.18.18

Employee Benefits Update Newsletter: April/May 2018 04.01.18

Identity Theft Threat Puts Plan Participants and Sponsors at Risk 02.08.18

Fiduciary Rule's Tortured Path to Implementation: What This Means for Plan Sponsors 02.08.18

Employee Benefits Update Newsletter: February/March 2018 02.08.18

Tax Cut Law a Mixed Bag for Retirement Plan Sponsors 01.16.18

Deciding What to Do with Orphaned 401(k) Plan Accounts 12.05.17

How High Can You Go? - Participants willing to accept higher default deferral rates 12.05.17

Reimbursement Road Map for Sponsor Services 12.05.17

Why Adding a Roth 401(k) Option Could Boost Employee Savings 12.05.17

Employee Benefits Update Newsletter: Year End 2017 Issue 12.05.17

Meet 9 leaders in North Bay accounting
North Bay Business Journal 11.17.17

Staging a Comeback – Stable Value Funds Are Back In the Spotlight 10.20.17

Are You Going To File Form 5500 On Time? Play It Safe And Avoid Penalties 10.20.17

GAO Report: Some Plan Designs May Reduce Retirement Savings 10.20.17

Target Date Fund Labels Can Obscure Their Investment Strategy 10.20.17

Voluntary Correction Program: How to Correct 401(k) Plan Loan "Failures" 08.24.17

Making Age a Factor in Choosing QDIA Options 08.24.17

Active vs. Passive Investment Funds: Should You Let Participants Decide? 08.24.17

Consider Your Options with Nonvested Participant Forfeitures 08.24.17

Wine Business Monthly's Budgeting Issue - August 2017 08.07.17

Is a Safe Harbor Plan the Right Move? 06.08.17

Avoid Litigation with Attention to Common Red Flags 06.08.17

Helping Soon-to-Be Retirees Understand RMD Rules 06.08.17

IRS Simplifies Process for Avoiding Rollover Penalties 06.08.17

BPM Named Best Public Accounting Firm for Women and Best Firm for Leadership Equity for Third Consecutive Year 06.06.17

Be Prepared for your Next — or First — QDRO 03.31.17

When is it Best to Claim Social Security? Online "claiming strategy" tools to help your employees 03.31.17



The Uncertain Future of Form 5500: Will compliance burden increase? 03.31.17

Understanding IRS Determination Letter Program Changes: How changes affect individually designed retirement plans 03.31.17

Rule Changes Bring Big Shift in Wine Lease Accounting 04.25.16

Professionals on the Move – December 28, 2015 12.28.15

People News – Dec. 4, 2015 12.04.15

Ausburn Becomes Partner at BPM 12.01.15

BPM Announces Five New Partner Promotions for 2016 11.30.15