



2023 BDO ALLIANCE USA WORKING WITH CPA FIRMS FOR CLIENT SERVICE

March | 2023

BDO USA, LLP, a Delaware limited liability partnership, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.



WORKING WITH ACCOUNTANTS

The BDO Alliance is a group of Accounting and Consulting firms - but not what you would expect!

<https://www.youtube.com/watch?v=LqQlCOmXuHM>

WHAT IS BDO?

▶ **Since 1963...**

BDO (Binder Dijker Otte) has been providing public accounting, tax, consulting and business advisory services through its firms across the globe

▶ **Today...**

we are the 5th largest accounting network in the world covering 167 countries, and the 6th largest accounting firm in the US.

We pride ourselves on our exceptional client service delivery, particularly in the following areas:

CLIENT NEEDS:

We anticipate our clients' needs and are forthright in our views, in order to ensure the best outcome

COMMUNICATION:

We are always clear, open & swift in our communication

COMMITMENT:

We agree to and meet our commitments, meaning that we deliver what we promise, every day, for every client

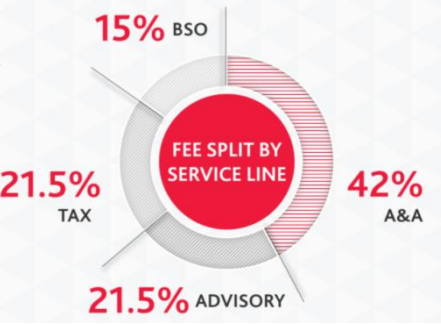
PEOPLE:

At BDO we are proud to provide the right environment for our people to grow and develop - but also the right people to deliver for our clients

VALUE:

Our experts focus on creating value: we give our clients up to date ideas and valuable insights and advice that they can trust

BDO GLOBAL



BDO USA - BY THE NUMBERS



BDO USA, LLP

\$2.49 billion Revenues

38% Assurance **35%** Tax **27%** Advisory and Other

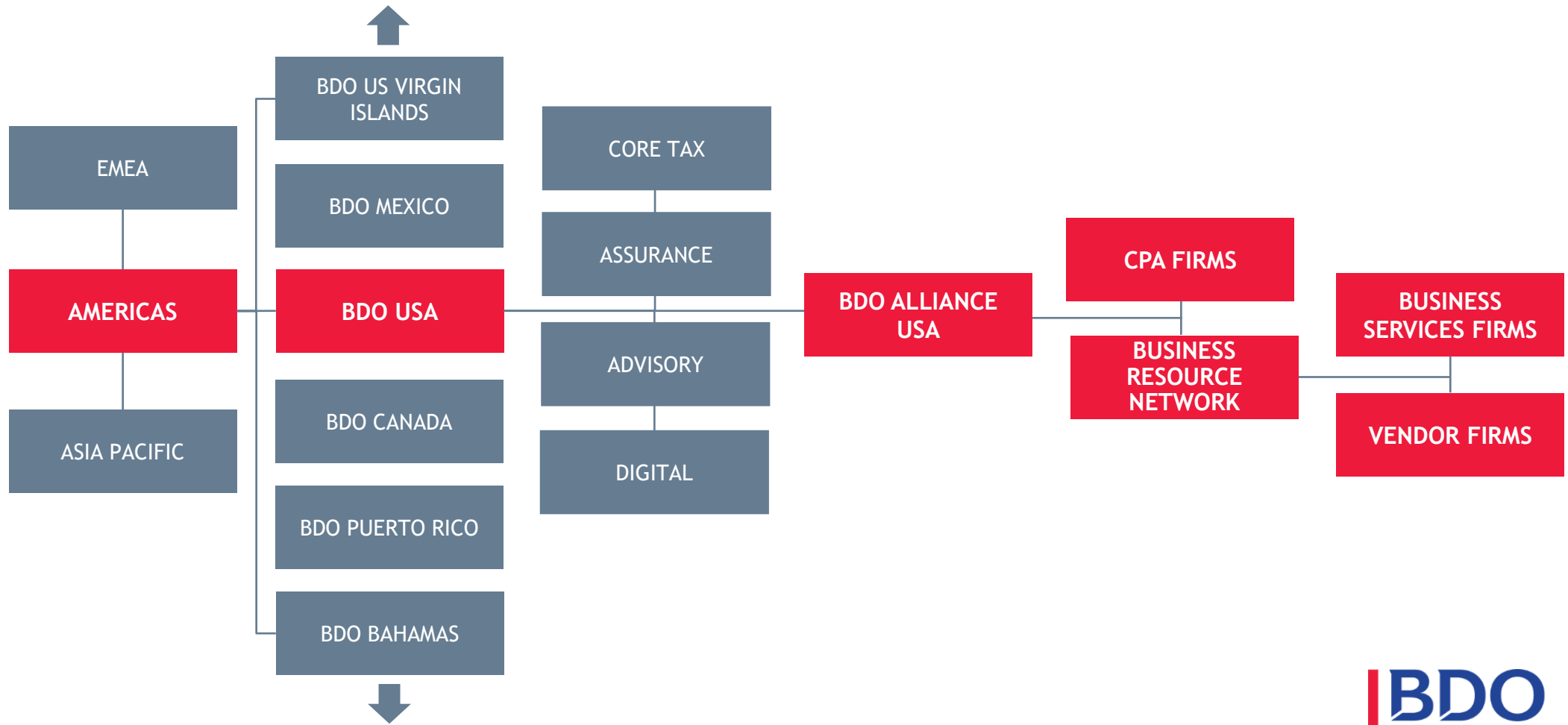
820 Partners **9,671** Client Service Personnel **80+** Offices
11,270 Total Personnel



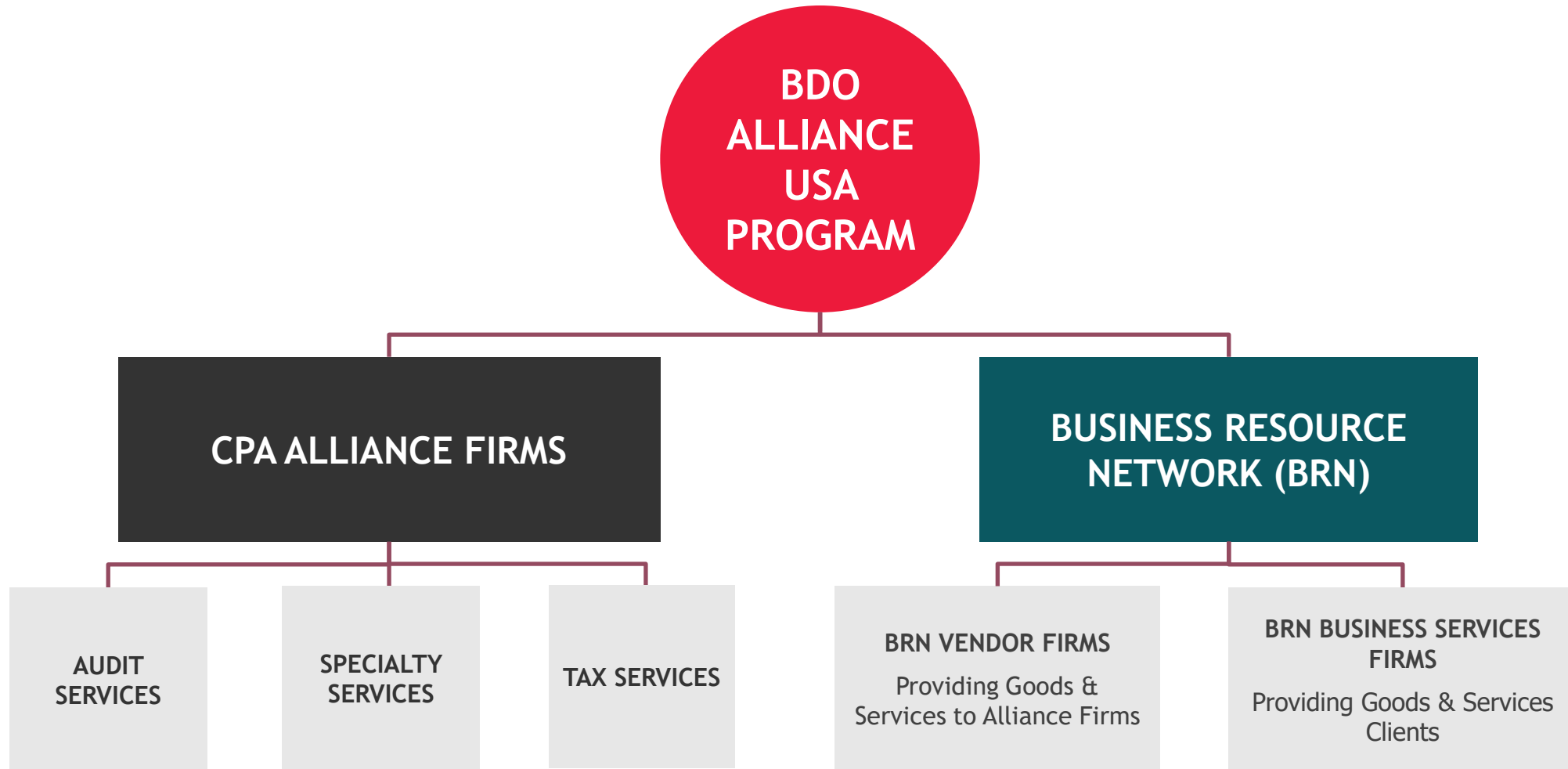
<https://www.bdo.com/>



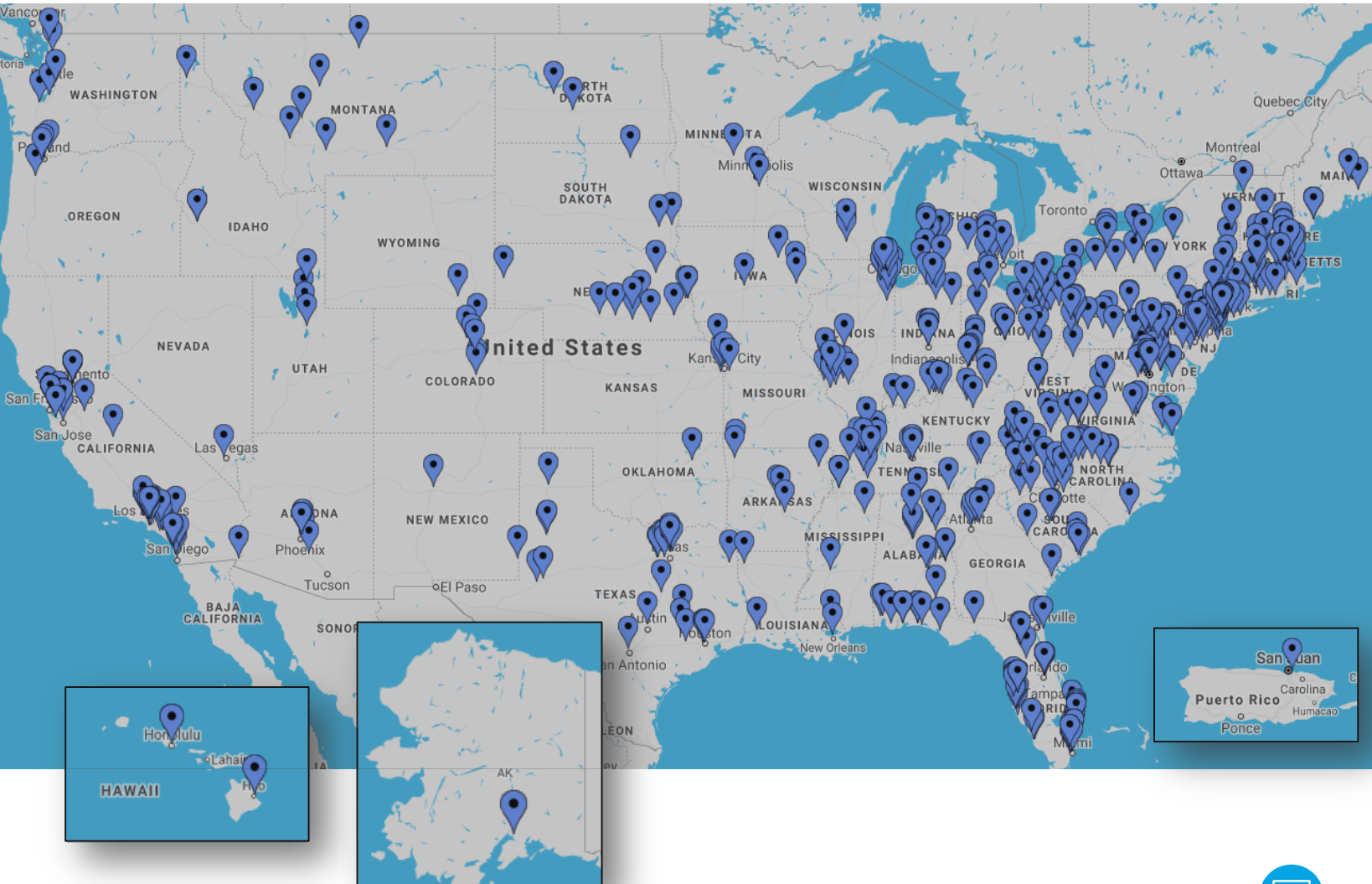
THE STRUCTURE OF BDO



STRUCTURE OF THE BDO ALLIANCE USA PROGRAM



THE STRENGTH OF OUR ALLIANCE FIRMS



BDO ALLIANCE USA

\$3.34 billion
Revenues

64% CPA Firms 36% BRN Firms

381 FIRMS **20,013**
Partners & Employees

850+ Independent Alliance Firm Locations Nationwide



EXPANDING YOUR ACCESS TO TAX SERVICES

International Tax

- Financing
- Restructuring
- Foreign Tax Credit
- Repatriation for Foreign Subs
- Int'l Hold Co. Structures
- Foreign Losses

State & Local Tax

- Property Taxation
- Corporate & Federal Tax
- Abandoned & Unclaimed Property
- Sales & Use Tax Advocacy and Consulting
- Income & Franchise Tax
- Credits & Incentives

Comp & Benefits

- ERISA Audits
- Golden Parachutes
- Employee Stock Ownership Plans
- Sales Force Comp
- Deferred Comp Plans
- Executive Compensation
- IRC§409 Compliance

Accounting Methods

- Defer Revenue
- Accelerate Deductions
- Optimal Methods/ Exposure Identification
- Corporate Estimated Tax
- Section 199 Deduction
- Transaction Cost Analysis

R&D Tax Credits

- Federal & State
- Non-U.S. Benefits
- Support Credits on Exam

Transfer Pricing

- Audit Defense Support
- Intercompany Agreements
- Cost-Sharing Arrangements
- Management Letters
- Benchmarking Services
- APAS

Expatriate Services

- US Tax Compliance
- Mobility Management
- Program Administration
- Tax Equalization
- Payroll Consulting
- Coordinate Foreign Tax Compliance

National Tax Office

- Corporate
- Subchapter S
- Partnership
- International
- SALT
- Tax Controversy

Other

- Private Client Services
- ASC 740
- Non Profit Tax
- Tax Analytics & Automation
- Tax Technology
- Tax Transaction Advisory Services



**A complete list of
BDO Tax Services
can be found at
bdo.com/services/tax**

SPECIALIZED ADVISORY SERVICES




www.bdo.com/services/business-financial-advisory



KEY BRN SOLUTIONS FOR CLIENTS

COST SAVINGS	TECHNOLOGY	SHARED SERVICES	CONSULTING/ RISK MANAGEMENT	PROPERTY/ FACILITY SOLUTIONS	INTERNATIONAL BUSINESS
<ul style="list-style-type: none"> ▶ Foreign Exchange ▶ Merchant Services ▶ Tax Credits ▶ Technology ▶ Telecommunications ▶ Transport and Shipping 	<ul style="list-style-type: none"> ▶ Business Technology & Analytics ▶ Cloud Services ▶ CRM ▶ Custom Development ▶ ERP ▶ Financial Systems ▶ Information Security ▶ Network and Infrastructure Support ▶ Systems Integration ▶ Web Solutions 	<ul style="list-style-type: none"> ▶ Foreign Exchange Management ▶ Human Resources, Benefits & Payroll ▶ IT Outsourcing/Hosting ▶ Marketing Services ▶ Merchant Services ▶ Payables Management ▶ Receivables Management ▶ Sales/Lead Generation ▶ Shipping & Logistics ▶ Surveys and Market Analysis ▶ Training and Development ▶ Virtual Call Support 	<ul style="list-style-type: none"> ▶ Actuarial Services ▶ Business Strategy Consulting ▶ C-Suite Services ▶ Change Management ▶ Industry Specific Services ▶ Risk Management Services ▶ Security Consulting ▶ Specialty Insurance ▶ Supply Chain Consulting 	<ul style="list-style-type: none"> ▶ Cost Segregation ▶ Green Energy Services ▶ Operational Improvement ▶ Property Taxes ▶ Real Estate Credits and Incentives 	<ul style="list-style-type: none"> ▶ Foreign Exchange Management and Hedging ▶ International Operations Start-up and Expansion ▶ International PEO ▶ Outsourcing

<https://alliance.bdo.com/document/brn-matrix> 



BRN BUSINESS & VENDOR SERVICES PROGRAMS

BUSINESS SERVICES (CLIENT FOCUSED)	SERVICES OFFERED	MAIN OFFICE
Altera Information Technology Solutions	Network, infrastructure and software solutions	Birmingham, AL
ARC-Average, Inc.*	Accounts receivable management and commercial debt collection & financing services	Buffalo, NY
Abacus Security	Information security consulting services	San Jose, CA
Availco Leasing Partners, LLC (ALP)	Capital security, equipment and intelligent automation solutions for 3M companies through enterprise entities	Camden, NJ
Actuarial Risk Management, LTD	Actuarial and risk management consulting services	Austin, TX
ADP*	Human capital management including payroll processing, payroll tax and compliance, HR services and HR management	Roseland, NJ
AFS Logistics LLC	Transportation and logistics expense reduction and management	Hilland, OH
Advanced Cumberland Technology Services	Technology, hosting and ERP systems implementation	Haines, MT
AKS Technologies	Computer network, infrastructure services, disaster recovery	Jackson, TN
Autosys CRM	CRM consulting and system operations related to business growth	Fort Lauderdale, FL
Bergantini Technology & Consulting	IT consulting services, network infrastructure and implementation of ERP and other software solutions (SAP/Oracle)	Bloomington, MN
CentraTel	Information security consulting services to nonprofit organizations	Staten Island, NY
CFR Insurance Co.	Expert financial, classification, construction and civil engineering	South Ogden, UT
ClearPath	Solutions for professional services organizations to measure and improve their client experience	Portland, OR
Cooper Holdings, Inc.	Specialized insurance products to hospitality, restaurant, microbusiness, franchise and specialty-related companies	Birmingham, AL
CRK Results, Inc.	Internal audit, compliance, CFO support around audit readiness and valuation	San Francisco, CA
Customer Associates LLC	Microsoft Dynamics ERP and CRM and Acumatica Cloud ERP	St. Petersburg, FL
Clouds Technology	Security consulting & PCI compliance services	Richfield, TN
CRM&P LLC	Technology and implementation, ERP software Oracle and SAP and specialty IT staff	Orlando, FL

*Also provides vendor services.

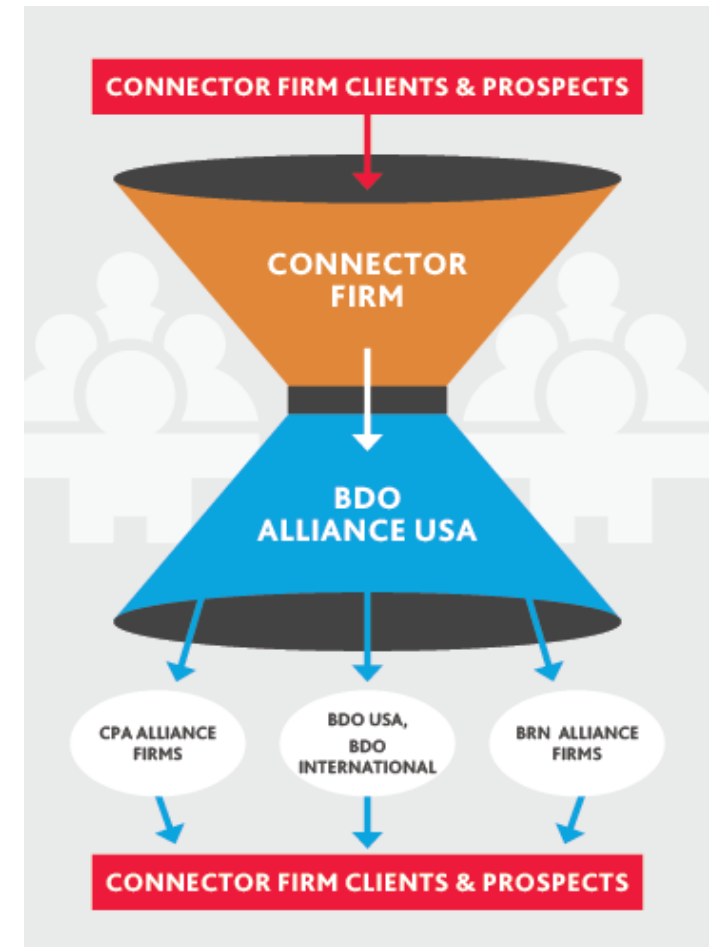


SOME SPECIFIC SOLUTIONS FOR FEI MEMBERS TO CONSIDER

- ▶ 1031 Property Exchange
- ▶ Compensation & Benefits
- ▶ International Tax
- ▶ Property Tax
- ▶ State & Local Tax
- ▶ Tax Credits and Incentives
- ▶ Aviation Tax & Accounting
- ▶ Specialty Insurance Solutions
- ▶ Real Estate Investment platform
- ▶ Foreign Exchange
- ▶ Merchant Services Cost Savings
- ▶ Business Outsourcing/Family Office
- ▶ Cybersecurity services
- ▶ Succession Planning/Change Management

WHAT THE ALLIANCE MEANS TO FEI MEMBERS

- Access to all types of accounting related resources
 - Audit
 - Tax
 - Specialty
- Access to regional, national and international firms
 - <https://www.bdo.com/alliance-locations>
- Access to the entire spectrum of consulting and product firms
- A Community that can help you respond to your firm's or customer's needs no matter what they are
- An opportunity to solve problems with high quality providers



DISCUSSION WITH BDO ALLIANCE LEADERS

Anna Brosche - BDO Alliance USA - Southeast Relationship Partner



Bonnie Ross - Fiske & Company (South FL Alliance Firm) - Director of Client Service



ACCESS ALLIANCE RESOURCES FROM THE FEI EXPERT SOURCING PAGE

Our Expert Sourcing Team

Equipped with an arsenal of best-of-breed Expert Sourcing Firms, our highly experienced and multi-disciplined team of professionals amplify the perpetual value and success of advisory firms.



Wealth Engineering

Fusing advanced knowledge, experience, services and products with sound engineering principles to create a synchronized hub for family and business wealth building.

FusionPower™

Fortify your client value proposition by fusing new services and products into your offering; creating fresh revenue and profit silos while enhancing client acquisition and retention.

2023 BDO ALLIANCE USA QUESTIONS?

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