

# Company Overview

## OUR FOCUS

- Accounting & Assurance
- Tax Consulting & Compliance
- Business Consulting
- Technology & Risk Advisory

A Bay Area accounting firm going strong since 1976, offering sophisticated, international firm resources with a regional firm's team ownership and responsiveness. From start-up to exit strategy, we will guide you through your entire Business Development Life Cycle.

### ACCOUNTING AND ASSURANCE

From start-ups to large, multinational businesses in both the public and private sectors, OUM's CPA professionals have the right experience to tailor our audit and attest services to the unique situations of each client.

In addition to providing our clients an independent and objective view of their financial information, we offer valuable insight and advice on corporate governance and business practices, with the overall objective of increasing shareholder value and decreasing business risks.

#### Our primary areas of focus:

- Financial Statement Audits for Public & Privately-held companies
- Complex Accounting Consultations
- Employee Benefit Plan Audits
- A-133/Single Audits
- Financial Statement Reviews & Compilations
- Agreed Upon Procedures, Due Diligence Services, IPO Readiness

### TAX

A deep tax technical expertise coupled with decades of real-world practical experience serving some of the most complex businesses across the globe are what make us different from other firms our size. Whether it's preparing your first Form 1120, or thinking about expanding offshore, our scalable business tax services can be tailored to fit your unique and growing business needs.

#### Our primary areas of focus:

- Federal and State Income Tax Compliance
- Tax Consulting and Compliance
- Tax Provision (ASC 740/450)
- State and Local Transaction Tax Compliance and Consulting
- IRS and State Authority Tax Audit Representation and Tax Controversies



*“OUM provides excellent, professional services and are a pleasure to work with. They are reliable, responsive, efficient and really understand our business. As audit committee chair at NovaBay, I rely on their expertise for audit and tax support as well as for sound strategic advice.”*

**GAIL MADERIS,  
AUDIT COMMITTEE CHAIR,  
NOVABAY PHARMACEUTICALS**



## BUSINESS CONSULTING

Our business consulting services have helped a multitude of companies from small closely-held businesses to large multinational publicly traded corporations, achieve their tax and accounting objectives.

### We offer the following business consulting services:

- Business Management and Family Office
- Outsourced Solutions
- Business Acquisition & Succession Planning
- State Nexus & Taxability Review
- Transactional (Mergers and Acquisitions) Consulting
- Tax Accounting Method Studies
- Business Restructuring Tax Impact Analysis

## RISK ADVISORY

OUM's risk management team has the experience and agility to assist you with your enterprise risk management needs. Engage OUM and take advantage from the efficiencies of working with CISA (Certified Information Systems Auditor) certified IT auditors. We can identify and address the risks of fraud, data breaches, and reporting errors – and help inspire trust among your customers and investors.

Our primary areas of focus:

- SOX Compliance
- Internal Audit Services
- Cybersecurity
- Third Party Assurance
- ISO27001 Advisory & Pre-Implementation Audits
- Privacy Services

## COMPANY OVERVIEW

- OUM & Co. LLP is an award-winning accounting & business advisory firm in California, with offices in San Francisco and San Diego
- We provide high quality assurance, tax and advisory services, and are committed to building lifelong relationships with our clients, employees and the communities we serve
- Listed as a Top 25 Bay Area firm, and recognized as one of the Top 200 firms in the U.S. by INSIDE Public Accounting
- Accounting & Financial Women's Alliance listed us as one of the top 10 accounting firm's nationwide for women's leadership



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