



# CREDIT UNIONS

## Let Us Count the Ways We'll Serve You

**At BMSS, we recognize the many things that make financial institutions unique,** especially when it comes to the Credit Union community. The value we can provide to our clients is demonstrated through our **long-term relationships, caring, thoughtful guidance and technical expertise.** We are committed to keeping our clients **in compliance with the IRS, NCUA and State regulations** in order to help each credit union best serve their credit union members. **Service** is not just a word for our team – **Service is our work in action.**





## How Do We Serve **Clients in Your Industry?**

Conduct  
Opinion  
Audits

Consult  
for changes in  
accounting issues,  
mergers and  
valuations

Provide  
agreed-upon  
procedures for  
Supervisory  
Committee, Bank  
Secrecy Act, and  
ACH Exams

Conduct  
Employee  
Benefit Plan  
Audits

IRS reporting:  
Form 990, Form  
990-T, Tax Notices  
and other filings

## **Services** We Provide

**AUDITS AND  
SUPERVISORY AUPs**



**BUSINESS  
CONSULTING**



**EMPLOYEE BENEFIT  
PLAN AUDITS**



**TAX PLANNING &  
COMPLIANCE**



### **EXPERIENCE**

BMSS works with  
**over 25 credit unions**  
from \$3 million to  
\$700 million  
in assets.

Serving  
clients in  
**Alabama  
and the  
Southeast.**

Experts  
in **Unrelated  
Business  
taxation.**

### **Industry Relationships with BMSS**

- Local involvement in regional Credit Union Chapter meetings
- League of Southeastern Credit Unions
- BDO Financial Institution Industry Group
- Northeast Alabama Chapter of Credit Unions
- Shoals Chapter of Credit Unions

### **DID YOU KNOW?**

**In 1996, BMSS held its first Annual Credit Union Roundtable** to serve the Credit Union community by providing answers on issues critical to Credit Unions.