



## US Tax Consultants of the Year

# Bambridge Tax Services

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Bambridge Tax Services is a tax advisory service providing tax advice to the creative industries and US expat tax services to Americans living abroad.

For the US expats, we have highly trained staff qualified to practice in both the UK and the US. We can advise on the interaction of the tax rules for the UK and US and how to report your income in both countries. The main advantage is we know the tax reliefs and exemptions that apply to expats and how best to minimise your tax across both countries.

By focusing on two specific groups of clients, we have been able to develop highly specialised knowledge for those clients. Each client has a dedicated accountant, so you always know who you are dealing with. In terms of managing our staff in order to form a productive working environment we are looking for excellence from our employees. We only employ exceptional individuals, we invest heavily in our staff; nurturing them, providing extensive training and development, so that they can reach their full potential whilst delivering the very best services to our clients.

We are delighted to have received this award and as we look ahead to the future this is definitely something we will look to build upon.

## Best for Residential Mortgage Compliance Assessments - Massachusetts

# Bankers Advisory



Company: Bankers Advisory, a CliftonLarsonAllen LLP Division  
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Bankers Advisory is an established firm which has grown into a compliance auditing practice, serving banks and mortgage lenders throughout the U.S by expanding its training bank personnel and the development of software tools.

In January 2014, Bankers Advisory was acquired by CliftonLarsonAllen LLP (CLA), the ninth largest public accounting firm in the United States. The acquisition has been highly successful due to CLA's mentoring of the succession team. Having almost 100% customer and employee retention, the firm continues to receive referrals for new business from their existing clients, helping to grow the business further and attain a loyal client base.

Anna started off her career in the finance industry as a banker, leading a mortgage underwriting department. Having been active in finance for many years, Anna has witnessed numerous changes taking place throughout the industry, including the shift in storing and processing data from paper to digital technology which has effected the way business is run.

Anna explains, "Compared to today's technology and speed, our former processes appear pre-historic. However, I believe that if mortgage lenders were to utilize some of these slower methodologies, they would avoid risky loans." As such, the firm utilises a number of unique strategies in order to better support their clients.

"Throughout the years, Bankers Advisory has never had a sales and marketing team. We have relied on direct referrals and the testimonials from clients and the endorsements from publishers and awards such as the AI Business Award make a difference.

"We inform our clients that we provide services in accordance with the regulatory agency requirements. However, we demonstrate our true worth after we secure the contract by delivering services and report metrics that are 'above the standard.' Anna adds.

Ultimately, the future for the firm lies firmly in educating and supporting its clients, according to Anna. "As thought leader for Bankers Advisory I author a range of best practices guidebooks on a regular basis which we distribute to our clients in order to better support them. I also publish a weekly newsletter called the "Compliance Monitor.

"Moving forward I intend to continue to offer this innovative service, and we have a new book coming out soon, for the public genre named Housing Finance 2020, a guide for the "new generation of homebuyers", which is due for publication in May 2016 in English and Spanish."