

Fintech Expertise You Can Trust

From innovations in technology to new digital currencies to the ever-present threat of cyber attacks, financial technology (“fintech”) companies face a host of unique challenges. Fintech companies must continually ask what’s next and approach the future with agility.

At Aprio, we’re dedicated to helping fintech companies achieve that future. Aprio serves fintech companies of all sizes, from startups to multi-billion dollar international companies. We provide a comprehensive range of services customized for fintech companies, provided by professionals with years of experience working in the industry. We help fintech companies thrive by:

- **Mitigating risk through information assurance** - Fintech companies face a unique set of industry challenges and standards around cybersecurity. We help fintech clients improve their risk management programs while delivering higher quality reports with less drama and disruption. Our core services include risk assessment (e.g., cyber assessments, ISO 27005, HIPAA risk analysis), IA support for trading partner risk management, PCI DSS Report on Compliance, AICPA SOC 1 and SOC 2 reporting, ISO 27001 certification, AT 101 for other subject matter and suitable criteria, AT 201 for agreed-upon procedures and pentesting.
- **Minimizing tax liabilities through planning and compliance** - Strategic tax planning and structuring can make a huge impact in the complex tax environment fintech companies face, whether it’s nationally or globally. At Aprio, we take a holistic approach to tax preparation and provide proactive tax planning specific to fintech companies, resulting in reduced tax liabilities and more money back in our clients’ pockets.
- **Providing peace of mind through financial assurance** - In the world of financial transactions, having accurate financial statements and robust internal controls is of paramount importance. Aprio works with fintech companies to provide peace of mind to key lenders and stakeholders by providing everything from agreed-upon procedures to a full financial statement audit.
- **Reducing tax exposures through state and local tax consulting** - Fintech companies regularly deal with customers and handle transactions across the U.S., which can open them up to the risk of tax penalties. Aprio’s dedicated State and Local Tax practices works with fintech companies to ensure they’re in compliance with all state and local tax laws.
- **Saving money through tax credits and incentives** - As regular innovators and a substantial sector of the U.S. economy, fintech companies are eligible for a plethora of tax credits and incentives, such as the federal and state R&D Tax Credit. These credits save fintech companies money that can be re-invested into new business ventures, hiring new employees, developing new technologies and more. Aprio helps fintech companies secure these lucrative credits and incentives, ensuring they leave no money on the table.

In addition to providing the services fintech companies need to prosper, we’re involved with a number of local and national organizations that support and encourage the fintech industry.



About Aprio

Since 1952, clients throughout the U.S. and across more than 40 countries have trusted Aprio for guidance on how to achieve what’s next. As a premier, CPA-led professional services firm, Aprio delivers advisory, assurance, tax and private client services to build value, drive growth, manage risk and protect wealth. With proven expertise and genuine care, Aprio serves individuals and businesses, from promising startups to market leaders alike.

Aprio.com



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