

FINANCIAL INSTITUTIONS



EXPERTISE YOU CAN RELY ON

HHM's financial institutions practice is led by experienced CPAs who understand the unique regulatory environment banks, credit unions, and specialty lenders operate in. Our team combines deep industry knowledge with a streamlined, risk-focused approach that prioritizes accuracy, compliance, and clear communication. We deliver efficient engagements that minimize disruption, provide transparency, and equip your leadership team with meaningful insights—not just reports.

STRENGTHENING YOUR INSTITUTION FOR WHAT'S AHEAD

Financial institutions face increasing pressure to modernize, maintain strong controls, and deliver reliable reporting in real time. Our team helps you stay ahead by monitoring regulatory updates, strengthening internal processes, and offering practical, results-focused guidance.

CLARITY THROUGH COORDINATION

Financial institutions often rely on multiple systems, departments, and third-party providers. Our team brings everything together—offering seamless coordination, regulatory awareness, and practical guidance across your operations. We help identify risks, streamline workflows, enhance internal controls, and ensure your institution operates with accuracy and confidence in today's evolving financial landscape.

WAYS WE CAN SUPPORT YOUR BUSINESS

Audit and Compliance

- Audits, Reviews, and Compilations
- Financial and Compliance Audits
- Regulatory Reporting Support
- CECL Analysis and Implementation Assistance

Tax Planning/Compliance

- Local, State, and Federal Filings
- Tax-Exempt and Multi-State Issues
- Strategic Entity Structuring
- Tax Planning

Financial Management

- Cash Flow Management
- Expense Analysis and Control
- Internal Financial Systems and Controls
- Asset/Liability Management Support

Strategic Services

- Training for Accounting Teams
- Operational Reviews
- Risk Management and Internal Audit Support