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## Niche accounting

After 43 years, Steven Bankler CPA Ltd. has become an overnight success. In recent years their client volume has grown substantially, and their staff has more than doubled. "We are a boutique CPA firm. We utilize only CPAs for client work. Other firms hand off important work to bookkeepers, CPAs-in-training, interns, or college students. "We don't," says Steven Bankler. In addition, they are very selective in the clients they serve. "We only serve business clients and their owners, and we limit the services we provide to exclusively serve this niche," he adds.

Due to the company's explosive growth over the last several years, they have started referring clients who no longer fit the firm profile to another small CPA firm that can better serve their needs. "We have a great network of colleagues that we're happy to tap into when needed. It helps us truly focus on our sweet spot."

Steven Bankler CPA Ltd. strives to be proactive with their clients. "We want to assist our clients not only in making money but keeping more of it. That means we discuss asset protection and exit planning as well as tax-saving strategies with them," Bankler continues.

During the Spring pandemic shutdown, the company leased the larger space next door and are in the process of



L-R: Steven Bankler CPA, PFS, Cr.FA, CFF, CGMA; **Ingrid Valdez**, CPA; **Corinna Garcia**, CPA; and **Gina Valorz** CPA, PFS, CGMA – Partner in a staff meeting discussing new PPP2 (Paycheck Protection Program) provisions.

remodeling. "We love the area of town we're in, and the extra space is terrific."

Steven Bankler CPA Ltd. is a specialty, boutique CPA firm. Their business clients have revenues in excess of \$1 million and are family owned or closely held businesses. "We keep that definition narrow

because these types of businesses and business owners have unique needs. Their business and personal tax strategies are often intertwined. What affects one, affects the other. So while we pride ourselves on not being 'jacks of all trades,' our work includes services like exit plan-

ning and asset protection to help our clients succeed in both areas," Bankler adds.

The Bankler team loves their San Antonio and Central Texas clients. And with modern technology (internet, portals, etc.) and FedEx, they have clients throughout the nation, from coast to coast. Additionally, they have clients who do business in foreign countries.

Bankler encourages and supports their employees in community endeavors. This past Christmas the Bankler staff participated in the Blue Santa Program through the San Antonio Chapter of CPAs. The company matched all employee contributions 100% and the toys were donated to this program.

When asked if there were any interesting stories to share about Steven Bankler CPA Ltd. since it opened in 1977, Bankler shared, "I have been lucky and worked on some very interesting projects. I was the sole investigative accountant for the US Senate Whitewater Investigation. In addition, I consulted for the US Senate Banking Committee regarding the audit of Swiss Banks' search for Holocaust victims' assets."

*Steven Bankler CPA Ltd. is a niche accounting firm located in San Antonio.*  
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