

# GSA 101:

## Navigating the GSA Multiple Award Schedule (MAS)



May 14, 2024

# Agenda

- About GSA MAS Contracts
- Advantages of GSA MAS Contracts
- What You Can Sell on GSA MAS Contracts
- Getting a GSA MAS Contract
- GSA MAS Contract Compliance
- GSA Schedule Information and Resources

# About GSA MAS Contracts

# Does Your Company Need a GSA MAS Contract?

If your company wants to do business with the Federal Government, it is beneficial to hold contract vehicles. General Services Administration (GSA) Multiple Award Schedule (MAS) contracts are a preferred method of buying for many agencies.

Obtaining a GSA MAS contract allows companies to sell products and services throughout the Federal Government with ease.

MAS contracts are a common entry point for commercial companies new to the Federal market.

# About GSA MAS Contracts

Long-term, government-wide contracts for commercial products and services at pre-negotiated prices and terms

MAS is a Multiple Award, Indefinite Delivery, Indefinite Quantity (MA/IDIQ) contract that is continuously open

“Evergreen” - five-year base period with up to three additional five-year options (potential total of 20 years)

“Hunting” license; no guarantee of business

**Myth:**  
GSA Schedule = Sales

**Reality:**  
You must market your Schedule and pursue business just like in the commercial world

# Advantages of GSA MAS Contracts

# Advantages of GSA Schedule

... for the customer (“Buying” or “Ordering Agency”)

- Streamlines the ordering process for federal customers
- Shorter lead times and lower administrative costs
- Easier access to a variety of commercial products and services
- Flexibility, ease of use, and choice
- Easy-to-use online proposal and procurement tools
- Cost savings due to pre-negotiated prices and terms

# Advantages of GSA Schedule

...for you, the Schedule Contractor (or “Offeror”)

- Pre-negotiated contract with established rates and terms
- Easier government-wide access as a prime contractor – can sell to any federal agency from a single contract
- Flexibility and ease of use
- Facilitates teaming with other GSA MAS contractors to propose a total solution
- Competitive advantage over non-Schedule holders
- Shorter order award time and lower administrative costs



# Who can buy from GSA Schedule Contracts?

GSA Directive ADM 4800.2I  
Eligibility to use GSA

Executive and other  
Federal agencies

Mixed-ownership government  
corporations (FDIC, World Bank,  
IMF, American Red Cross,  
NATO, WTO, etc.)

State and local governments  
through the Cooperative  
Purchasing and Disaster  
Recovery Programs

Some international  
organizations

District of Columbia

## *Myth:*

Only the Federal Government can use GSA Schedule

## *Reality:*

There are conditions that allow other entities  
to use GSA Schedule

# What You Can Sell on GSA MAS Contracts

# What Can You Sell on GSA MAS Contracts?

## Just about anything!

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- Millions of commercial products and services
- Choose from 12 Large Categories and hundreds of Special Item Numbers (SINs)
- Easy access to important competitive information
  - GSA MAS Solicitation
  - Special Item Number (SIN) Descriptions
  - State and Local Program Details
  - Contractor Information and Pricelists



# What Can You Sell on GSA MAS Contracts?

**GSA eLibrary** GSA Federal Acquisition Service

Welcome! GSA eLibrary is your one source for the latest GSA contract award information. GSA offers unparalleled acquisition solutions to meet today's acquisition challenges. GSA's key goal is to deliver excellent acquisition services that provide best value, in terms of cost, quality and service, for federal agencies and taxpayers.

GSA offers a wide range of acquisition services and solutions utilizing a variety of tools, contract vehicles, and services to meet the customer's specific needs including Multiple Award Schedules, Governmentwide Acquisition Contracts, Technology Contracts, and Assisted Acquisition Services. For more information on what GSA has to offer, visit [GSA.gov](http://GSA.gov).

**Search** in all the words Search  
enter Keywords, Contract Number, Contractor/Mfr Name, Schedule/SIN/GWAC Number, NAICS

Contractor Directory (a-z) Total Solution Search

**Category Guide**

- Facilities
- Human Capital
- Information Technology
- Office Management
- Scientific Management and Solutions
- Transportation and Logistics Services
- Furniture & Furnishings
- Industrial Products and Services
- Miscellaneous
- Professional Services
- Security and Protection
- Travel

**News...**

**Use your Unique Entity ID (SAM)**

As of April 4, 2022, the government is no longer using the Data Universal Numbering System (DUNS) number as the authoritative Unique Entity Identifier and has transitioned to the new Unique Entity ID (SAM) generated at SAM.gov. Click [here](#) for more information on the government transition to Unique Entity ID (SAM).

**Get Quotes**

GSA eBuy is an easy-to-use electronic Request for Quotation (RFQ) system designed to facilitate the request for submission of quotations.

With eBuy, getting quotes is just a click away!

**Additional Information**

**Customers**

- Connect With Your Customer Service Director
- Training Opportunities
- FPDS-NG
- EPLS
- GSA Strategic Sourcing BPAs
- Acquisition Gateway

**Contractors**

- FedBizOps
- Schedules Sales Query
- Vendor Support (VSC)

**Quick Search**

Go to Select a Contract Vehicle

**Schedule Contracts**

GSA schedule contracts offer direct delivery of millions of state-of-the-art, high-quality commercial supplies and services at volume discount pricing!

- View schedule contracts
- GSA schedules info
- VA schedules info
- MAS Available Offerings
- MAS Clause Applicability Matrix

**Technology Contracts**

GSA technology contracts cover the whole spectrum of IT solutions, from network services and information assurance to telecommunications and purchase of hardware and software.

- View technology contracts
- GSA technology contracts info

**State and Local Governments**

**Cooperative Purchasing**

Purchase IT products, services, and support equipment from Federal Supply Schedules.

- View participating vendors
- Cooperative Purchase FAQ

**Disaster Purchasing**

Purchase products and services to facilitate recovery from a major disaster.

- View participating vendors
- Disaster Purchasing FAQ

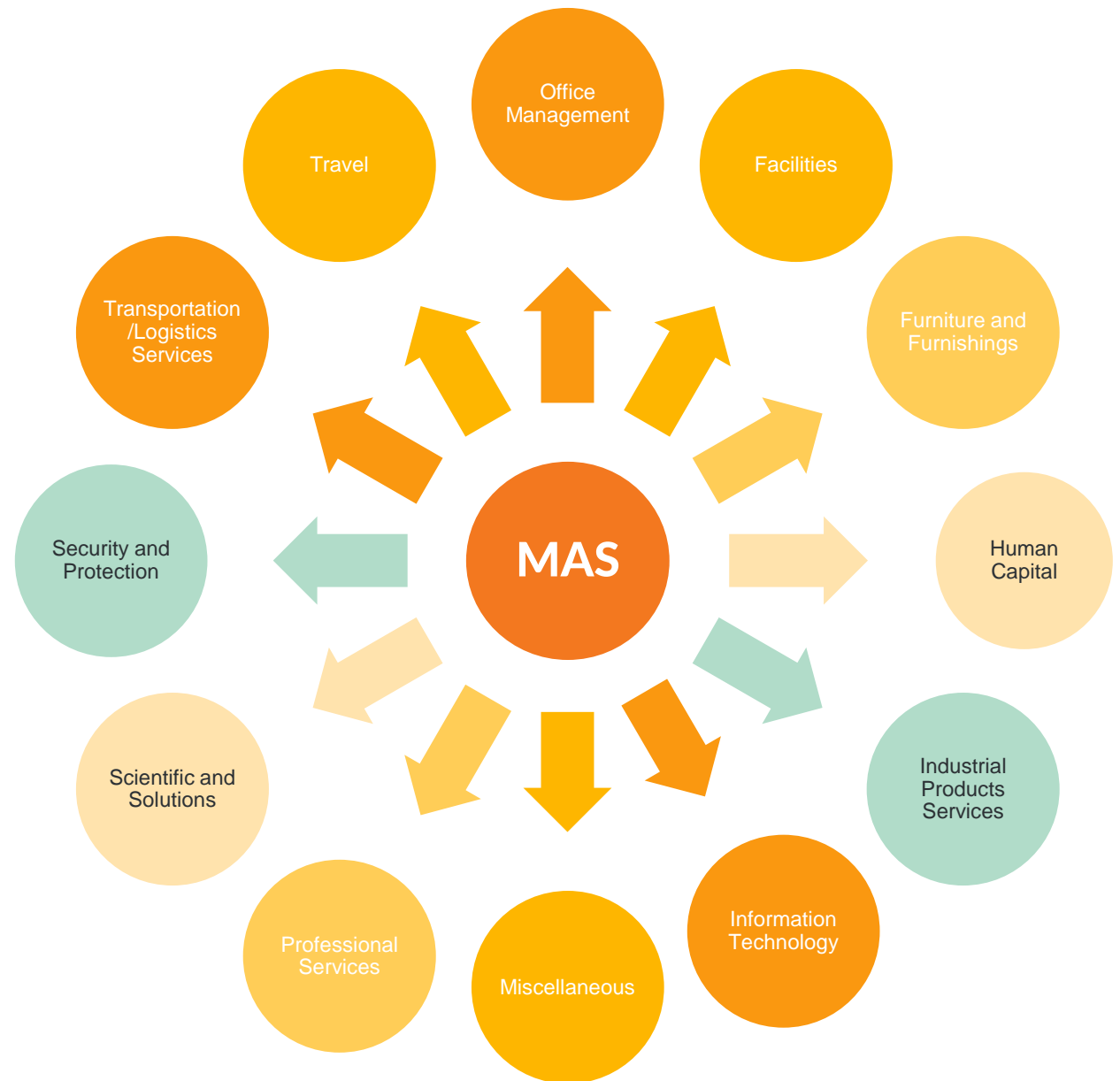
## Myth:

Choosing the correct Large Category (and SIN) is easy

## Reality:

Category boundaries don't always mirror the commercial world

# Scope of GSA MAS Contracts – Large Categories





# Getting a GSA MAS Contract – Eligibility, Proposal, and Negotiations

# Eligibility and Evaluation Criteria

## Corporate Experience

- Does your company or its principals have experience providing the proposed products or services?
- Does your company have adequate internal controls for accounting, staffing, subcontracting, and quality control?

## Ability to Demonstrate Financial Capability and Stability

- Net income and retained earnings
- Access to a corporate line of credit with available credit
- Positive debt-to-equity ratio
- Positive credit report



# Eligibility and Evaluation Criteria

## Project Experience

- Does your company have a history of successful past performance and customer references?
- Does your company have recent projects that demonstrate capabilities under the proposed SINs? Please note certain SINs have special requirements.

## Product, Service, and Pricing Information

- Can your company provide support for its proposed pricing?
- Are proposed products compliant with the Trade Agreements Act (TAA)?
- What are the minimum education, experience, and functional requirements for all proposed labor categories?

**Myth:**  
Previous government sales  
are required for new  
Offerors

**Reality:**  
GSA's primary focus is on  
commercial sales and  
existing GSA prices



# Additional Information GSA Will Request

- **Product Offers:** Part number, product description and literature, commercial pricelist, UPC, warranty, delivery terms, Letter of Supply (resellers only)
- **Service Offers:** Professional compensation plan, uncompensated overtime policy, education and experience substitutions, training course details, labor law (e.g., Service Contract Labor Standards/ Service Contract Act)
- Subcontracting Plan - Applies only to large businesses
- End User License Agreement (EULA), Terms of Service Agreements (TOS) if applicable, requires GSA legal approval
- Identification of contractor points of contact

# GSA MAS Proposal Process

## Preparing and Submitting an Offer

- **Determine products/services to be offered**
  - Obtain and read the Multiple Award Schedule solicitation
  - Identify appropriate Large Categories and Special Item Numbers (SINs)
  - Determine the GSA “bill of materials”
- **Complete all administrative requirements**
  - Register your company in the System for Award Management (SAM), including the relevant NAICS codes for the proposed SINs
  - Complete Readiness Assessment and Pathway to Success training

# GSA MAS Proposal Process

## Preparing and Submitting an Offer

- **Prepare Offer – Respond to all solicitation requirements**
  - Note that there are attachments and documents beyond the basic solicitation that may apply to your offer. Review the solicitation and GSA's online roadmap carefully.
  - Administrative Proposal
  - Technical Proposal
  - Pricing Proposal
- **Submit, track, and negotiate**

# Standard Offers – *Administrative Proposal*

## Requirement

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Readiness Assessment

Pathways to Success

Previous cancellations, rejections, and pending offers\*

Financial Statements

System for Award Management (SAM)

Agent Authorization Letter

Small Business Subcontracting Plan\*

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*\*May not apply to all offerors*

# Standard Offers – *Technical Proposal*

## Requirement

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Factor 1 – Corporate Experience

Factor 2 – Past Performance

Factor 3 – Quality Control

Factor 4 – Project Experience

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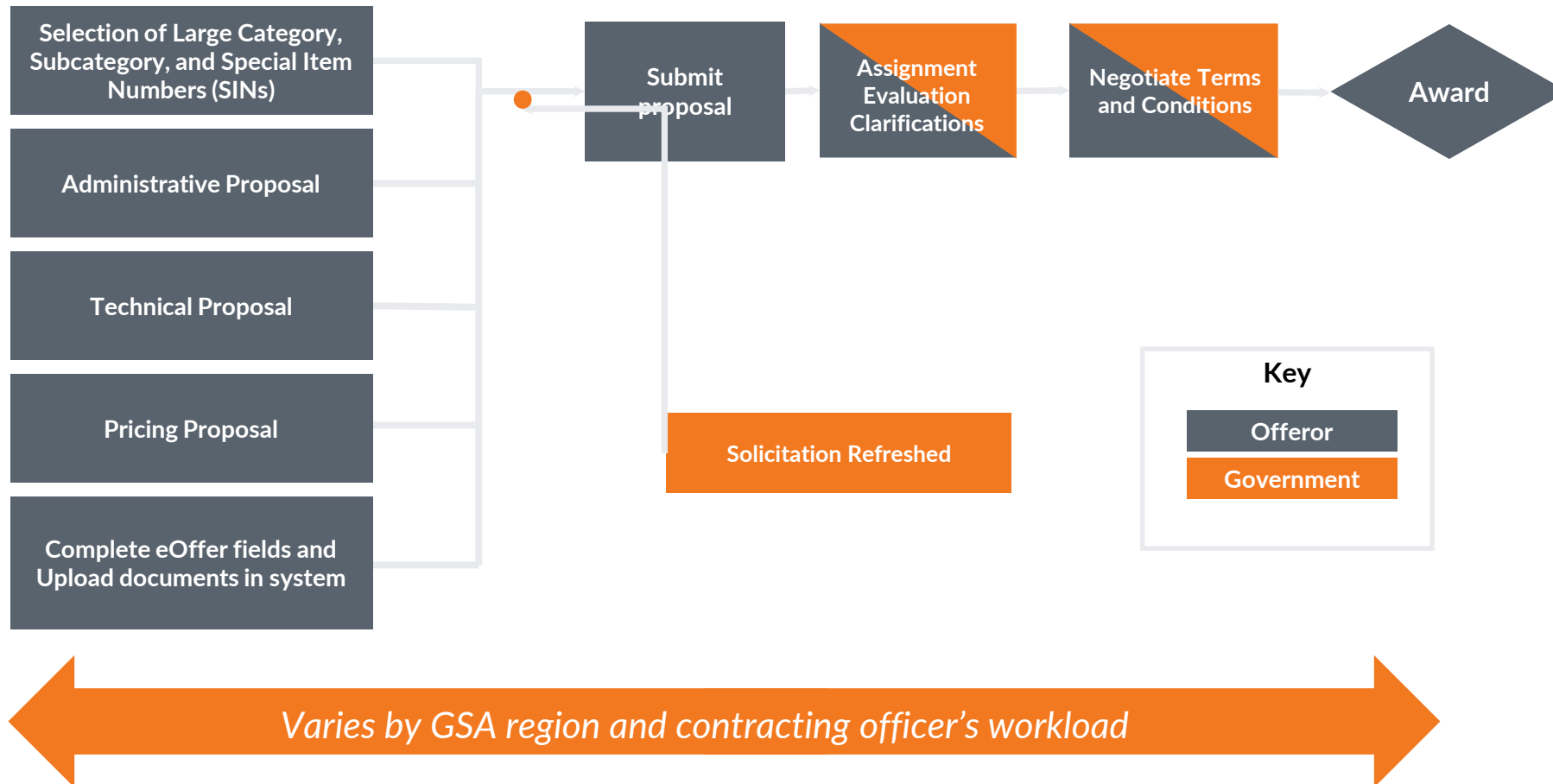
# TDR vs. CSP Offers – Pricing Proposal

Requirement	TDR	CSP
Price Proposal Template	Yes <sup>1</sup>	Yes
Commercial Sales Practices (CSP)	NO	Yes
Commercial Pricelist / Market Rates	Yes	Yes
Supporting pricing documentation	NO	Yes
Mechanism for future price adjustments	Yes	Yes
Detailed price narrative	Yes	Yes
Service Contract Act (SCA)/Service Contract Labor Standards*	Yes	Yes

\*May not apply to all offers

<sup>1</sup>Excludes Most Favored Customer (MFC) disclosure fields

# MAS Offer Timeline



**Myth:**  
GSA award  
timeframe is "X"

**Reality:**  
Many factors affect  
the time to award.

# Best Practices for Successful Contract Award

Understand what you are agreeing to before submitting a proposal!

Assure that all disclosures are current, accurate, and complete.

Carefully vet any information submitted to the government.

Respond promptly to GSA inquiries.



# Best Practices for Successful Contract Award

**Dedicate sufficient resources to offer preparation.**

Offer requires input from several areas within company (i.e., sales, accounting, management, administration)

**Appoint single point of contact as liaison with Government.**

POC should have a comprehensive understanding of company and can respond to inquiries from GSA.

**Closely coordinate offer preparation with both your government and commercial organizations.**

Holding a MAS contract can affect a company's pricing to its commercial or federal customers.

# GSA Negotiation Objectives

GSA always negotiates three discounts:

1. Basic Discount
2. Prompt Payment Discount
3. Quantity / Volume Discount

Not all three discounts are typically required, but offerors should be prepared to defend their proposed discounting if they are not willing to make any concessions.

At the conclusion of negotiations, the agreed-upon terms are memorialized in the Final Proposal Revision (FPR).

***Myth:***

GSA rates are based only on commercial pricing

***Reality:***

GSA will compare your offer to competitor rates

# GSA MAS Contract Compliance

# Compliance Best Practices

- Maintain system for accurately identifying, tracking, and reporting GSA contract sales
- Report GSA contract sales and remit Industrial Funding Fee (IFF) on time
- Only provide resources who meet the requirements of their GSA labor category
- Ensure proposed products meet TAA and other federal requirements
- Meet minimum sales requirement (\$100K in base period, \$125K each option period)
- Monitor GSA discount relationship and extend negotiated discounts (as applicable)
- Maintain GSA price list on GSA Advantage!
- Initiate modifications when necessary and accept mandatory modifications
- Prepare for GSA Contractor Assessments (Annual / End of Term)
- Retain contract file as required
- Respond to the “Exercise Option Mod” notifications

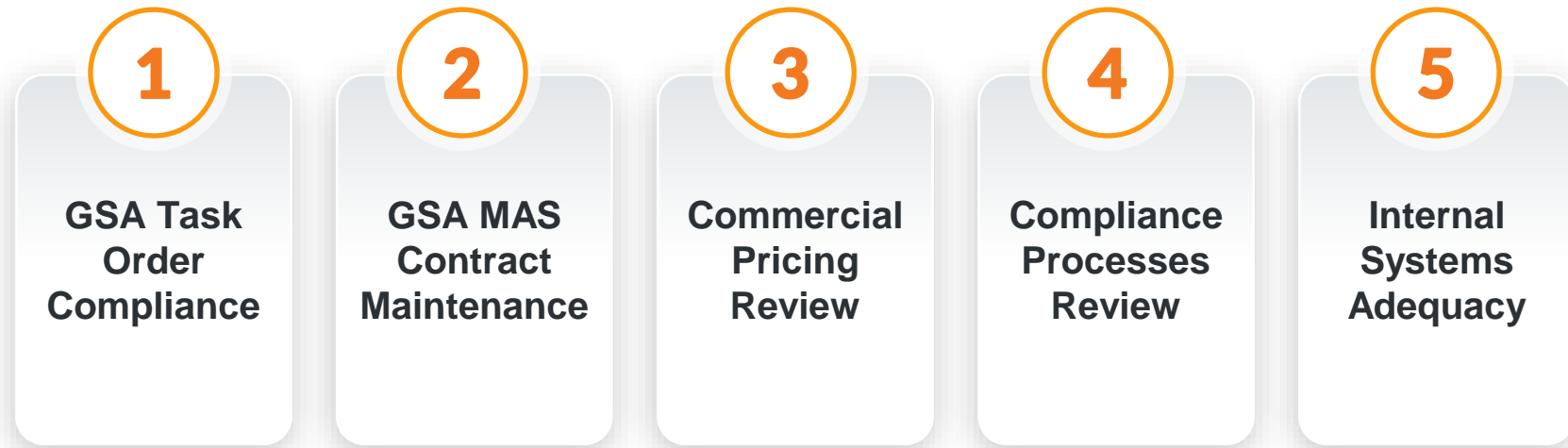
**Myth:**  
You live by GSA  
MAS sales

**Reality:**  
You die by GSA  
MAS non-  
compliance

# Triggers to Request a Modification

- Points of Contact updates
- Changes to Commercial Sales Practices
- Price Reductions Clause triggered
- Administrative changes to contract
- Novation, change of ownership, or name change
- SCA Wage Determination updates and/or changes
- New capabilities, products, or services
- Price changes
- Business size changes
- Address changes
- Changes to country of origin, delivery terms, lead times, etc.
- Update to Software License Agreement

# Elements of Successful Compliance Programs



Conduct Internal Reviews...**Regularly**

# Top 5 Ways to Lose Money After the Contract is Awarded, CSP Contracts

**01.**

Not understanding the Basis of Award

**02.**

Failing to reduce your prices when required

**03.**

Failing to increase your prices when allowed

**04.**

Failing to extend negotiated discounts (volume/quantity and/or prompt payment)

**05.**

Not educating the appropriate personnel on ongoing contract compliance and requirements

# Top 5 Ways to Lose Money After the Contract is Awarded, TDR Contracts

**01.**

Failing to expand contract to include new offerings

**02.**

Failing to reduce your prices when required

**03.**

Failing to increase your prices when allowed

**04.**

Failing to extend negotiated discounts (volume/quantity and/or prompt payment)

**05.**

Not educating the appropriate personnel on ongoing contract compliance and requirements



# GSA Schedule Information and Resources

# GSA eLibrary

<http://www.gsaelibrary.gsa.gov>

The screenshot shows the GSA eLibrary website interface. At the top, there is a navigation bar with links for Home, eBuy - quotes, GSA Advantage - online shopping, and Help. The main header area includes a welcome message and a search bar. Below the search bar is a 'Category Guide' section with various categories like Facilities, Human Capital, Information Technology, Office Management, Scientific Management and Solutions, Transportation and Logistics Services, Furniture & Furnishings, Industrial Products and Services, Miscellaneous, Professional Services, Security and Protection, and Travel. There is also a 'News...' section with a headline 'Use your Unique Entity ID (SAM)' and a 'Get Quotes' section. On the right side, there are several quick search and information panels: 'Quick Search' with a search box, 'Schedule Contracts' with a list of links, 'Technology Contracts' with a list of links, and 'State and Local Governments' with links for Cooperative Purchasing and Disaster Purchasing. The bottom of the page features a 'GSA eBuy' logo and a 'go to eBuy >>' link.

**Myth:**  
Your GSA rates are proprietary and confidential

**Reality:**  
Your GSA rates are publicly available on  
GSA eLibrary / Advantage

# Use GSA Advantage to your Advantage!

<https://www.gsaadvantage.gov>

The screenshot displays the GSA Advantage website interface. At the top left is the GSA Advantage! logo. On the right, there are navigation links: MY ACCOUNT, NSN ORDERING, eTOOLS, HELP, REGISTER, and LOGIN. Below this is a search bar with a dropdown menu set to 'Products' and a search input field containing 'Enter search keyword(s)'. To the right of the search bar is an 'Advanced Search' button and a shopping cart icon showing '0' items.

The main content area features three news cards:

- FASCSA** (NEWS): Supporting customers to implement FASCSA orders. Includes a 'Learn More' button.
- New Mod "Close Contract For New Awards" Enhances Transparency** (NEWS): Includes a 'Learn More' button.
- Billing Address ZIP CODE** (NEWS): Add a Billing Address Zip Code for Faster Processing. Includes a 'Learn More' button.

To the right of these cards is a 'Strategic Sourcing' section with a dropdown for 'Products' and 'Services', and a 'View All Offerings' button.

Below the news cards is a product listing for 'CASTLE LARGE'. It includes an image of a colorful inflatable castle, a 'Click image for expanded view' link, and a smaller thumbnail image. The product details are as follows:

<b>CASTLE LARGE</b>	
<b>Mfr Part No.:</b>	701
<b>UPC/ISBN/GTIN:</b>	99999999999999
<b>Manufacturer:</b>	INFLATABLE 2000
<b>Contract No.:</b>	GS-03F-0045U (ends: Mar 14, 2028)
<b>MAS Schedule/SIN:</b>	MAS/339930
<b>Warranty:</b>	1 YR
<b>Country of Origin:</b>	UNITED STATES OF AMERICA

Below the product details is a link: [Report incorrect product information \(Login Required\)](#)

At the bottom of the product listing, there is a price section: Price **\$1,726.90 EA**, with a note 'Shipping not included'. Below the price is a quantity selector set to '1' and an 'Add to cart' button.

At the bottom right of the product listing, it says 'sold and shipped by **INFLATABLE 2000, INC.** Contract minimum order: \$100.00'.

# GSA eBuy

[www.ebuy.gsa.gov](http://www.ebuy.gsa.gov)

## Interactive online Request for Quote (RFQ) tool for GSA MAS contractors ONLY

### Buyers

- Maximizes buying power
- Easy compliance with competition requirements

### Sellers

- Provides greater opportunities to reach new agencies, offer quotes, and increase business volume
- Find out who has money and warrants!

**Myth:**  
GSA opportunities are only available on eBuy

**Reality:**  
GSA opportunities are not required to be on eBuy

# Final Insights

**Selling to the Federal Government can seem daunting. Before deciding whether to pursue a GSA MAS contract, consider the following:**

- Obtaining a MAS contract does not guarantee new business. Successful contractors actively target agencies highlighting benefits of using MAS.
- Be prepared for the process to take time. Do you have resources to dedicate, or should you outsource this effort?
- Does your company have adequate financial and technical capabilities?
- Are you prepared to fully disclose your company's pricing practices and make your GSA pricing publicly available?
- The MAS solicitation doesn't tell the whole story. Contracting Officers can and will ask for additional information that is not explicitly required.
- There is a surprising amount of leeway in negotiations. If it's your first time negotiating a GSA MAS Contract, you may not understand that.
- **You don't know what you don't know.**

# Aprio's Government Contract Services Team



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Are there any  
Questions?



# Resources for New Contractors

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## GSA Vendor Support Center

[vsc.gsa.gov/](https://vsc.gsa.gov/)

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Day 1 with my new GSA Contract: Compliance, Education, Marketing

[New Contractor Start-up Kit](#)

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Compliance

Post a GSA Pricelist (catalog) to GSA Advantage  
FAS SRP (IFF) quarterly/monthly reporting

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Educational Resources

New Contractor Orientation Webinar  
New Contract Orientation PowerPoint Presentation  
Pathway to Success  
Steps to Success (A printable guide)  
Vendor Education Center  
Procurement Technical Assistance Center  
Events page  
Contractor Assessment Report

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Marketing

GSA Advantage  
GSA eBuy  
Vendor Support Center

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## Managing a Schedules Contract

[www.gsa.gov/portal/content/202845](https://www.gsa.gov/portal/content/202845)

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## GSA Interact

[interact.gsa.gov/groups](https://interact.gsa.gov/groups)

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# Resources for Market Research

*Find out who has money and what, when, and why they are spending it*

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SAM.gov - Procurement information All types of federal sales opportunities, not just GSA

<https://sam.gov/>

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List of Agencies and organizations eligible to use GSA

<http://www.gsa.gov/portal/content/104212>

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US Government web portal with agency links

[usa.gov/](https://usa.gov/)

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Agency procurement forecasts

<https://www.acquisition.gov/procurement-forecasts>

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Federal Procurement Data Systems (FPDS-NG)  
*FPDS - online record of federal contract awards*

[www.fpds.gov](https://www.fpds.gov)

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Federal Acquisition Jump Site

<https://prod.nais.nasa.gov/pub/fedproc/home.html>

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NAICS - North American Industry Classification System

<https://www.census.gov/naics/>

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# More Online Resources

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Aprio's blog: Current news, trends and insights government contractors

[www.aprio.com/insights](http://www.aprio.com/insights)

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About GSA Schedule

[gsa.gov/buying-selling/purchasing-programs/gsa-schedules](http://gsa.gov/buying-selling/purchasing-programs/gsa-schedules)

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GSA Schedule eLibrary: Search and view GSA /VA Schedules and participating vendors by keyword, alphabetical listings or number

<https://www.gsaelibrary.gsa.gov>

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GSA Advantage!  
Market research, and online customer ordering

<https://www.gsaadvantage.gov/>

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GSA eBuy: Interactive RFQ tool

<https://www.ebuy.gsa.gov/ebuy/>

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GSA Vendor Support Center

<https://vsc.gsa.gov/>

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GSA State and Local Programs

[gsa.gov/buying-selling/purchasing-programs/gsa-schedules/schedule-buyers/state-and-local-governments](http://gsa.gov/buying-selling/purchasing-programs/gsa-schedules/schedule-buyers/state-and-local-governments)

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GSA Office of Small Business Utilization (OSBU)

<https://www.gsa.gov/small-business>

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Small Business Administration (SBA)

<https://www.sba.gov/>

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# Aprio's GSA Consulting Services

# GSA MAS Contract Acquisition

**Provided on a fixed price and billed on a milestone basis with automatic conversion to post award contract maintenance support.**

- Review of Commercial Sales Practices
- Pricing Analysis
- Development of Price Strategy
- Preparation and Submission of the Offer
- Monitoring/Tracking the Proposal
- Clarifications/Negotiations
- Post Award Contract registrations and initial setup
- Initial GSA MAS Pricelist

# GSA MAS Contract Maintenance

Provided under a fixed price annual agreement and billed quarterly in advance of the work being performed.

- Evaluation of Organizational Changes
- Contract Modifications
- GSA Advantage Price List Updates & Uploads
- GSA Help Desk
- Contractor Assessment Visit (mini audit by GSA IOA with no subpoena authority)
- Guidelines for implementation GSA policies and procedures for all areas of compliance
- Notifications of GSA solicitation changes called mass mods
- Post Award Compliance Training

# GSA MAS Audits and Investigations

**Provided on a time and materials basis and billed monthly at Aprio's current hourly bill rates.**

- GSA Office of Inspector General (OIG) pre- and post-award contract audits
- GSA OIG investigation support
- Internal MAS compliance audits
- Mandatory disclosures regarding MAS contract issues
- Pre- and post-closing due diligence support regarding MAS contract issues
- Preparation of reports, exhibits, and calculations in support of internal audits, mandatory disclosures, and other complex GSA MAS matters
- Work can be performed in conjunction with or at the direction of counsel to protect legal privilege

# Aprilio<sup>®</sup>



A business advisory and CPA firm



# Our brand



# What Aprio means

Head



Technical  
expertise



Heart



Deep engagement  
and genuine care

# An Industry Leader



# A Recognized Leader

“A Best of the Best Accounting Firm”  
25<sup>th</sup> largest accounting firm in the nation  
6th fastest growing CPA firm in the nation  
Best Place to Work

This enables Aprio to consistently attract and retain the top talent



2013-2021



Top 100 1997-2018  
Top 50 2019-2021  
#35 2022



2017-2022



ACCOUNTING  
Top 20  
Firms to Work For



# The Aprio Way

31 Fundamentals  
define & guide our  
culture

1. Act with integrity
2. Do what's right for the client
3. Look forward
4. Be a fanatic about response time
5. Honor commitments
6. Be proactive
7. Be the expert advisor
8. Pay attention to the details
9. Provide a great client and team member experience
10. Value Differences
11. Deliver results
12. Practice blameless problem-solving
13. Listen generously
14. Speak straight
15. Get clear on expectations
16. Be curious
17. Be relentless about improvement
18. "Bring it" every day
19. Think one Aprio
20. Work smart
21. Share information
22. Embrace change
23. Walk in your clients' shoes
24. Be kind
25. Make a difference
26. Build meaningful personal relationships
27. Think and act like an owner
28. Be a brand ambassador
29. Celebrate success
30. Respect confidentiality
31. Keep things fun

# Our business **mindset**



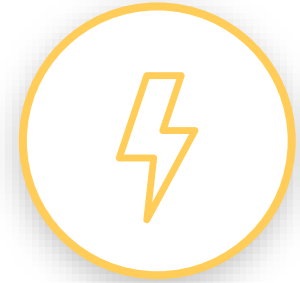
Radical disruptors and  
leaders in a traditional  
profession



Delight in  
challenging the  
status quo



Focus on  
how to best  
cross-serve clients



Fail fast and  
fail often, take  
calculated risks

# By the numbers

Aprio  
today



**1,500+**  
Team  
Members



**170**  
Partners



**8**  
Industry  
Specialties



**35+**  
Services



**35+**  
Languages  
Spoken



Clients in  
**50+**  
Countries



**#25**  
In the U.S.



**25%**  
Team Member  
Diversity



**900**  
Retirement  
Plans



**\$1.4**  
Billion in AUM



**5 VC**  
Investments



Morison  
Global

# Team members serving clients across the nation and around the globe



**United States**  
**1350**  
13 Locations



**Philippines**  
**150**




**Canada**  
**3**



**United Kingdom**  
**2**

## 14 US Locations:

- Atlanta, GA
- Alpharetta, GA
- Birmingham, AL
- Charlotte, NC
- Fairfield, NJ
- Greensboro, NC
- Nashville, TN
- New York, NY
- Mount Airy, NC
- Raleigh, NC
- Rockville, MD
- San Francisco, CA
- Valdosta, GA
- Walnut Creek, CA



**Netherlands**  
**1**



**New Zealand**  
**1**



**South Africa**  
**1**

# A diverse client base



Mid-market  
CEOs/CFOS  
business owners



High net-worth  
Individuals



Small businesses  
and entrepreneurs



Public companies  
(Specialty services)



Private equity  
firms

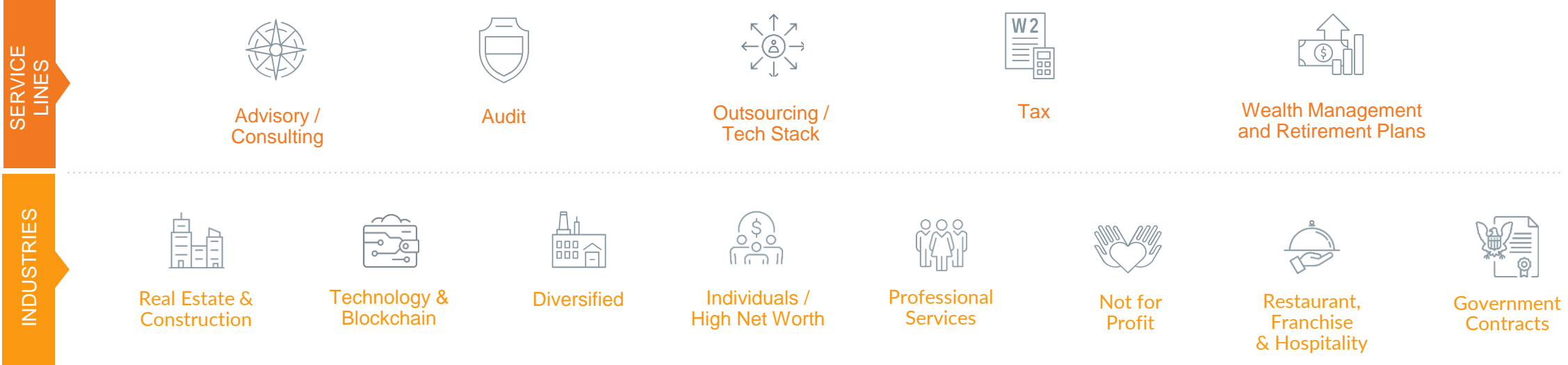


Individual tax  
clients





# Combined expertise is expanded across industries, services and capabilities



## SPECIALTY TAX

- Employee Retention Credit
- Paycheck Protection Program
- State and Local Tax
- Tax Credits and Incentives
- International Tax & Transfer Pricing

## DIGITAL ADVISORY

- Data and Analytics
- Blockchain
- Digital Transformation
- Enterprise Risk Management
- Cybersecurity Advisory
- Information Assurance

## OUTSOURCING

- Accounting
- Payroll
- HR & People Advisory
- IT & Financial Staffing

## BUSINESS PERFORMANCE

- Business Brokerage
- Transaction Advisory
- Business Valuation
- Financial Consulting
- Treasury Optimization Services
- ERP- Sage, Intact, Unanet & NetSuite

# We are advisors across industries, services and capabilities

## INDUSTRIES



Real Estate & Construction



Technology & Blockchain



Diversified



Individuals / High Net Worth



Professional Services



Not for Profit



Restaurant, Franchise & Hospitality



Government Contracts

## SERVICE LINES



Advisory



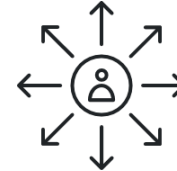
Audit



Tax



Private Client



Outsourcing



Talent

# Specialty services

## SPECIALTY TAX

- Employee Retention Credit
- Paycheck Protection Program
- State and Local Tax
- Tax Credits and Incentives
- International Tax & Transfer Pricing

## BUSINESS PERFORMANCE

- Business Brokerage
- Transaction Advisory
- Business Valuation
- Financial Consulting
- Treasury Optimization Services

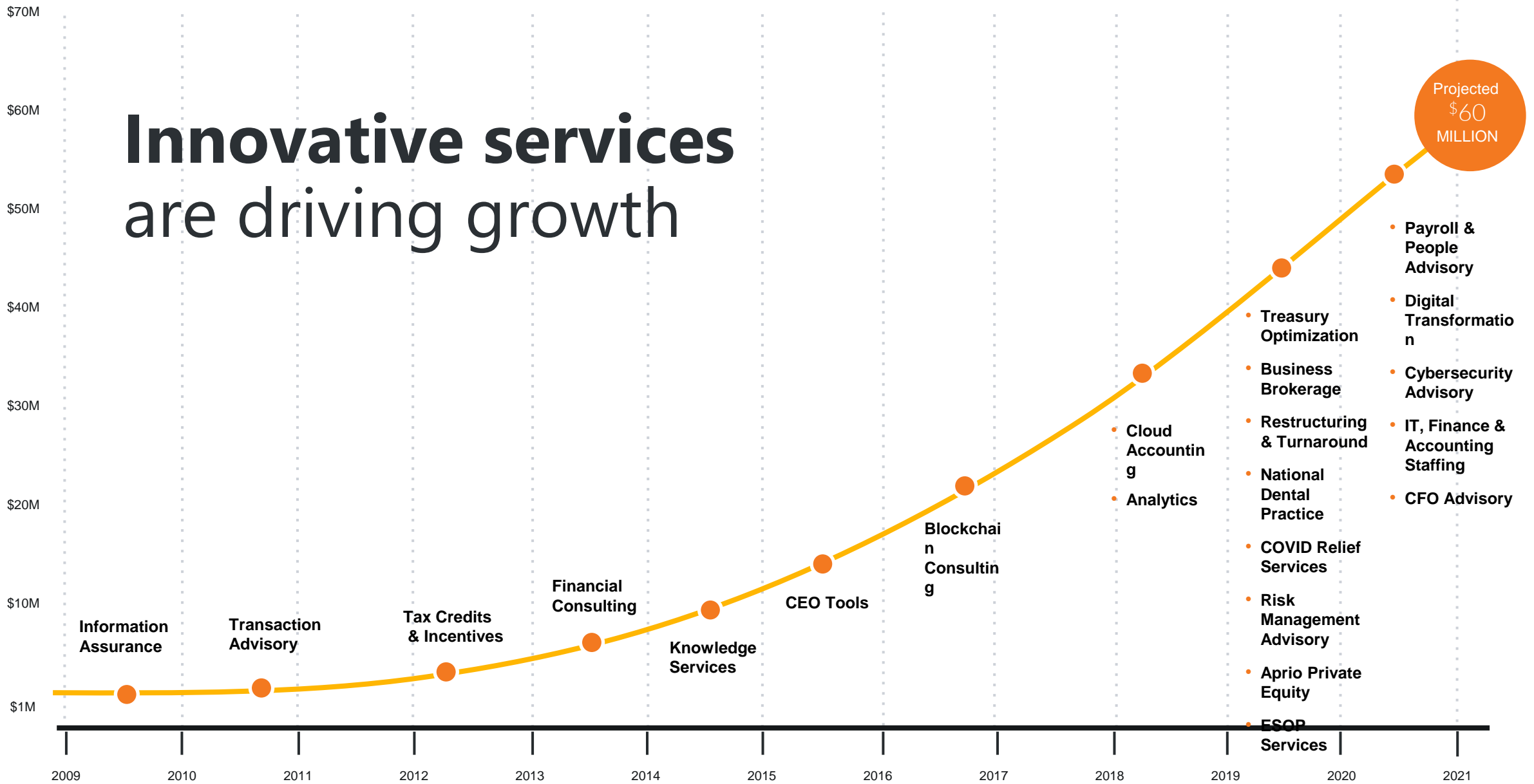
## DIGITAL ADVISORY

- Data and Analytics
- Blockchain
- Digital Transformation
- Enterprise Risk Management
- Cybersecurity Advisory
- Information Assurance

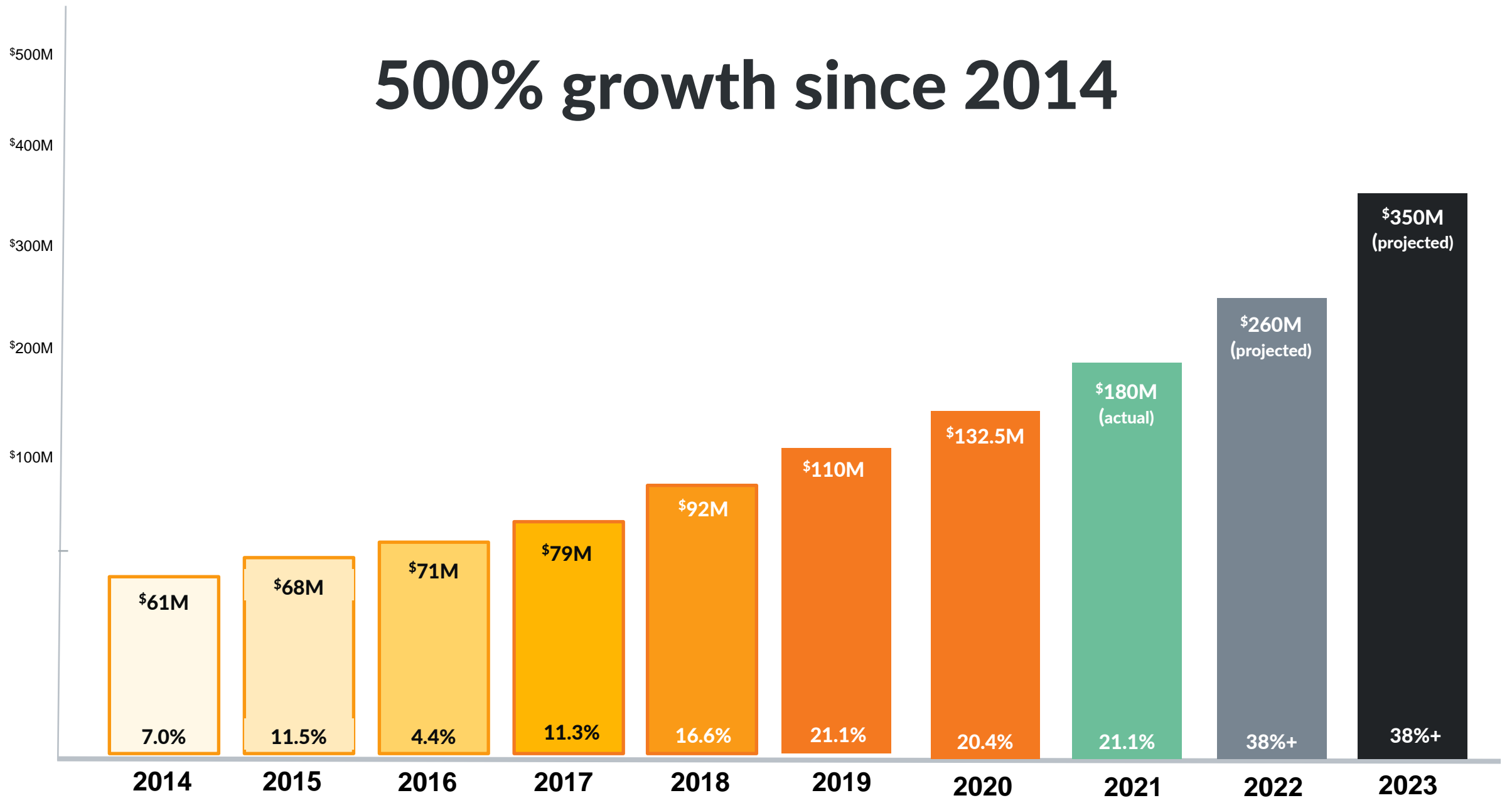
## OUTSOURCING

- Accounting
- Payroll
- HR & People Advisory
- IT & Financial Staffing

# Innovative services are driving growth



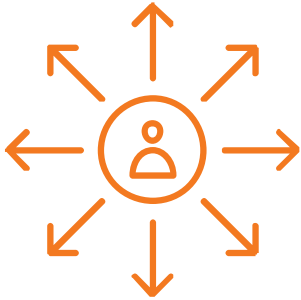
# 500% growth since 2014



# Drivers of **growth**



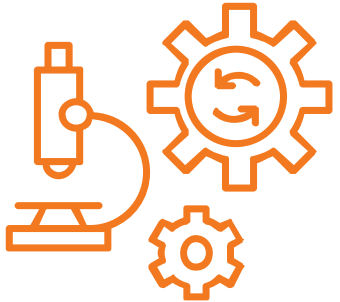
Organic Growth  
(Stewardship Model)



Aprio  
Firm  
Foundation



Mergers and  
Acquisitions



Deliver More  
Specialty Services  
to Clients