

# Manufacturing the future



Manufacturing & Distribution Group

Aprio<sup>®</sup>  
Passionate for what's next<sup>®</sup>

# HOW WILL YOU OWN YOUR FUTURE?

As business owners assess opportunities from vertical integration to digital transformation, only those with the insights, capabilities and relationships to pivot rapidly, will own their futures.

Aprio has been helping manufacturing and distribution companies achieve profitable growth and manage risk since 1952. We deliver expertise across tax, audit, wealth management, outsourcing, M&A transaction advisory and over 35 specialty services. This breadth of expertise provides fast access to comprehensive services that support the needs of growing businesses, founders and investors across the business lifecycle.

## Delivering manufacturing success imperatives



### MAXIMIZE LIQUIDITY

Leverage federal, state and international R&D tax credits.



### MITIGATE IT RISK

Defend against cyber threats and achieve data privacy and security compliance.



### STAY INVESTOR READY

Generate financials for investors with little or no strain on your team.



### EXPAND GLOBALLY

Navigate inbound and outbound investments with experienced global advisors.



### MAXIMIZE EQUITY INCENTIVES

Structure the right equity incentives and communicate their value to employees.



### ACCESS TO CAPITAL

Connect with our deep network of venture capital and private equity firms.



### MAXIMIZE M&A

Partner with Aprio to manage risk, drive growth and increase return on investment.



### MANAGE WEALTH

Integrate financial, investment and tax planning to achieve your financial goals.

## Aprio is a single-source growth partner

Aprio serves over 800 manufacturers and distributors around the globe. Leverage our industry expertise and deep network of venture capital and private equity firms, investment bankers, law practices and alliance partners to forge your future.

Whether you are starting up, expanding plant operations, or going green Aprio is your single source growth partner to achieve what's next.



**Adam Beckerman, CPA**  
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Leader, Assurance Partner

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## Empowering growth across the business lifecycle



# Comprehensive services and industry expertise

## Tax Services

### Federal and State Tax Services

- Entity selection
- Business structuring
- Planning and preparation
- Provision for income tax
- M&A services

### Tax Credits and Incentives

- R&D tax credits – federal & state
- U.K. and Canadian tax credits
- Film tax credits
- Gaming tax credits
- Jobs credits – federal & state

### International Tax Services

- Global tax planning
- Global tax compliance
- Global mobility

### State Sales and Use Tax

- Nexus, compliance and remediation
- Managed compliance solutions

**APRIO HELPED CLIENTS CLAIM**

**\$90+M**

In federal and state tax credits in 2020 alone

## Audit Services

### Financial Audit Services

- Audit readiness
- Audits, reviews and compilations
- U.S. GAAP and IFRS audit
- Pre-IPO readiness
- Post-IPO SEC filing assistance
- Internal audit

- Revenue recognition
- Compliance readiness and reporting
- Internal controls reviews
- Agreed-upon procedures
- Lease accounting consulting

## Cybersecurity, Data Privacy and Security Compliance

### Cybersecurity Solutions

- Automated security operations
- Penetration testing
- Application security testing
- Firewall device management
- Anti-money laundering (AML)
- Know your customer (KYC) consulting

### Compliance Readiness and Reporting

- SOC 1, 2, 3
- ISO 27001 and 27701
- HITRUST CSF
- PCI-DSS
- GDPR, CCPA

**DATA PRIVACY**

**#1**

Aprio is the first full-service CPA firm in the nation to achieve ANAB accreditation as an ISO 27701 Certifying Body.

## Employee Recruiting and Retention

### Retirement Plan Services

- Design of 401(k) and other retirement plans
- Third-party administrator (TPA) services
- 5500 filing and plan compliance
- Investment advisory\*
- Employee education

### Staffing

- Information technology staffing
- Accounting and finance staffing

**\$1 B**

In retirement plan assets under management

## Specialty Services

### M&A Consulting and Diligence

- Quality of earnings (QoE) analysis
- Tax due diligence
- Financial due diligence
- Tax structuring
- IT due diligence for M&A

### Valuation

- M&A purchase price allocation
- For stock options
- Estate planning

### Enterprise Risk Management (ERM)

- Risk assessment
- Internal audit
- Internal controls review
- Operational improvement
- Business continuity services

### Digital Transformation Advisory

- Managed reporting and analytics
- Business process automation
- Data governance consulting
- Cloud migration services

### Enterprise Resource Planning (ERP)

- System selections
- Implementations
- Ongoing support

### Treasury Optimization Services

- Merchant processing optimization
- Banking fee negotiation
- Foreign exchange rate fee negotiation
- Bank relationship management

**75 COMBINED YEARS**

of Big 4 and middle-market transaction experience on Aprio's Transaction Advisory team.

## Outsourcing

### Outsourced Accounting

- Automated cloud accounting solutions
- Accounting advisory & support
- State and local tax solutions
- Budgeting & forecasting
- Managed accounting solutions

### People Advisory Services

- Payroll consulting and support
- Payroll processing
- Concierge payroll outsourcing
- PEO and HRIS solutions
- HR consulting and support
- Concierge HR outsourcing

Serving clients on

**Six CONTINENTS**

## Founder and Wealth Management Services

### Equity Incentive Consulting

- Stock options and incentives
- Qualified small business stock consulting

### Family Office Services

- Centralized planning and advisory
- Private capital investment coordination
- Public investment coordination
- Family operations

### Succession Planning

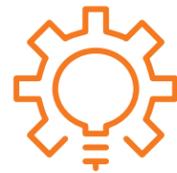
- Business transfer strategy
- Generational transfer planning
- Executive benefits

### Private Client Services

- Estate and trust planning
- Financial planning
- Investment advisory
- Personal tax planning / preparation

# An active member of the manufacturing community serving businesses just like yours

APRIO FOUNDED THE MANUFACTURING BUSINESS FORUM



**NEXT GENERATION**  
MANUFACTURING



APRIO TRACKS ECONOMIC TRENDS

we share research with clients and the industry quarterly

# Dedicated Manufacturing & Distribution leadership

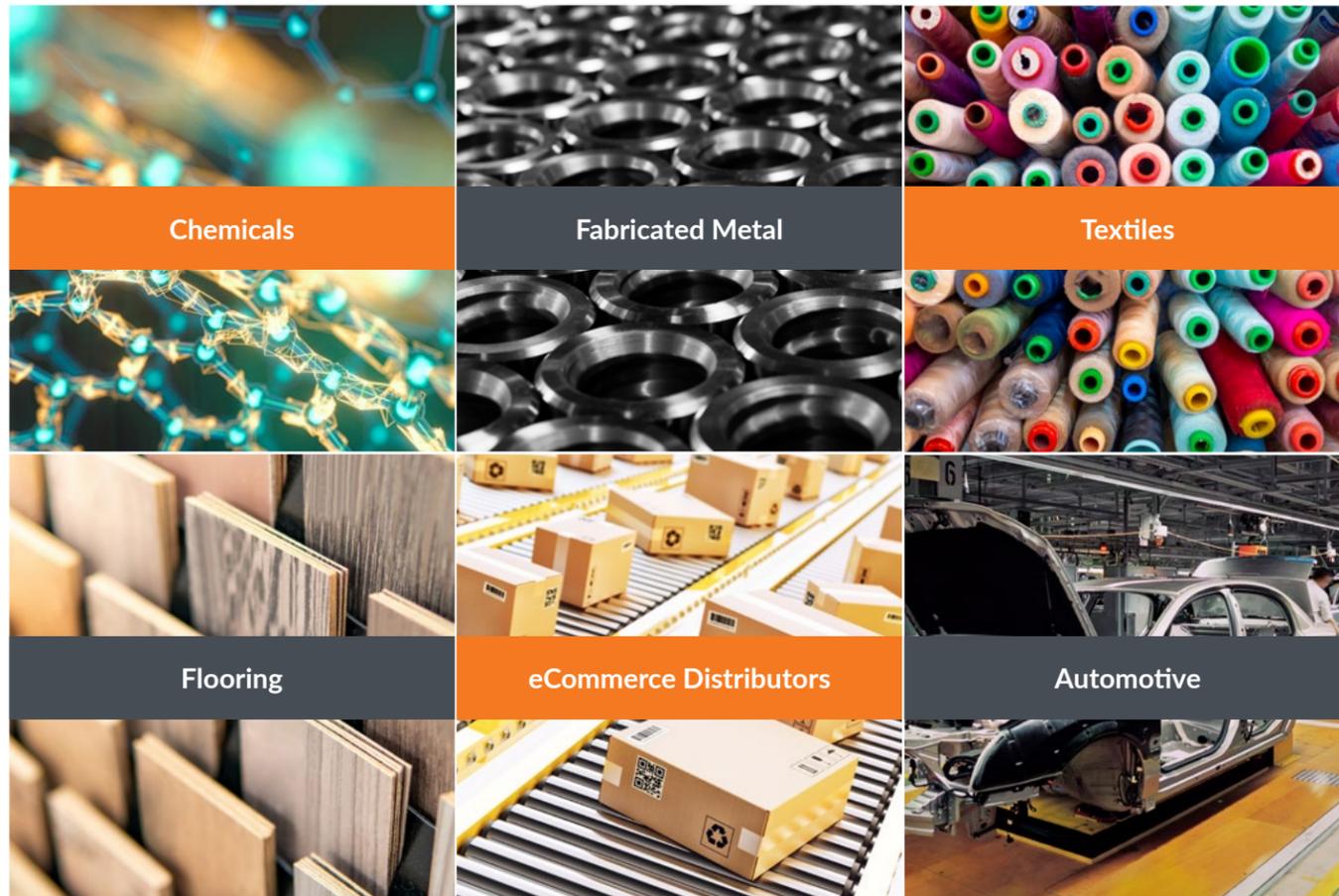
As a top 50 business advisory and CPA firm, Aprio provides the technical expertise and innovation you would expect from a large global provider, delivered with a more attentive client experience by senior-level team members.



**800+**  
Manufacturing clients=  
**16%**  
Aprio Annual Revenue

**MANUFACTURING & DISTRIBUTION GROUP**  
DEDICATED TEAM MEMBERS =

**200+**



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## About Aprio

Since 1952, clients throughout the US, and across more than 50 countries have trusted Aprio for guidance on how to achieve what's next. As a premier business advisory and CPA firm, Aprio delivers advisory, assurance, tax, outsourcing, staffing 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.



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