



Account for Anything™

Account for Anything™

With so much complexity and change, it's hard for businesses, individuals, and families to know what they don't know.

Economic and policy changes. Overlooked tax credits. Unnecessary expenses. The list goes on, and the costs add up.

Aprio eliminates oversights and foregone conclusions because we account for anything. Our "no unanswered questions, no unwarranted delays, no unfriendly faces" approach turns the unknown into opportunity.

With a fully integrated model of advisory, tax, legal, accounting, and wealth management services, we seamlessly navigate the knowns and unknowns alike – helping our clients save time, grow, manage risks, and do what they do best.

It's why thousands of businesses and private clients around the world put their trust in us.

Aprio. Account for Anything™.



We are growing so our clients can too.

Aprio is redefining the professional services industry.

We are reimagining all the ways we serve our clients and identifying opportunities to deliver more. Our goal is to build the firm of the future – one where clients have access to every service they need under one roof to grow their business, save time, and reduce risks.

It requires creativity, collaboration, and a pioneering commitment to move beyond traditional models. At Aprio, we keep our clients at the center of everything we do.

In 2025, the through line for Aprio was growing so our clients can too.

We acquired 16 highly respected firms to build capacity and capabilities across new and existing markets.

We launched Aprio Legal, becoming the first accounting and business advisory firm in the U.S. to open a full-service Alternative Business Structure (ABS) law firm.

We scaled the Aprio Alliance, bringing nearly 100 firms together, to extend the reach of support to clients across the U.S. and Canada.

We strengthened our Wealth Management team, adding new leaders and advisors to achieve better results for clients.

And we accelerated our use of AI-powered technologies to enhance our human intelligence, save our clients time, and elevate our client experience.

We welcomed more than 600 new team members to the Aprio team whose talent and industry knowledge will help our clients build their wealth.

By expanding our reach, diversifying our capabilities, and elevating our experience, we are offering clients an integrated, multi-disciplinary approach to scale their business and uncover new possibilities.

It is through this transformation and growth from within that we're able to Account for Anything™ and become the firm of the future.

It's what our clients expect, and no one delivers better than the amazing team at Aprio.

Richard Kopelman | CEO

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Building the Firm of the Future

2025 Highlights

- Aprio added 16 teams across the U.S., building capacity and enhancing talent in every facet of our business.
- Formed Aprio Legal through a combination with Arizona-based Radix Law. Aprio became the first accounting and business advisory firm operating a law firm.
- Aprio Alliance grew to 100 firms in the U.S. and Canada to expand our reach and ability to better serve our clients.
- Intuit and Aprio partnered to accelerate mid-market business growth with AI-powered advisory and technology.
- With new leadership and an integrated model, Aprio Wealth Management is elevating the client experience with dynamic solutions, managing \$5+ billion in assets.
- The Aprio Foundation awarded nearly \$400,000 in Community Impact Grants to 66 nonprofit organizations across the U.S. that create pathways to access, hope, and opportunity.
- Aprio launched Aperture, a week of learning, professional development, insight, and connection to strengthen team members across the firm.

Aprio By the Numbers

\$5.5B ASSETS UNDER MANAGEMENT

7 PRACTICE AREAS

17 INDUSTRIES SERVED

40 OFFICE LOCATIONS

2,800+ TEAM MEMBERS

66 ORGANIZATIONS IMPACTED BY COMMUNITY GRANTS AWARDED BY THE APRIO FOUNDATION

\$400K+ CONTRIBUTIONS TO COMMUNITY ORGANIZATIONS

2025 in review

Welcomed Aprio's first Chief People Officer – Carolyn O'Boyle

Promoted more than 300 people to new roles

Opened new offices in:

Hoboken, Little Falls, and
Scotch Plains, NJ

Portland, OR

Arlington, VA

Scottsdale, AZ

Chicago, Schaumburg, and
Libertyville, IL

Baltimore, MD

Los Angeles, CA

Overland Park and Topeka, KS

Dallas and Houston, TX

Named top employer by USA Today, The Washington Post, The Tennessean, The San Francisco Chronicle, The Atlanta Journal-Constitution, Schneps Media in New York City, NJ Media, and The Charlotte Observer

Aprio opens the U.S.'s first full-service law firm under Arizona's Alternative Business Structure Program

Aprio named to Vault's Top 150 Internships

Launched Aprio Alliance, combining PS+ and The Aprio Firm Alliance

Aprio's Lexy Kessler named chair of the AICPA

Aprio Wealth Management announces \$5.5 billion assets under management

Committed \$300 million over 5 years to advance AI and automation

Launched Aprio's new proactive, planning-led tax client experience that delivers year-round guidance tailored to life events, financial goals, and evolving needs

Spent 6,200 hours serving our communities

Pioneering the Legal Profession

Joining forces with Arizona-based Radix Law, Aprio became the first national accounting and business advisory firm to open a law firm.

Aprio's move into the legal space not only transforms how we serve our clients, it also reshapes the entire CPA profession. Aprio Legal offers a holistic approach to navigating business and legal complexities with cohesive guidance and forward-thinking solutions. Clients can now seamlessly connect with our team of multi-disciplinary professionals in one place for both legal insight and business foresight.

Our tax advisors, CPAs, transaction advisors, wealth advisors, and attorneys collaborate to deliver business-aligned legal counsel on everything from corporate, employment, and real estate law to family and estate planning, alternative dispute resolution, and mergers and acquisitions.

It's an approach to the client experience that's as distinctive as it is effective.

Excellence In Wealth Management

With over \$5.5 billion in assets under management, Aprio Wealth Management is ushering in a new era of holistic client experience.

Aprio Wealth Management is simplifying the complexities of wealth management and setting a new standard for client service. At the heart of our approach is a fully integrated model that aligns tax, estate, investment, and succession planning for individuals, families, and business owners across the U.S.



"Aprio Legal is a true game-changer. Our clients now have access to an even more robust scope of resources that empower them to scale, grow, and thrive across emerging legal landscapes. No other firm offers this capability."

Andy Kvesic, JD
CEO, Aprio Legal | Partner,
Aprio Advisory Group, LLC

Aprio Legal By the Numbers

10+	LEGAL SPECIALTIES
16	ATTORNEYS
600+	CLIENTS SERVED IN 2025



"Our holistic approach to advisory services differentiates us in the marketplace and drives our impact. We continue to broaden our capabilities to deliver the seamless, multi-generational financial stewardship for our clients."

Keith Greenwald
CEO, Aprio Wealth Management |
Partner, Private Client Services

Strengthening our advisory service capabilities, we invested in key talent to support our long-term vision. Our team now includes leaders, advisors, and specialists from top-tier firms with experience in delivering high-impact solutions to ultra-high-net-worth clients.

With new leadership and expanded insights, we are accelerating our vision for Aprio Wealth Management – one where collaboration, accountability, and proactive planning come together to anticipate client needs and align financial decisions with broader goals.

Aprio Wealth Management Anticipating Client Needs

42 TOTAL TEAM MEMBERS

18 ADVISORS

16 NEW TEAM MEMBERS

85% CLIENT GROWTH

New Talent Joining Aprio Wealth Management



Eric Flynn, CFA[®], CPA
Chief Wealth Officer



Chris Guinther
Senior Wealth Advisor



Randy Loving, CFA[®]
Senior Wealth Advisor



Noah Marell, CFP[®]
Chief Operating Officer



Erin O'Connor-Bell, MS, CFP[®]
Wealth Director, Financial Planning
and Client Experience, Wealth
Operations



Jandy Rowe
Client Service Operations and
Integrations, Wealth Operations



Dan Wilson, CFP[®]
Director, Corporate Development,
Corp M&A



Tim Shmidl, CFP[®], CRPC
Partner



**Charlie Koch, MBA, CFP[®],
CPWA[®]**
Partner



Nate Checketts, Co-Founder and CEO of Rhone

Rhone makes an impact by fostering mental fitness and community connection while delivering high quality, innovation driven activewear designed to support lasting personal progress.



Rhone is a performance apparel company featuring fabrics and fits that perform under pressure and support every step of the journey. Since its founding in 2014, the company has experienced incredible growth, pushing innovation, forming new partnerships, and building a global community of loyal customers.

During its early stages of growth, Rhone needed a financial and accounting resource that could keep things running smoothly so it could focus on managing the business. In Aprío, Rhone found a true partner that

enables it to run fast and grow the business the way they want – without obstacles.

The Aprío team is invested in Rhone’s success. It’s a partnership built on understanding Rhone’s business, goals, and the complicated, nuanced retail apparel space in which it operates.

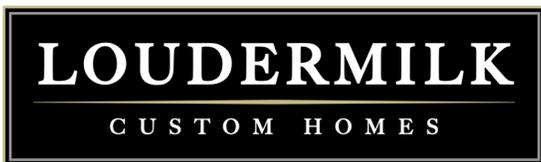
Beyond managing Rhone’s GAAP accounting and supporting its NetSuite integration, the Aprío team collaborates, troubleshoots, and proactively shares suggestions based on its industry experience. Equally important for Rhone is the trust and confidence that come from working with a consistent Aprío team.

“What’s unique about Aprío is they consistently go beyond the scope of work and identify opportunities to grow our business. That’s what a true partner is.”

Nate Checketts
Co-Founder and CEO | Rhone



*Sherwin Loudermilk, Founder and CEO of Loudermilk Custom Homes
Loudermilk Custom Homes makes an impact by elevating Atlanta and Western North Carolina communities with innovation-driven, meticulously crafted luxury homes built through its signature 9 Step Process to Perfection.*



Loudermilk Custom Homes is a custom luxury design and build firm operating in Atlanta, Georgia and Cashiers, North Carolina. The company's strong reputation is rooted in a "Build It Like It's Yours" mantra, which is brought to life through a nine-step "Process to Perfection."

Founder and CEO Sherwin Loudermilk was on the hunt for a tax consultant that could do more than just file taxes; he needed one that would help restructure the company to operate more efficiently. Sherwin interviewed half a dozen firms, but when he met the team at Aprio, he knew he found the right partner.

"The team just got it," says Sherwin. "They immediately understood what we were trying to accomplish and asked all the right questions. Once we got started, they began uncovering gaps and simple mistakes and proactively guided me through the restructuring process. I'm used to having to micromanage other consultants, but not with Aprio."

Building on a solid foundation, Sherwin is now entrusting the Aprio team with more of his business needs, including tax, accounting, potential capital investments, and even some controller responsibilities. For Sherwin, it's a level of partnership that includes quick phone calls seeking advice or simply talking through an issue.

"It's so refreshing to know I have the right team in place so I can redirect my attention towards other areas that will drive new business for me," says Sherwin. "For the first time, I feel like someone really has my back."

"The team just got it. They immediately understood what we were trying to accomplish and asked all the right questions."

**Sherwin Loudermilk
Founder and CEO | Loudermilk Custom Homes**



The Red Carpet Treatment

Commercial Roofing Specialties makes an impact by delivering unmatched service, deep industry expertise, and reliable access to quality roofing materials across the Southeast.



Larry Burns founded Commercial Roofing Specialties (CRS) in 1981 with a goal of supplying the best materials and supplies to the best contractors. What started as a manufacturer's rep firm focused on the promotion of single-ply roofing materials quickly grew into a regional commercial and residential distribution business with locations across Georgia, Tennessee, and Florida.

Larry passed away in 2024, but his son Brett and daughter Caroline, along with more than 200 employees, continue to carry out his mission of being the finest independent roofing distribution company in the Southeast.

"It's been an unusual year for us navigating the death of our founder and my father," says Brett Burns, who now serves as President. "The team at Aprio has guided us through the tax implications and restructuring and have done so with a compassionate, human element."

CRS originally engaged Aprio in 2019 for audit and tax services after growing frustrations with its previous accounting firm and their lack of personalized service. "From day one Aprio has been a tremendous change for the better," says Brett. "The quality of the service that we receive has been absolutely superb. We feel like we receive the red carpet treatment with each interaction."

Brett says because CRS runs a lean organization with a relatively small accounting staff and executive leadership team, there are a lot of balls in the air. Having Aprio provide timely, accurate information instills trust and confidence.

"There was a time when I was concerned that Aprio's growth would impact the level of service they provide," says Brett. "But I'm happy to say that in every possible instance those fears have proven to be unfounded. Aprio knows our business and our culture, they understand our customers and our vendors, and they consistently look out for the best interest of our company."

"Working with Aprio has allowed us to rest easy knowing that everything we expect to be taken care of is being addressed to the standard that we require."

Brett Burns
President | Commercial Roofing Specialties



Nick Twilley, Controller of Clarity.

Clarity Innovations makes an impact by delivering mission-focused software and data engineering solutions that turn complex defense and intelligence data into actionable, real-time insights.



Clarity Innovations is a trusted national security partner delivering innovative software, data engineering, and mission-critical solutions in support of the U.S. Department of Defense (DoD), Intelligence Community (IC), and federal agencies.

Through modern solutions, architecture, and high-quality, mission-focused interfaces, Clarity connects users with the information they need to make informed decisions and execute complex missions. As a leader in Information Warfare, Cyber Operations, Operational Security, and Data Structuring, Clarity provides end-to-end capabilities that safeguard national interests and drive mission success in an evolving security environment.

With expertise in planning and architecting complex systems in multi-vendor and multi-customer ecosystems, Clarity needed its own multi-faceted partner with a wide breadth of industry experience – from system strategy and optimization to outsourced accounting, compliance, and integration. The company engaged Aprio's integrated government

contracting and technology advisory teams to help strengthen its operational and financial infrastructure.

According to Clarity Controller Nick Twilley, the company had a host of challenges that required immediate attention. Working with the Aprio team, they prioritized the list and began resolving them one by one. "Since engaging Aprio, Clarity has been able to level up our systems and processes," says Nick. "We've moved from a reactive phase where we addressed all our fire-drill issues and pain points to a more proactive phase where we are now planning for new future growth." This transformation included optimizing their Unanet system and aligning project operations, financial management, and compliance processes into a more unified environment designed for government contractors.

Clarity is continuing its growth trajectory with a fully optimized system that can scale with the company. "We've gained so much peace of mind over the past year working with Aprio," says Nick. "It's a partnership where the team really understands our company and our system. They offer a unique combination of system, accounting, and compliance knowledge and have a real-world understanding of where we are and where we want to go. There's no one better than Aprio for this kind of support."

"With Aprio's sound guidance and partnership, we are entering our next phase of growth with confidence, supported by systems and processes that are built to scale and adapt to the increasing complexity of our financial operations."

Heeun Gardner
Chief Financial Officer | Clarity Innovations



2025 Acquisitions Transforming the Client Experience

We are growing so our clients can grow. Aprio continues our rapid growth trajectory, acquiring 16 firms in 2025. These combinations are enriching our client experience, expanding our footprint in markets across the U.S., and building new capabilities.

KRD, Ltd.

KRD, Ltd., provides financial, wealth planning, assurance, tax, consulting, and outsourced accounting services for high-net-worth families, businesses, and other organizations. This acquisition establishes our presence in Chicago and represents a new market for Aprio.

Burkett & Beattie, Inc.

Burkett & Beattie provides full-service accounting and tax services for small, growing businesses, with a focus on health clubs, marketing research, and veterinary hospitals. This acquisition reinforces our commitment to serving the Midwest market, including Chicago – one of the fastest-growing business hubs in the U.S.

Nardone, Pridgeon & Company, P.A.

Baltimore-based Nardone, Pridgeon & Company provides highly personalized accounting, tax, and advisory services, with a focus on high-net-worth families and real estate. This acquisition strengthens our growing Mid-Atlantic presence and ability to serve clients across the region.

Mangold Anker Phillips, PLLC

Mangold Anker Phillips is a tax, accounting, and business advisory services firm based in Austin, Texas. This acquisition builds upon our existing presence in Austin, adds new capabilities, and positions us to deliver even greater value to clients across the region.

JMS Advisory Group, LLC

JMS Advisory Group is an Atlanta-based firm specializing in unclaimed property compliance and escheat process development and improvement, serving clients across more than two dozen industry segments. This acquisition adds unclaimed property compliance capabilities to our service portfolio along with expanded advisory resources.

Professional Services+ Practice

Professional Services+ Practice serves almost 80 firms across the U.S. and Canada with resources and advisory services related to strategy and leadership, talent development, business processes and operations, and access to group-buying solutions. This acquisition brings a robust community of complementary firms with unique opportunities for collaboration and growth.

SND Partners, LLP

SND Partners is a San Francisco Bay accounting firm specializing in Affordable Housing Tax Credit and Housing and Urban Development audits. This acquisition allows Aprio to scale our capabilities and serve a broad range of for-profit and nonprofit organizations across real estate and community development sectors.

Radix Law

Aprio and Radix Law, a full-service business law firm based in Scottsdale, Arizona, joined together as Aprio Legal, LLC, a full-service, Alternative Business Service (ABS) law firm serving entrepreneurs and business leaders with a holistic approach. This strategic collaboration offers clients a one-stop destination to address business and legal challenges with forward-thinking solutions.

Nextfed, Inc.

Virginia-based Nextfed is a premier strategy consulting and M&A advisory firm with deep experience in the commercial aerospace, defense, and government services sectors. The acquisition strengthens Aprio's ability to serve clients in these sectors and expands our presence in the Washington D.C. area.

O'Connor Consulting Services, LLC

Based in the Washington D.C. area, O'Connor Consulting Services specializes in nonprofit business advisory and interim outsourcing services. The acquisition gives Aprio the ability to deliver high-impact, business advisory services to mission-driven organizations.

Sandler & Company, P.C.

Sandler & Company is a boutique CPA firm based in Boston, Massachusetts. This acquisition doubles Aprio's financial services capabilities and strengthens our ability to serve hedge funds, real estate funds, private equity firms, broker-dealers, and investment advisors.

DeFalco & Co, CPA

New Jersey-based DeFalco & Co, CPA, provides a full suite of services, including tax planning and preparation, business accounting and advisory, estate and trust consulting, and litigation support. This acquisition aligns with our focus to serve the New York Metro area's middle-market businesses, entrepreneurs, and high-net-worth individuals with expanded solutions.

Mize CPAs Inc.

Mize CPAs is a Kansas-based accounting and advisory firm best known for being the largest accounting and payroll services provider to McDonald's Owner/Operators. The firm also has deep experience in construction, manufacturing and distribution, and auto dealership industries. This acquisition enables Aprio to support even more brands across the industry and deliver greater value to franchisees as they grow.

Prism Financial Group LLC

Mize CPA affiliate Prism Financial Group is a wealth management firm based in Kansas, providing financial planning and investment advice to high-net-worth individuals, business owners, and franchisees across 42 states and managing \$1.8 billion in assets. Prism joins Aprio Wealth Management to provide fiduciary-based financial planning and investment management services.

Growth Starts Here

Aprio is the go-to partner helping clients of all sizes and industries operate, compete, scale, and achieve next-level success.

In 2025, we expanded our capabilities through strategic combinations to include artificial intelligence (AI) automation, digital transformation, legal services, unclaimed property compliance, and an alliance program serving accounting firms. Combined with our existing experience, partnerships, and resources, these added capabilities establish us among the most dynamic professional service providers in the world.

AI and Digital Transformation

Aprio is building an AI-enabled firm that delivers smarter, faster, and more valuable services. In addition to a five-year, \$300 million investment in AI and automation, we expanded our capabilities in intelligent automation across our audit, tax, legal, technology, and advisory practices.

Aprio Legal

With the launch of Aprio Legal, we became the first business advisory and accounting firm to deliver fully integrated legal, tax, accounting, wealth management, and advisory solutions. This multi-disciplinary approach streamlines access to strategic counsel, operational insight, and financial guidance.

Unclaimed Property Compliance

Aprio added unclaimed property compliance and escheat process development and improvement to our service portfolio, serving clients across more than two dozen industry segments.

Aprio Alliance

Aprio Alliance provides growth-oriented accounting firms with expanded access to our advisory resources, including technology guidance, leadership and career development programs, member-only events, data-driven financial insights, and an exclusive resource platform.

INDUSTRIES SERVED

- Aerospace, Defense & Government
- Auto Dealership
- Construction
- Dental
- Financial Services
- Franchise Owner/Operators
- Healthcare
- Housing: Affordable & Authorities
- International
- Manufacturing, Distribution & Consumer Products
- Nonprofit
- Private Client
- Private Equity
- Professional Services
- Real Estate
- Restaurant, Franchise & Hospitality
- Technology

APRIO SERVICES

- Advisory
- Audit
- Client Accounting Services
- Escheat Process Development And Improvement
- Federal Disruption
- International Business Services
- Legal
- Private Client
- Talent Solutions
- Tax
- Unclaimed Property Compliance
- Wealth Management



US LOCATIONS

<p>AL</p> <p>Birmingham Birmingham West</p>	<p>AZ</p> <p>★ Scottsdale</p>	<p>CA</p> <p>Los Angeles ★ San Francisco Walnut Creek</p>	<p>CO</p> <p>Denver</p>	<p>DC</p> <p>Washington, D.C. Metro Area</p>
<p>FL</p> <p>Fort Lauderdale</p>	<p>GA</p> <p>Alpharetta Atlanta Conyers Valdosta</p>	<p>IL</p> <p>★ Chicago Libertyville Schaumburg</p>	<p>KS</p> <p>★ Overland Park ★ Topeka</p>	<p>MA</p> <p>Dedham</p>
<p>MD</p> <p>★ Baltimore ★ Bethesda</p>	<p>NC</p> <p>Asheboro Charlotte Greensboro Mooresville Mount Airy Raleigh</p>	<p>NJ</p> <p>★ Hoboken Little Falls Scotch Plains</p>	<p>NV</p> <p>Reno</p>	<p>NY</p> <p>New York</p>
<p>OR</p> <p>★ Lake Oswego ★ Portland</p>	<p>TN</p> <p>Nashville</p>	<p>TX</p> <p>★ Austin Dallas Houston San Anotnio</p>	<p>VA</p> <p>★ Arlington</p>	



Growth Through Collaboration

Aprio unified our Firm Alliance and Professional Services+ (PS+) practices to create the Aprio Alliance — a new growth community providing professional development designed for accountants, by accountants.

The Aprio Alliance brings accounting leaders together around shared learning, best practices, and business performance. Comprising nearly 90 independent accounting firms across the U.S. and Canada, we offer curated resources and tailored insights not accessible anywhere else — from an expansive peer network and technical proficiency to professional development and industry-leading tools and templates.

This unique combination of collaboration, connection, and curriculum builds a thriving community empowered to tackle complex business challenges and address the most pressing issues facing accounting firms today.

“Aprio Alliance is about driving member growth and success, offering more collaboration, more resources, and more opportunities for every firm in the community.”

Dean Sengstock, CPA
Aprio Alliance | Partner and Leader

“The network of alliance member firms in both Canada and the U.S. represents an impressive cross-section of our industry, and our entire leadership team gains valuable insights and strategies through our interactions with member firms. We appreciate the hard work and professionalism of the entire Aprio Alliance team, who always strive to create top-tier conferences, leadership training, and other member experiences.”

Jeremy Hansen

Firm Managing Partner | Virtus Group, LLP

“Aprio Alliance has been a pivotal part of my growth as a managing partner and has strengthened how our firm thinks about strategy. The Canadian MP group, the leadership conference, and my monthly coaching have each given me clearer perspective, stronger judgment, and new ways to approach the issues and growth at Avail.”

Scott Rowland

Managing Partner | Avail, LLP

“HSC has been deeply embedded in this community for well over 30 years. The relationships between us, the Alliance team, and the rest of the Alliance members are real and bring value to us. With it comes insights, ideas, cost savings, best practices, and the list goes on. We are a better firm as a direct result.”

Scott Olinger

CEO | Harding, Shymanski & Company, PSC

“LGA is honored to be a part of such a strong group of like-minded entrepreneurial member firms who are on similar journeys and equally value collaboration. We embrace the uncertainty of the future of our industry knowing we have the support of an amazing community.”

John Geraci

Managing Partner | LGA, LLP

Aprio Alliance By the Numbers

100

MEMBER FIRMS
RANGING IN SIZE FROM
START-UP TO MARKET
LEADERS

30

VENDOR PARTNERSHIPS

\$1.5B

COMBINED REVENUE

180+

COMMUNITY
PROGRAMMING
EVENTS

15+

INDUSTRIES
REPRESENTED

5

LEADERSHIP AND
DEVELOPMENT
PROGRAMS

Partnering with Intuit

In 2025, we expanded with new partnerships, including a unique collaboration with Intuit. Aprio is the first to partner with Intuit to offer AI-powered solutions and services that meet the needs of large accounting firms and simplify how mid-market businesses operate and scale.

Boundless Benefits

- Drive growth, efficiency, and profitability for shared mid-market clients
- Deliver tailored customer experiences, industry-specific workflows, and dynamic insights
- Transform how complex, mid-market businesses grow, eliminating the need for costly, legacy ERPs, or multiple applications to manage operations

Primary Industries Served

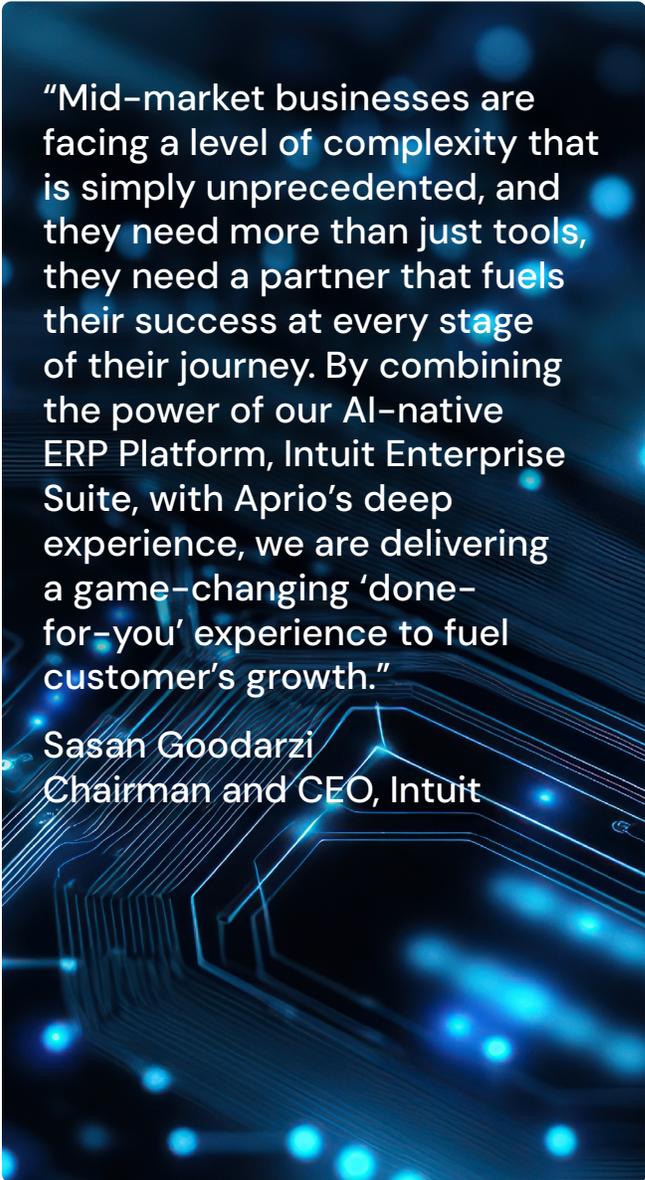
- Construction
- Healthcare
- Technology
- Private Equity

Through our partnership with Intuit, Aprio is able to better serve the evolving needs of our clients by aligning advanced technology with hands-on advisory support. As businesses grow in complexity, they need more than software — they need systems that connect financial data, operations, and strategy. Together, Aprio and Intuit provide clients with a unified, AI-powered platform backed by advisors who understand how to turn information into action.

Clients benefit from a guided approach that goes beyond implementation. Aprio works alongside leadership

teams to evaluate systems, manage migration, configure industry-specific workflows, and continuously optimize processes as the business evolves. This ensures the technology environment supports better visibility, stronger financial management, and smarter decision-making at every stage of growth.

By reducing system fragmentation and manual work, clients can focus more time on running and expanding their businesses. The combination of intelligent automation and Aprio's advisory insight helps organizations operate more efficiently, gain deeper profitability insights, and build a scalable foundation that supports long-term success.



“Mid-market businesses are facing a level of complexity that is simply unprecedented, and they need more than just tools, they need a partner that fuels their success at every stage of their journey. By combining the power of our AI-native ERP Platform, Intuit Enterprise Suite, with Aprio’s deep experience, we are delivering a game-changing ‘done-for-you’ experience to fuel customer’s growth.”

Sasan Goodarzi
Chairman and CEO, Intuit

The Aprio Way, Every Day

Aprio is committed to always doing right by our clients. We take the time to understand their business, industry, challenges, and opportunities, so we can Account for Anything™. Rooted in experience and executed with a partnership mindset, our people-focused approach drives results and tailored client solutions.

No Unanswered Questions

Proven proactive counsel that helps clients grow their business.

No Unwarranted Delays

Timely access to all the services, solutions, and support our clients need to move fast and reach their goals.

No Unfriendly Faces

Deep engagement from experienced advisors who know their client's business and care about their success.

“*Our experience has been outstanding. The Aprio team provides a comprehensive suite of tax services with strong communication, fair pricing, and excellent execution. We've worked with the across several distinct workstreams and now feel significantly more confident in our income and sales/use tax compliance.*”

Bombas



Aprio was recognized with an Inc. Magazine Power Partner Award. This annual list honors B2B organizations recognized by their clients for making a difference in their growth and success. As trusted advisors for our clients, we're committed to a fully integrated approach that helps businesses navigate challenges and scale operations.

Our Commitment to Quality

Quality at Aprio goes beyond compliance — it is central to how we serve clients across every engagement. As our firm grows, we continue to enhance the systems, processes, and professional standards that ensure our work meets the highest levels of accuracy, integrity, and impact. This approach allows our teams to move beyond routine checklists to deliver guidance that is proactive, forward-looking, and tailored to each client’s evolving needs.

In 2025, new technology tools and integrated workflows strengthened Aprio’s quality environment, providing greater transparency, consistent oversight, and earlier risk identification while reducing manual processes. These quality controls are designed not only to uphold regulatory and ethical standards, but also to drive stronger client outcomes — enabling teams to uncover actionable insights, anticipate challenges, and deliver guidance that helps clients achieve their goals.

“At Aprio, quality is not just a standard, it’s our promise to every client. We build systems and processes that anticipate challenges, uncover opportunities, and deliver guidance that transforms results. Our goal is to redefine what exceptional service looks like, ensuring every engagement drives meaningful impact and positions our clients for sustainable growth.”

Michael Lange
Audit Leader | Aprio



Building an AI-Enabled Firm

Aprio is making bold investments in the promise of artificial intelligence to fundamentally reshape how we work.

AI is key to delivering smarter, faster, and more valuable solutions, and Aprio is embarking on a bold strategy to build an AI-enabled firm. Fueled by a five-year, \$300 million investment, our AI and automation strategy is designed to enhance human intelligence, impacting the client and team member experience by improving accuracy, accelerating turnaround times, and freeing our professionals to focus on high-value work and client engagement.

Aprio Acquires TimeCredit

As part of our growing portfolio of AI investments, Aprio acquired TimeCredit, known for its AI-enabled automation platform that enhances accuracy and speed in accounting workflows. This platform, along with other advanced AI tools, will assist with everything from drafting documents and analyzing legal content, to automating research, summarizing complex information, and streamlining workflows.

“Our AI strategy doubles down on our belief that technology, when paired with the best people, can reshape the future of professional services.”

Richard Kopelman
CEO | Aprio

“By embedding intelligent automation into everything we do, we are unlocking faster, smarter insights for our clients and redefining what a high-impact experience looks like for our team.”

Brent McDaniel
Chief Digital Officer | Aprio

Aprio’s AI Council is the governing force behind our AI transformation. This cross-functional leadership group aligns technology investments with business strategy and client needs to build a more agile, responsive organization to help our clients grow.

Compassion and Commitment

At Aprio, we are hard-wired to make a difference. It's a mindset that extends well beyond the walls of our offices and into the communities we serve. Through volunteerism, in-kind donations, and long-term nonprofit partnerships, we are intentional and passionate about creating a positive social impact.

Aprio Foundation

Since 2022, the Aprio Foundation has supported 70 nonprofit organizations, leveraging employee-nominated funding to connect purpose with action and drive community impact.

The Aprio Foundation empowers team members to support their communities in ways that are meaningful to them. The employee-led organization funds nonprofits that align with Aprio's social mission, value inclusion, prioritize volunteerism, and focus on education, entrepreneurship, the environment, and supporting the economically disadvantaged.

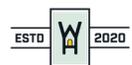
In 2025, we awarded \$393,500 Community Impact Grants to 66 nonprofit organizations across the U.S. – the most organizations supported with a grant to date. These change-makers are tackling important community issues with creativity and compassion – and our communities are stronger because of them.

\$393,500
supporting 66 nonprofits

“Each organization we support is a beacon of hope, whether lifting families, empowering youth, or creating pathways to access and opportunity. These grants are more than financial support; they are a promise that we stand with those driving meaningful change and building stronger communities.”

Michele Blondheim
Vice President, Corporate Social Responsibility | Executive Director,
Aprio Foundation





Empowering Entrepreneurs

Teneka Williams is the founder of Royal Petals ATL, a flower shop located in Southwest Atlanta. Royal Petals is not your typical florist – it is a vibrant movement to uplift each other through the power of florals. Early in her professional journey, Teneka realized she needed more than just a passion to serve the community for her business to survive.

That’s where the Building Resilient Entrepreneurs (BRE) Pilot Program came in.

A collaborative partnership between Aprio, the United Way of Greater Atlanta, The UPS Foundation, and Truist Small Business Banking, BRE is designed to address the challenges faced by underrepresented small business owners in the Atlanta area, along with other fundamental business elements, including retirement planning, insurance, and other financial essentials.

With invaluable input from Aprio’s Black Business Forum, the BRE Pilot Program welcomed 15 small business owners in September 2024 who participated in a six-month journey of business development workshops, access to valuable resources, mentorship, and networking opportunities, as well as a 1:1 match of up to \$1,500 in savings.

The pilot program culminated with eligible entrepreneurs participating in the Spark Prize Pitch competition, where they had the chance to win up to \$7,500 in additional capital. Teneka placed first in the Spark Prize Competition and received the Fan Favorite Award.

Following this successful launch, Aprio is scaling the BRE program in 2026 to focus on the restaurant, franchise, and hospitality industry. With input from our Aprio professionals in this space, the expanded program will support entrepreneurs with industry-specific curriculum, resources, and guidance to help them build thriving operations.



“This was a solid combination of both personal and professional development. When you really pull back the layers of what we created, we provided tools not only for the business owners and entrepreneurs’ benefit, but for the individual as well.”

Michele Blondheim
Vice President, Corporate Social
Responsibility | Executive Director,
Aprio Foundation

Aprio’s IMPACT

Aprio was recognized with the IMPACT Corporate Innovative Project of the Year Award for our Building Resilient Entrepreneurs (BRE) Program. In partnership with the United Way of Greater Atlanta, the program directly supports underrepresented small business owners with mentorship, funding, and resources, and is one of the many ways Aprio team members are Making a Difference. The honor was presented at the 28th Annual Corporate Volunteer Council of Atlanta (CVC) Impact Awards, which recognizes companies that successfully utilize their team members’ skills to support a nonprofit or community partner.

A Tangible IMPACT

In addition to our year-round volunteer efforts, Aprio team members in the U.S., Colombia, and the Philippines mark their calendars each November for an entire week of IMPACT. Community IMPACT Week is our annual volunteer campaign where we take our #Make a Difference Fundamental global, creating meaningful, positive impact across the communities and organizations we passionately support.

Whether volunteering solo, with Aprio colleagues, or rallying friends, family and clients, our team members show up and show out, collectively participating in volunteer projects across the U.S. and around the world. This year marked our largest impact yet with more volunteers, more hours, and more organizations supported.



IMPACT By the Numbers

40+ SERVICE PROJECTS

679 TEAM MEMBERS VOLUNTEERING

1,658 HOURS VOLUNTEERED

52 NONPROFITS SUPPORTED

“The Aprio volunteer shirt represents more than a day of service; it represents our shared commitment to show up, give back, and use our time and talents to support the communities we’re part of. Wearing it is a reminder that even small actions, when done together, can create real impact.”

Dominique Hatzenbuehler
Senior Accounting Associate

“Working for an organization that values community involvement is incredibly important to me. I have always aspired to have a job where I can make a meaningful impact, and Aprio provides that opportunity. Through various volunteer initiatives, I feel empowered to contribute positively and make a difference in the community.”

Joe Raymond, CPA
Senior Associate | Audit Services

“IMPACT Week brings our values to life. There’s incredible energy as Aprio team members come together with purpose, generosity, and heart—stepping outside their day-to-day roles to serve our communities. It’s a powerful reminder that leadership shows up at every level, and when we give our time and talents with intention, our impact reaches far beyond the office.”

Melissa Werner
Director, Audit Services

“My volunteer impact means finding and creating the good I want to see in the world. It is inspiring to see firsthand all the good our local nonprofits do for members of our community, and it is incredibly uplifting to help uplift others.”

Brooke Weeks
Manager | Audit Services | Real Estate

Funding the Food Fight

Each year, Aprio team members join together to help put food on tables during the Georgia Society of CPAs (GSCPA) and Feeding Georgia's Annual Accounting Food Fight. This two-week campaign encourages employees to donate much-needed funds in support of local food banks and pantries across our footprint.

This year marks our largest turnout yet as we surpassed our \$30,000 goal, raising \$31,257.77 to provide over 115,000 meals to families in need. Aprio donated an additional \$5,000 to the Atlanta Community Food Bank, and Client Accounting Services Practice Leader and Partner Nicole Mitchell contributed her \$1,000 industry recognition award from the Celebration of Women in Accounting to the Food Bank of Maryland. What's more, a client in the northeast joined the effort with a \$10,000 donation to the Community Food Bank of New Jersey, significantly expanding our campaign's reach and impact.

Aprio Accounting Food Fight By the Numbers

47M AMERICANS FACING HUNGER

\$47,258 TOTAL RAISED

140,000+ MEALS PROVIDED

15 LOCAL FOOD BANKS SERVED BY APRIO VOLUNTEERS



Earth Day in May

Because April is a busy month for financial services, Aprio supports environmental community partners across the globe during an entire week in May. Earth Day in May is our chance to roll up our sleeves, get our hands dirty, and make a noticeable difference in our communities by helping to clean up and beautify parks, gardens, farms, preserves, and nature centers.

Earth Day in May By the Numbers

256 TEAM APRIO VOLUNTEERS

608 VOLUNTEER HOURS

21 ORGANIZATIONS SUPPORTED



A Workplace Where People Thrive

Aprio knows that when people feel supported in every aspect of life, they do their best work. Our people-first culture is rooted in this very idea and fostered through intentionally designed programs focused on health, wellness, and career development.

The cornerstone of our culture is “The Aprio Way” – 31 behaviors for how we support each other and our clients – with kindness driving every interaction. These guiding principles are as empowering as they are motivating, providing a solid foundation from which we grow as individuals and as a firm.

The Aprio Way

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

Aprio Health & Wellness

Aprio’s health and wellness strategy is about attracting, developing, and retaining top talent by fostering an environment where team members feel strong, healthy, balanced, and empowered.

In addition to offering a quality benefits package, we continue to invest in new programs that deliver a full spectrum of wellness options, including everything from physical fitness initiatives and mental health support to health coaching, hybrid flexibility, and personalized well-being resources.

And, we make it easy for our team members to access their many benefits through Personify Health, a one-stop-shop digital resource designed to create positive lifestyle changes through healthier habits.

Inspired Learning

Aprio team members are life-long learners. It’s how we grow professionally, impact the industry, and better serve our clients. We offer team members access to 365 professional development programs throughout the year – an investment that consistently ranks 40% above the industry average.

In 2025, Aprio further reinforced our commitment to development with the launch of Aperture – an inaugural week of learning designed to ignite growth, insight, and connection across the firm. Team members chose from different CPE-eligible sessions aligning with their specific goals – all featuring knowledgeable facilitators, dynamic content, and flexible registration via the Aprio Learning Hub.

“Our culture is a direct reflection of our values. By prioritizing our people, investing in quality benefits, and fostering an environment where everyone feels supported and empowered, we bring our best selves to work and deliver more for our clients.”

Carolyn O’Boyle | Chief People Officer

Top Workplaces USA Today Award

For the second consecutive year, Aprio has been honored with the Top Workplaces USA Today award, recognizing the firm as one of the country’s leading employers. Presented by USA Today and Energage, this award reflects direct employee feedback and highlights organizations that excel in culture, alignment, and overall team member experience.



APERTURE

Aprio Learning Week
Developing Minds. Sharpening Vision.



A Culture of Success

31

THE APRIO WAY
CORE TENANTS

365

PROGRAMS AND
COURSES OFFERED

10,466

LINKEDIN LEARNING
HOURS

83

MENTORS

45,973

CONTINUING
PROFESSIONAL
EDUCATION CREDITS
THROUGH APRIO-
MANAGED COURSES

Insights at Your Fingertips

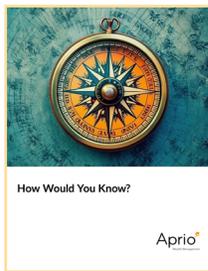
Working across industries, practices, and client segments offers unique perspectives and big-picture insights. At Aprio, we contextualize and share these findings through targeted white papers, videos, webinars, podcasts, and surveys, ensuring our clients have the relevant data and understanding needed for long-term planning and strategic decision-making.

In 2025, our team delivered hundreds of resources, including 350+ pieces of thought leadership and 100+ webinars and in-person events combined, providing valuable financial, tax, and operational guidance with high levels of client engagement.

Top 5 Aprio Insights



2025 END OF YEAR
TAX UPDATE



2025 ECONOMIC
OUTLOOK



WHAT IS THE ONE BIG
BEAUTIFUL BILL (OB BB)?
AN OVERVIEW

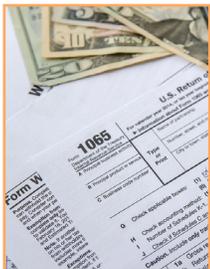


2026 MANUFACTURING
PLAYBOOK: ADAPTING
TO DISRUPTION AND
INNOVATION

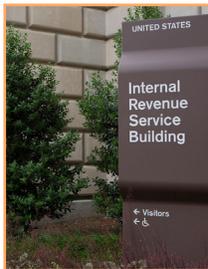


TECHNOLOGY OUTLOOK
2025: PIONEERING THE
NEXT WAVE OF DIGITAL
TRANSFORMATION

Aprio's 5 Most-Read Articles



UNDERSTANDING
SCHEDULE K-1: A GUIDE
TO TAX FORM 1065



A MAJOR LAWSUIT
AGAINST THE IRS: WHY
YOUR ERC CLAIM STATUS IS
TAKING SO LONG



WHAT TRUMP'S ONE
BIG BEAUTIFUL BILL
MEANS FOR INDIVIDUAL
TAXPAYERS



SIGNED INTO LAW: KEY
TAKEAWAYS FROM THE
ONE BIG BEAUTIFUL BILL



IRS ISSUES NEW GUIDANCE
ON ERC CLAIMS

Aprio Top Webinars



UNPACKING THE ONE BIG BEAUTIFUL BILL: NAVIGATING THE IMPACT ON BUSINESSES AND INDIVIDUALS



INCURRED COST SUBMISSIONS



PREPARING YOUR BUSINESS FOR EXIT: A PRACTICAL GUIDE FOR FOUNDER-LED AND CLOSELY HELD GOVERNMENT CONTRACTORS



CUSTOMS & TARIFFS: WHAT TO CONSIDER FOR YOUR BUSINESS



WHAT'S NEXT: R&D TAX CREDITS & SECTION 174 UPDATES



APRIO'S 2025 REAL ESTATE ECONOMIC OUTLOOK

Awards

Our list of awards is as long as it is varied, but they all point to one thing – Aprio is among the most respected firms in the professional services industry.





2025 Inc. Power Partner Awards

Aprio was named to the Inc. Power Partner list for 2025, which honors B2B organizations recognized by their clients for making a meaningful difference in their growth and success. Recipients include companies across industries that consistently go beyond just delivering services to act as trusted advisors, helping businesses navigate challenges, scale operations, and achieve measurable growth.



Vault's Top 150 Internships List for 2026

Based on thousands of responses from current and former interns across industries, Aprio earned the No. 12 spot for our investment in building the next generation of accounting and advisory leaders. We also ranked among the top 10 best internships for accounting and quality of life and were recognized for inclusion, reflecting our people-first culture and commitment to creating an environment where every team member can grow, connect, and thrive.



Inc. 5000 List of Fastest-Growing Companies

Aprio ranked No. 2,312 on the 2025 Inc. 5000 list of fastest-growing private companies nationwide. This marks our third consecutive appearance on the list, highlighting our momentum as we scale nationally through strategic acquisitions, talent investment, and the expansion of its advisory services.



Construction Executive's 2025 Top 50 Construction Accounting Firms™

Aprio earned the No. 20 spot on Construction Executive 2025 List of the Top 50 Construction Accounting Firms based on a comprehensive survey of more than 700 U.S. accounting firms.

This marks the fifth consecutive year we have been honored, highlighting our ongoing commitment to serving the evolving needs of construction clients.



Accounting Today's 2025 Wealth Magnets

Aprio Wealth Management was named to Accounting Today's 2025 Wealth Magnets list, which ranks the leading CPA-affiliated firms by assets under management. With more than 200 firms submitting for consideration, the list reflects the growing demand for strategic financial planning services led by CPAs and recognizes firms that are shaping the future of wealth management in the accounting profession.



Top Workplaces USA Today Award

Aprio was recognized by Energage with the Top Workplaces USA Today award for the second consecutive year. Winners are chosen based on employee feedback gathered through an employee engagement survey, issued by Energage. Results are calculated by comparing the survey's research-based statements to predict high performance against industry benchmarks.

Building the Next Chapter of Leadership

Aprio continues to add leadership and experience to our team, including 15 new team members in 2025. In addition to their aptitude across key growth industries, these professionals embody Aprio values, our commitment to transformation, and dedication to client service.



Neal W. Beggan, CISA, CRISC, CMMC–RP
National Advisory Services
Leader, Partner



Caroline Claiborne
Chief of Staff,
Office of the CEO



Allie Colman, CPA, MST
Northeast Technology
Leader, Tax Partner



Jim Cordova
Southern California Market
Leader, Tax Partner



Elie Doft
Securitization and
Structured Products Audit
Partner



Eric Flynn, CFA®, CPA
Chief Wealth Officer | Aprio
Wealth Management



Jon Klaus, CPA
Real Estate Client Accounting
Services Partner



Brad Leffler, CPA
Southwest Audit – Market
Area Lead, Partner



Jason Lipschultz, CPA, CISA
Midwest Technology Industry
Leader, RAAS Partner



Travis Miskowitz
Client Accounting Services
Outsourcing Partner



Nathan Robnett, CPA
Insurance Services Audit
Partner



Carolyn O'Boyle
Chief People Officer



Marc Silverman, JD, LL.M
Go-To-Market Leader,
Partner



Nuwandi Trahan, CPA
Southwest Real Estate Leader,
Audit Partner



Dasha Walker, CPA
Commercial Real Estate Audit
Partner

In the Spotlight

In an industry full of talent, Aprio professionals are widely respected for their specialized knowledge and strategic insight. We are honored to be recognized among our peers and to serve in leadership positions that reflect the counsel we provide and the impact we deliver.

Forbes Best-In-State CPAs and Top 200 CPAs

Forbes recognized eight Aprio leaders on its 2025 America's Best-In-State CPAs and America's Top 200 CPAs list, who were recognized for their innovation, thought leadership, experience, and service to the community and to their profession.



Richard Kopelman,
CPA, CGMA
CEO



Lexy Kessler, CPA,
CGMA
Audit Partner and
Chair of the AICPA



Yelena Epova, CPA
International Practice
Leader, Atlanta Officer
Leader, and Tax Partner



Mark Kashgegian,
CPA
Restaurant, Hospitality,
and Franchise Partner



Mark Mirsky, CPA
Manufacturing and
Distribution Tax Partner



Kathy O'Connor, CPA,
CGMA
Nonprofit Consulting
Leader and Partner



Fred Davis, JD, CPA
Nonprofit Tax Partner



Elisa Martinez
Obillo, CPA
Audit Services
Director

Richard Kopelman and Lexy Kessler named to Accounting Today's 2025 Top 100 Most Influential People in Accounting

Recognized as one of the profession's most coveted lists, Accounting Today names leaders who are shaping the future of accounting, from advancing AI and innovative advisory models to strengthening the talent pipeline and reinforcing the industry's enduring commitment to integrity and accountability. Richard Kopelman, CEO, and Lexy Kessler, Audit Partner and Chair of the AICPA, are highlighted for their leadership and vision in advancing the profession and positioning Aprio as the firm of the future.

Lexy Kessler Named Chair of the American Institute of CPAs and the Association of International Certified Professional Accountants

Audit Partner Lexy Kessler, CPA, CGMA, serves as Chair of the American Institute of CPAs (AICPA), and Chair of the Association of International Certified Professional Accountants, which combines the strengths of the AICPA and the Chartered Institute of Management Accountants (CIMA). Lexy stepped into the role following her term as vice chair, bringing decades of leadership, vision, and impact to one of the profession's most influential positions.

Nicole Mitchell Honored at “Celebration of Women in Accounting”

Nicole Mitchell, CPA, CGMA, MBA, who serves as partner and leader of Aprio's Client Accounting Services Practice, was among the inaugural honorees at the first-ever series of receptions and live podcast recordings celebrating Women in Accounting, hosted by Rho and Fintech is Femme. The event brought together leaders from across finance, accounting, and fintech to celebrate the trailblazing women reshaping the profession. Nicole was recognized for her transformative leadership in delivering scalable financial solutions to high-growth companies.

James Lockhart Appointed Vice-Chair of American Bar Association Real Estate Private Equity Committee

Aprio Real Estate Tax Partner James Lockhart, CPA, JD, LL.M. serves as vice chair of the American Bar Association Real Estate Private Equity Committee, where he plays a lead role in shaping industry dialogue and promoting best practices in the field of real estate private equity. With a dual background in accounting and law, James is widely recognized for his experience in tax and business structuring, investment strategy, financing, due diligence, and exit planning.



Aprio Partner Class of 2025

Aprio promoted 13 of our exceptional professionals to partner, underscoring our commitment to developing top talent and empowering the next generation of leaders within the firm. With diverse industry experience and a shared commitment to our people-first approach, these partners joined 200+ other Aprio partners who are driving our strategic growth.



Madeleine Batson,
CPA, CFP®
Wealth Management,
Tax



Gary Bedsole
Transaction Advisory
Services, Tax



Carl Budenski
International, Tax



Emily Cheshire,
FCA
Technology, Client
Accounting Services



Stacy Cullen, JD,
LLM
Nonprofit, Tax



Chelsea Dorfeld,
CPA
Professional Services,
Tax



Jacelyn Ferriell
Government
Contracting, Client
Accounting Services



Sarah Garcia, CPA
Private Client
Services, Tax



Grant Gooding,
CPA
Real Estate | Affordable
Housing, Audit



Chris Henderson,
CPA
Manufacturing &
Distribution, Tax



Kevin O'Brien, CPA
Private Client Services,
Tax



Marcus Oglesby,
CPA
Insurance, Audit



Casey O'Keefe, CPA
Technology, Audit

Aprio[®]

