



2017-2018

# ANNUAL REVIEW



United around RKL's mission of enriching our clients, team and communities, there is no limit to what we can achieve.



# A MESSAGE FROM ED

Welcome to RKL's 2017-2018 Annual Review. We're proud to present this update on the growth and success of our firm and our team over the past year and a half. It's a valuable chance to stop and appreciate the profound privilege we have to serve our clients, give back to our communities and work alongside an inspiring team of problem-solvers, value-drivers and skilled strategists.

Compiling signature achievements – like the growing footprint, new capabilities and national accolades you'll read about in these pages – is a powerful reminder of the impactful work underway at RKL. Go beyond these headlines, however, and you'll find a firm that is redefining professional services because the status quo is never good enough. You'll find professionals who thrive on collaboration and take a cross-disciplinary approach to driving real results. And you'll find an engaged team that is a positive force for good within our communities.

All of these qualities have fueled our evolution into the trusted, strategic business advisory firm we are today and will continue to afford exciting new possibilities moving forward.

Sincerely,

A handwritten signature in black ink, appearing to read 'Ed Monborne', with a stylized flourish extending from the end.

Edward W. Monborne  
CEO, RKL LLP

# NEW PLACES AND NEW FACES

For years, RKL has served the financial, technology and advisory needs of businesses and organizations from coast-to-coast. In 2018, the firm added three new locations that expand our physical presence and deepen our professional bench in key markets.

2018 started strong with two mergers effective on New Year's Day. RKL merged in Mechanicsburg-based CPA firm Padden, Guerrini & Associates (PGA), which grew our Greater Capital Region complement to approximately 50 team members. Capitalizing on synergies in industry focus, the deal boosted RKL into the top 10 firms serving credit unions nationally and added a new dimension of outsourced medical billing services to the firm's nationally respected Senior Living Services Consulting Group.

“

We consider RKL a trusted business partner and depend on their proactive guidance and fresh insights to help us prepare for what's next.

***Julie Copeland, CEO***

Philadelphia-based industrial safety equipment manufacturer and supplier Arbill

”



RKL eSolutions expanded its portfolio of market-leading solutions with the merger of Simi Valley, California-based Arxis Technology, Inc. On the heels of the September 2017 addition of Sage Intacct to its product portfolio, the merger with Arxis allows RKL eSolutions to serve the financial and accounting cloud-computing needs of a wider range of industries, including entertainment, professional services, nonprofits and the public sector.

RKL's growth story continued in June 2018 with the opening of our newest Pennsylvania location in Exton. Many long-time RKL clients call Greater Philadelphia home, so having a physical presence there allows our team to deliver closer, more personalized services to our sizeable client base in the region and forge new relationships within the local business community.

Solidifying the firm's presence in these important Pennsylvania markets and staking new ground on the West Coast presents a number of opportunities for the RKL team and our valued clients. This continued geographic expansion, combined with the talented team and cutting-edge capabilities celebrated throughout this Annual Review, means RKL can play a more direct role in our clients' business strategy and position them for real, sustained growth.



MECHANICSBURG, **PA**  
EXTON, **PA**  
SIMI VALLEY, **CA**

# A FIRM THAT'S GOING PLACES

#  
#  
15

TOP FIRM IN THE  
MID-ATLANTIC  
ACCOUNTING TODAY  
2018

1,656

BUSINESS & NONPROFIT LEADERS  
HOSTED AT RKL EVENTS

#  
#  
67

2018 TOP 100 FIRM  
INSIDE PUBLIC  
ACCOUNTING

#  
#  
64

2018 TOP 100 FIRMS  
ACCOUNTING TODAY



# BEST PLACES to work in PA

RANKED

#10

IN 2017

RANKED

#5

IN 2018



# FOCUSED ON PEOPLE





Fostering a workplace culture of trust, teamwork and accountability that inspires and fulfills our team members is essential to RKL's mission. These ongoing efforts to cultivate innovation earned us back-to-back recognition among the Best Places to Work in PA, a statewide program that uses workplace data and employee survey results to identify the Commonwealth's leading employers.

RKL's collaborative and problem-solving team of more than 450 professionals is the lifeblood of the firm's continued growth and success, according to CEO Ed Monborne.

**"It's a pretty straightforward strategy – find great talent, develop your people and they'll be empowered to innovate and deliver solutions you never thought possible."**

- Ed Monborne, CEO

Whether it is supply chain optimization, data analytics or tax reform guidance, the RKL team is on the front line with its clients, helping them solve emerging challenges and navigate a changing business landscape. This ever-widening menu of business disciplines and wide variety of types and sizes of clients offer the RKL team exposure to diverse career paths. To support its dynamic professionals and prepare the next generation of problem-solvers, RKL offers robust learning and development, mentoring and community leadership programs.

For Barry Pelagatti, Exton Office Managing Partner, involvement with RKL's talent development initiatives keep him and other firm leaders inspired for the future.

"RKL team members take pride in working at an industry leading firm," Barry says. "One of the best parts of my job is channeling the high level of enthusiasm around the new opportunities that our firm's expansion and innovation afford us all."

This entrepreneurial mindset isn't the only reason RKL stands as an employer of choice in Pennsylvania. Called by its mission to "enrich the lives of our team, clients and community," the firm is equally committed to the personal growth of its team members. Social activities and team-building events in and out of the office encourage strong bonds and lasting friendships among the RKL team. Whether it's volunteering alongside colleagues or getting involved in causes they're personally passionate about, RKL also provides team members a number of ways to build meaningful community connections.

## Q&A

*Favorite part of life at RKL?*

**"Good people that want to do the right thing, whether it is for clients or for the community or for each other."**

*Michelle Gibbons, Small Business Principal*

# A GROWING AND **TALENTED TEAM**

## AWARDS & RECOGNITIONS

### **Rob Berkebile**

2018 Outstanding Alumnus  
Leadership York

### **Jill Gilbert**

2018 Women of Influence  
Central Penn Business Journal

### **Gretchen Naso**

2018 Women of Influence  
Lehigh Valley Business

### **Nick Boyer**

2018 Forty Under 40  
Central Penn Business Journal

### **Ryan Hurst**

2018 Forty Under 40  
Reading Eagle

### **David Cieslak**

2018 Top 100 Most Influential  
People in Accounting  
Accounting Today

## LEADERSHIP PROGRAMS

### **Alison Dowdrick**

2018 Leadership Lancaster Graduate

### **Tom Kaizar**

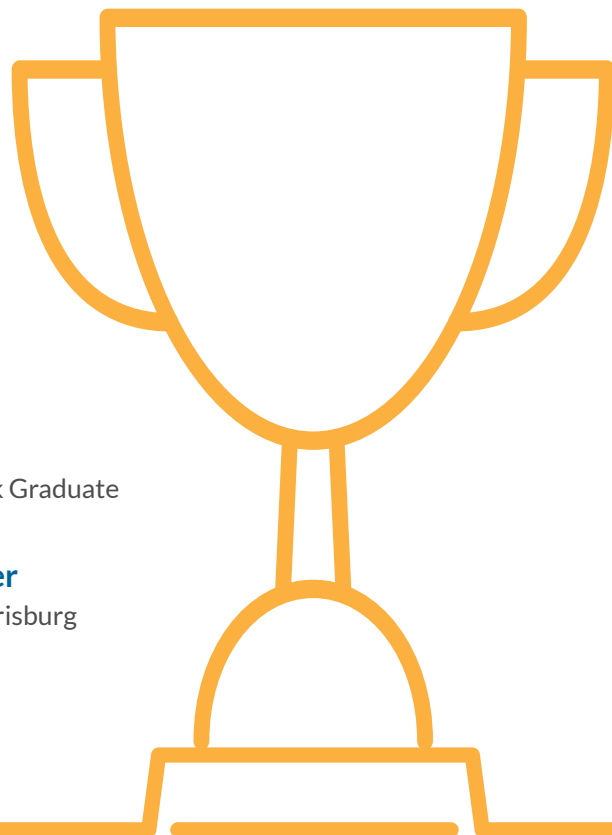
2018 Leadership York Graduate

### **Tamera Grodzinski & Jeff Slaymaker**

2018 Leadership Berks at Alvernia  
University Graduates

### **Allyson Hornbaker**

2018 Leadership Harrisburg  
Executive Graduate



## ADMITTED INTO PARTNERSHIP

**Jonathan Clark**  
**Mike Eby**

**Karin Guerrini**  
**Allyson Hornbaker**

**Ryan Hurst**  
**Stefanie Knaub**

**Len Metkowski**  
**Hunter Mink**

**Dave Padden**  
**Ruthann Woll**

## RETIRED FROM PARTNERSHIP

**Karin Guerrini**

**Dave Padden**

**Andy Weidman**

## PASSED THE CPA EXAM

**Joshua Bauer**  
**Ryan Crucitt**  
**Emerson Eckrote**

**Samantha Helm**  
**Andrew Kurtz**  
**Desiree Mauriello**

**Nolan Myers**  
**Kayla Reichwein**  
**Samantha Reitz**

**Daniel Schellhamer**  
**Cody Zerbe**

## TEAM MEMBER CERTIFICATIONS & MASTERS DEGREES

**Brandon Adams**  
Chartered Financial Analyst

**Pat Anson**  
Sage Intacct Implementation Specialist

**Paula Barrett**  
Certified Exit Planning Advisor

**Emily Bomberger**  
Certified Fraud Examiner  
Accredited in Business Valuation

**Devin Cenekofsky**  
Sage EM Certified Distribution Consultant  
Sage EM Certified Finance Consultant  
Sage EM Certified Manufacturing Consultant

**Michele Cunningham**  
Certified Payroll Professional

**Adam Fegley**  
Adaptive Insights Partner Certification

**Brandi Gravish**  
Certified in Entity and Intangible Valuations

**Karen Hanley**  
Sage Intacct Implementation Specialist

**Jeffrey Helm**  
Sage EM Certified Distribution Consultant  
Sage EM Certified Finance Consultant

**Samantha Helm**  
Master of Business Administration

**Andrew Kehl**  
Master of Business Administration  
in Accounting and Human Resources

**Stephanie Kessler**  
Certified HIPAA Professional

**Victoria Machorro**  
Sage Intacct Implementation Specialist  
Sage Intacct Accounting Specialist

**Tina Meacham**  
Sage 100 Technical Consultant Certification  
Sage 100 Financial Consultant Certification  
Sage 100 Distribution Consultant Certification

**Michael Nardini**  
Selling Through Curiosity Certification

**Timothy Prots**  
Sage EM Distribution Certification

**Jessica Rathe**  
Sage EM Certified Distribution Consultant  
Sage EM Certified Finance Consultant  
Sage EM Certified Manufacturing Consultant

**Andrew Rice**  
Certified Valuation Analyst

**Daniel Schellhamer**  
Master of Accounting

**Madeline Stefanou**  
Sage 100 Technical  
Consultant Certification

**Bridgette Toth**  
Certified Bookkeeper

**Justin Wilcox**  
Sage EM Certified Finance Consultant

# 159

**NEW TEAM  
MEMBERS**

Since July 1, 2017



# NEW SOLUTIONS FOR **NEW CHALLENGES**





A shared commitment to delivering real results. A relentless focus on positioning our clients for sustained growth. Since the firm's founding, these qualities have evolved RKL's suite of services to include new disciplines and specializations not often found at traditional firms. The past year has been no exception, as RKL continues to empower its professionals to innovate and collaborate around new ways to drive real results for clients.

## "PEOPLE ARE PEOPLE IN EVERY INDUSTRY"

In response to increased demand for guidance on finding, compensating, motivating, training and retaining talent, RKL leadership formalized its ongoing efforts to help companies address these and other people issues into the Human Resources Consulting Practice in early 2018, and has since expanded its team of consultants to serve a growing client base.

"The workforce is changing and new concepts are coming to the forefront, but at the end of the day, people are people in every industry," Human Resources Consulting Practice Leader Danielle Hoffer notes. "Our HR Consultants leverage the multi-disciplined perspective of the broader RKL team to deliver solutions that not only solve people issues, but also support an organization's overall business strategy."

## TRANSFORMING FINANCIAL REPORTING FOR EVEN MORE INDUSTRIES

As a nationally recognized Sage reseller, RKL eSolutions has long served the technology consulting and ERP software needs of companies in the manufacturing, distribution and food and beverage industries. To maximize the synergies between the CPA/advisory and IT consulting branches of the firm, RKL eSolutions added Sage Intacct to its portfolio in late 2017. This proven, cloud-based solution allows the team to synthesize a range of business data points into convenient and customizable reporting for service-based, entertainment, nonprofit and public sector organizations.

### Q&A

*What is your greatest recent achievement?*

"Being able to proactively help our clients navigate through tax reform with presentations, thought leadership and one-on-one interactions."

*Ruthann Woll, Tax Partner*


# UNLIMITED POSSIBILITIES FOR COLLABORATION AND SUCCESS

RKL Wealth Management's focus on helping individuals, families and business owners realize their unique financial goals has generated tremendous growth for its clients, with the firm surpassing \$1 billion in assets under management/advisement at the end of 2017.

To sustain this success, RKL Wealth Management underwent a comprehensive strategic planning process during the summer of 2018. The identified goals and priorities for the next few years revolve around the collaborative spirit that has fueled RKL's overall success in recent decades. Aligned around a vision to grow a powerful regional wealth management practice, the RKL Wealth Management team will more strategically integrate with and leverage the tax and advisory services of the CPA/consulting firm to offer its clients an enhanced and more customized experience along the entire financial planning and investment advisory spectrum.

## READY FOR WHAT'S NEXT IN BUSINESS

From getting dependable, real-time financial metrics to finding and retaining strategic talent, the challenges facing today's organizations have many seeking a better way to manage their back office functions. Under the leadership of Business Consulting Service Leader Bethany Novis, RKL's Client Advisory Services Practice leverages best-in-class technology, strategically focused RKL talent and a forward-thinking approach to building and improving the key infrastructure needed to support organizations as they grow. From interim support to fully outsourced virtual accounting solutions, RKL helps companies prepare for what's next in their business by giving them the insights, technology and talent they seek.



"RKL values my entrepreneurial tendencies and gives me the support to expand our capabilities to play an even greater role in our clients' success."

*Bethany Novis, Partner*





# A POSITIVE FORCE FOR GOOD

34 **BIRTHDAY BAGS**  
assembled for the  
United Way of the  
Capital Region

Making sure we take care of the  
area we live in is very important  
to me, and I'm proud to be part of  
an organization that has beliefs  
and values that align with mine.

*Marco Angelone, Audit Manager*

190

**PEOPLE  
SERVED**

at New  
Journey  
Community  
Outreach  
Soup Kitchen

405 **ORGANIZATIONS**  
financially supported

**TEAM  
MEMBERS**

serving 230

**ORGANIZATIONS**  
on boards/committees





\$445,492

**2017-2018 UNITED WAY**  
Firm Wide Contributions

55,000

**ITEMS COLLECTED**

in firm wide School Supply Drive

**PAIRS OF HIGH HEELS**

donned by RKLers for Walk a  
Mile in Her Shoes events

60

13,225

**HOURS  
VOLUNTEERED**

# RKL LEADERSHIP

## PARTNERS

January 1, 2019

**Amy Gohn Anstine**

**Paula K. Barrett**

**Wade G. Becker** | *Capital  
Region Office Managing Partner*

**W. Robert Berkebile\***

**Douglas L. Berman** | *York Office  
Managing Partner*

**Jeffrey E. Boland\***

**Alan B. Carman**

**James G. Cassel III**

**Jonathan M. Clark**

**John H.S. Craley**

**Michael R. DePaul, Jr.**

**Francis J. Donnelly**

**Michael J. Eby**

**Kevin A. Eisenhart**

**Keith L. Eldredge**

**David G. Engle**

**Charles M. Fabian**

**Steven E. Fisher\*** | *Audit  
Service Line Leader, Reading Office  
Managing Partner*

**Robert D. Gantz**

**Jill E. Gilbert**

**Robert M. Gratalo** | *Tax Service  
Line Leader*

**Allyson R. Hornbaker**

**Jeffrey N. Horst**

**Ryan P. Hurst**

**Stephanie S. Kessler**

**Scott J. Kimmel**

**Stefanie M. Knaub**

**Wendy M. Lakatosh**

**Wendy L. Lance\***

**Leonard P. Metkowski**

**D. Hunter Mink**

**Edward W. Monborne, CEO\***

**Duane E. Moyer**

**G. Scott Myers**

**Joe L. Noll** | *President  
RKL eSolutions*

**Bethany A. Novis** | *Business  
Consulting Service Line Leader*

**James H. Ostrowski** | *Small  
Business Service Line Leader*

**Laurie M. Peer** | *President  
RKL Wealth Management*

**Barry M. Pelagatti** | *Exton  
Office Managing Partner*

**James W. Pruzinsky**

**George R. Reinoehl, Jr.**

**Clint M. Rider**

**Douglas L. Smith**

**John S. Stoner\***

**Steven C. Weidner**

**Eric R. Wenger\*** | *Lancaster  
Office Managing Partner*

**Ruthann J. Woll**

**Mark S. Zettlemoyer**

*\*RKL Board of Directors*

## PRINCIPALS & PRACTICE LEADERS

**Randy C. Coneby** | Principal, Risk Management

**Marianne E. Drumm** | Principal, Risk Management

**Michelle S. Gibbons** | Principal, Small Business

**Danielle J. Hoffer** | Human Resources Consulting  
Practice Leader

**Gretchen G. Naso** | Fair Value Services  
Practice Leader

**Ethel A.M. Nawrocki** | Principal, Tax

**Rosemary D. Ondeck** | Principal, Risk Management

**Robert E. Pozesky** | Operations Consulting  
Practice Leader

**Jason C. Skrinak** | State & Local Tax Practice Leader

## RKL WEALTH MANAGEMENT

**Laurie M. Peer** | Partner/President

**Nicholas A. Boyer** | Chief Investment Officer/Executive Vice President

**Sarah Young Fisher** | President Emeritus

## RKL eSOLUTIONS

**Joe Noll** | Partner/President

**Bob Gaby** | Chief Operating Officer

**David Cieslak** | Chief Cloud Officer

**Tim Efinger** | Controller

**Walt Goodfield** | Executive Vice President, Sales  
& Marketing

**Bob Miller** | Vice President,  
Network Infrastructure Services

**Cliff Horst** | Vice President, Technical Services & Support

**Tom Tobias** | Vice President, Sage Enterprise  
Management Practice

**Russ Griffith** | Vice President, Sage 500 Practice

**Shannon Sadowsky** | Director, Sage 100 Practice

**Jason Blankenship** | Director, BI and Custom Development

**Pat Anson** | Director, Sage Intacct Practice

## ADMINISTRATION

**Scott J. Kimmel** | Partner/Chief Business  
Development Officer

**Kathy Gutierrez** | Director of Human Resources

**Kevin W. Lightner** | Chief Financial Officer

**Pamela M. Mahoney** | Director of  
Information Technology

**Allison Schlegelmilch** | Director of Marketing





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