



**rkl** 2020  
Annual Review



## A Message from the CEO

This year tested us all in ways we never expected. It was also a reminder of what really matters – the power of trusted relationships, the kindness of our neighbors and the ingenuity that lights the way toward better days.

In this spirit, we present RKL's 2020 Annual Review. This chapter of our firm's story celebrates RKL team members who embraced fast-paced uncertainty as a growth opportunity and devised new ways to support our clients and connect with each other. We also salute a few of the many RKL clients who responded to the pandemic and reinvented themselves in the face of dire community need. The generous spirit of the RKL team remained strong this year, with so many of our colleagues stepping up to lend a hand in a safe and healthy manner.

2020 certainly looked and felt different for all of us, but I am proud that RKL helped lead the way through disruption with honesty and empathy. As we look back on this year, I am heartened by the fact that RKL is a strong and united team that brings out the best in each other and remains committed to enriching the lives of our clients, our team and our communities.

Sincerely,



**Ed Monborne**  
RKL CEO

## Trusted Advisors for Unparalleled Disruption

For our valued clients and friends of the firm, RKL is the first call for pressing business questions. When the pandemic upended the status quo in a matter of days, the RKL team wasted no time developing new ways to help organizations rethink how they manage their operations, finances and workforce.

Within 72 hours of RKL's office closures in mid-March, the team went on air with its first coronavirus webinar. In the weeks that followed, RKL provided solutions centered on response and survival. As Pennsylvania's economy started to reopen, the webinar's focus shifted to adaptation and recovery. RKL's relevant insights and relatable candor attracted the loyalty and trust of thousands of owners, executives and professionals throughout 2020, and the firm continues to help them navigate uncertainty and grow stronger.

Being that first call is a significant responsibility – one that RKL advisors take seriously. The firm's financial and business acumen helped regional organizations survive and sustain, and its human and honest approach cut through the noise and made leaders and executives feel less alone amidst a once-in-a-generation crisis.



Bethany Novis, *Leader and Partner, Consulting Services Group*

We made the choice to be open and honest with our audience and let them know when things are still unknown or unclear and what information may have evolved. We wanted the business community to know that we are in it with them and that we're all digging in together to learn and figure it all out.





## Client & Community Feedback

It helps to have trusted partners during times of crisis.

We so appreciate RKL's initiative, in laying out what you know without the misinformation that so many companies are throwing out there.

Your team focused on relevant facts and solutions. It was refreshing to have a presentation that took the approach of 'here is where we are, let's move forward' rather than 'OMG, we have never been through this before.'

RKL has been a huge help during COVID and the team has been staying on top of everything like real professionals.

I commend the team on RKL's coronavirus webinars. They have been top-notch information.

The webinar series...provided a sense of normalcy, knowing that we would hear something of value each week and it was always on point.

The webinars have been excellent - by far the best and most informative out there.

RKL's COVID-19 info has been really helpful.

## RKL COVID-19 Support & Guidance: By the Numbers

# 38

WEBINAR SESSIONS

# 14,109

TOTAL ATTENDEES

# 81

UPDATES PUBLISHED  
TO RESOURCE CENTER

# 6,656

ON-DEMAND VIDEO VIEWS

# 42

EMAIL UPDATES



## Rising to the Challenge

The RKL team drew inspiration from local organizations that joined the fight to keep our communities safe, secure and healthy.

**Below are just a few examples of RKL clients who met the moment with service and dedication:**



**INCORD, SMITH & VANDIVER, ROUSH YATES ENGINES,  
PEACOCK ALLEY AND UNIVERSAL PROTECTIVE PACKAGING, INC.**

All retooled or expanded their manufacturing operations to produce much-needed personal protective equipment (face shields, gowns and masks) and hand sanitizer.



**YORK COUNTY FOOD BANK**

Added a second distribution site and grew its volunteer network in response to soaring levels of food insecurity and hunger in the community.



**LANCASTER EMERGENCY ASSOCIATES, INC.**

Kept the emergency room at Lancaster General Hospital staffed and ready to meet community health needs.



**REDNER'S MARKETS**

Increased frontline worker pay and awarded bonuses in recognition of extended hours and efforts to keep shelves stocked amid skyrocketing demand.

## Meeting the Moment with Innovation and Adaptability

Crises do not fall neatly into a silo or recognize divisions between functions and departments. Thankfully, cross-disciplinary collaboration has long been a hallmark of the RKL approach, so the team was able to quickly harness the full force of the firm's capabilities and expertise and assemble a suite of solutions to meet a wide range of client needs triggered by the pandemic.

The scope and severity of COVID-19 and the federal government's response to it demanded an even higher level of activation and engagement by the RKL team. All hands on deck is an apt way to describe the year and RKL professionals rose to the challenge without skipping a beat. Team members from the firm's different entities and service lines worked together to learn about Paycheck Protection Program (PPP), the CARES Act and other brand new, complex relief programs.

Laser-focused on helping our clients survive the crisis, the RKL team discovered that working outside their comfort zones could be rewarding and serve as fuel for personal and professional growth. There is no limit to where this collaborative innovation can take the firm and the real results it can generate for clients.

Robin Alexander, *Tax Manager*



Time and perfection are luxuries none of us have during a crisis, so we had to jump in and make sense of evolving regulations and interpret grey areas to the best of our ability. Letting go may not have always been comfortable, but it helped me grow more confident as an advisor and deepened the trust and honesty between me and my clients.



Robin took part in several RKL thought leadership initiatives, authoring a blog on PPP knowns and unknowns and presenting breaking webinar updates on new federal tax provisions and credits.



Tricia Richardson, *Human Capital Management Senior Consultant*

The pandemic created major challenges for an organization's people and processes, so we had to develop equally broad and bold ways to help our clients address them. We focused on developing tools and guidance that would resolve payroll and workforce pain points and make employers' lives easier so they could focus on the safety and well-being of their teams and customers.



Tricia created new multi-media support packages to help employers capture new tax credits and identified tens of thousands of dollars in eligible tax credits almost left on the table.



Nicholas Boyer, *RKL Partner and RKL Wealth Management Chief Investment Officer*

The best antidote to fear is information, so we delivered data-backed insights into the underlying fundamentals of the U.S. and global economy. We took our clients beyond the news cycle to contextualize significant disruptions within long-term market performance.



Nick presented vital economic updates and perspective in webinars and videos throughout 2020, helping assuage concerns over market disruption and keep clients on track toward long-term financial plans and goals.



Jennifer Mitchell, *Risk Management Senior Associate*

I'm a numbers person who likes to analyze facts and figures, check (and recheck) my work and support my findings with evidence. Living in the grey area does not always come naturally to me, but this year I decided to take a chance and try new things to support the firm's coronavirus response. I definitely feel like I have grown as a professional as a result.



Jennifer volunteered to take part in RKL's PPP response team, which fielded more than 2,000 client questions, helped with 300 loan applications and forecasted forgiveness for 113 clients.

## New Practice Leaders

**AMY HEIM**

Estates and Trust

**DEBORAH ROCK**

Cost Segregation

**STEPHANE SMITH**

Human Capital Management

## New Partners

**CARRIE BOOTH**

**JOHNATHON HELLER**

**DANIEL NICKISCHER**

**STEPHEN RUNYEON**

## Retired Partners

**DAVID ENGLE**

**JAMES PRUZINSKY**

**DOUGLAS SMITH**

## Team Member Awards

**TRAVIS BIEBER**

Lehigh Valley Business Forty Under 40

**MICHAEL EBY**

Central Penn Business Journal Forty Under 40

**JULIYA KOFMAN GREENFIELD**

Chester County VISTA Millennial Superstars

**STEPHANIE KESSLER**

Central Penn Business Journal Women of Influence

**KAYLA REICHWEIN**

PICPA Young Leaders

**DANIEL SCHELLHAMER**

PICPA Young Leaders

## Passed the CPA Exam/Obtained CPA License

**ABIGAIL FITZ**

**ADAM FYE**

**CLARE HERBERT**

**MICHELLE KAUTERMAN**

**MICHAEL MARTINSKY**

**JENNIFER MITCHELL**

**ALEXANDER MORAN**

**DIANA RICCI**

**MEAGAN SCALA**

**JEREMY SCHULTZ**

**ADAM WEAVER**

**KEVIN WILCOX**

**ZACHARY WILSON**

# Team Member Certifications & Masters Degrees

## **ROBIN ALEXANDER**

Masters in Taxation

## **BRAYDEN CAMPBELL**

Certified Financial Planner

## **DEVIN CENEKOFSKY**

Sage Software Application Consultant

## **DAVID CIESLAK**

Adaptive Insights Pre-Sales Certification

## **ZACHARY CONNER**

Adaptive Insights Product Implementation Certification

## **LISA ENDERS**

Masters in Taxation

## **ANGELA EUBANKS**

Sage Intacct Implementation Specialist

## **RACHEL EWELL**

Smartsheet Product Certification

## **RYAN FREY**

Certified Information Systems Auditor

## **VENESSA GRIFFIN**

Knowledgesync v10 Certification

## **JEFFREY HELM**

Avalara Certified Implementation Partner: CertCapture, AvaTax and Returns

## **YENMA HERB**

Smartsheet Product Certification

## **GIA LANE**

Selling Through Curiosity Certification

## **MICHELLE LAUDANO**

Selling Through Curiosity Certification

## **CAROLYN LUCAS**

Sage Intacct Implementation Specialist

## **KATE MULLEN**

Knowledgesync v10 Certification

## **KAY NEWELL**

Sage X3 Financial Consultant Certification

Adaptive Insights Product Deployment Certification

## **DANIEL NICKISCHER**

Certified Construction Industry Financial Professional

## **LINDSEY PALLADINO**

Selling Through Curiosity Certification

## **JAMES PALYS**

Qualified 401(k) Administrator

## **TODD PARSONS**

Sage Intacct Implementation Specialist

## **CHRISTIAN PASCUZZO**

Certified Financial Planner

## **TIMOTHY PROTS**

Sage X3 Web Scheduling

## **MATTHEW ROHRER**

Salesforce Certified Administrator

Avalara Certified Implementations Partner:  
CertCapture, AvaTax and Returns

## **CLARE ROWLEY**

Certified Fraud Examiner

## **LEEANN SEGAN**

Sage Intacct Implementation Specialist

Sage X3 Financial and Distribution Consultant  
Certification

## **MICHAEL SHARE**

Selling Through Curiosity Certification

## **LAUREN STRICKER**

Smartsheet Product Certification

## **ZACHARY STRICKER**

Certified Valuation Analyst

## **TINA TRIMBLE**

Sage 100 Financial and Distribution Consultant  
Certification

## **JE'NETTE WEABER**

Notary Public Commission

## **JEREMY WITMER**

Masters of Science in Business Intelligence & Analytics





## Listening, Learning and Connecting

Continuous self-reflection and improvement are central to RKL's standing as a national professional services leader and an employer of choice. This year, RKL committed itself to having the hard conversations, identifying new opportunities for growth and building deeper connections throughout its footprint and beyond. The strategic initiatives described here are not destinations; rather, they are all part of a journey the firm is taking together with its team, clients and communities to build a brighter and more inclusive future.

# Diversity, Equity and Inclusion

Fostering an environment that reflects diverse perspectives is imperative for today's organizations. The business benefits of diversity, equity and inclusion are clear, but there was only one reason needed for RKL to act with intentionality around critical issues of racial and social justice: it is the right thing to do.

RKL established its Diversity, Equity and Inclusion initiative to begin the conversation among team members and make the firm part of the solution. RKL CEO Ed Monborne also signed the nationwide CEO Pledge, which outlines specific actions for open dialogue, expanded training and strategic objectives.

As RKL HR Director Kathy Gutierrez noted, "We're not interested in quick fixes; we want to create deep, sustainable impact." The firm is committed to a cycle of continuous improvement to ward off complacency, keeping the team engaged and driving cultural change where everyone can bring their whole self to work. There is much work ahead, but the RKL team is ready to move forward with empathy, honesty and mutual respect.

Kathy Gutierrez, *Human Resources Director*



Our goal is to focus on the right things at the right time. We're not interested in quick fixes; we want to implement strategies that create deep, sustainable impact.



# RKL Innovation Committee

2020 forced everyone to embrace technology – from everyday tasks all the way to the enterprise level. RKL’s leaders seized this momentum to expand the purview and efforts of the firm’s existing technology initiative into a new Innovation Committee. Representing every firm service line, business unit and practice area, the RKL Innovation Committee’s mission is to identify ways to align innovative solutions that benefit the firm and its clients and address strategic business challenges and opportunities.

Joe Noll, RKL eSolutions President and Innovation Committee facilitator, kicked off the first meeting with this Henry Ford quote: “If I had asked people what they wanted, they would’ve said faster horses.” Far too often, experts are so entrenched in what does exist, that they fail to consider what could exist. To create space for innovative ideas, the committee taps into a broad range of perspectives, pushes back against assumptions, challenges standard practice and continually seeks feedback from the entire firm.



Joe Noll, *RKL eSolutions President*

Far too often, experts are so entrenched in what does exist, that they fail to consider what could exist. The RKL Innovation Committee taps into a broad spectrum of perspectives to design our firm’s future.



# RKL Alliance

For years, RKL has teamed up with smaller firms throughout the region to deliver specialized services to their clients. These partnerships were beneficial for everyone involved, which led RKL leaders to think of ways to expand these efforts and the RKL Alliance was born. After the success of a pilot program with a handful of local firms, RKL officially launched its alliance in December 2020.



Scott Kimmel, *Partner and Chief Business Development Officer*

The real value of the RKL Alliance is the chance to develop new relationships and collaborate around additional ways to meet the demands of an increasingly complex business environment.



Through this alliance, RKL will collaborate with member firms to develop new business, share knowledge and industry expertise, enhance the client experience and unlock access to RKL’s specialized suite of services for even more regional organizations.



**LIVE UNITED®**

## Making a Difference

Community service is part of what unites RKL team members and defines the firm's culture.

This year, in the face of increased need and physical distance, giving back also helped make team members feel more engaged and less alone. It may have looked and felt a little different, but the RKL team found ways throughout 2020 to lend a hand to neighbors in need.

169



Organizations financially supported

100+



Art supplies collected for local kids

462



Thanksgiving side dishes donated

21



Gently used laptops provided for community learning needs

## Investing in Servant Leadership

**STEPHANIE CASON**

Leadership Lancaster Graduate

**ZACHARY GALLOWAY**

**& JASON GERBER**

Leadership York Graduates

**ADAM WASZKIEWICZ**

Leadership Berks Graduate

**BEST PLACES**  
to work in **PA** **2020**

# Community Engagement in Focus: **RKL + United Way**

One of the cornerstones of RKL's community engagement is participating in the annual campaigns for local United Way chapters throughout the firm's footprint. RKL played an even more direct role in 2020, when **Audit Partner Hunter Mink** served as Chair for the United Way of York County's 99<sup>th</sup> Annual Campaign. Read on to learn more about Hunter's leadership role, how he navigated the pandemic's fundraising and organizational challenges and why he feels United Way support is integral to RKL's mission.

Question



What does the Campaign Chair role entail?



Hunter Mink



I've been a Campaign Cabinet member for the past five years and served as Vice Chair for the 2019 campaign, so it was a natural transition into the leadership role. As Chair, I led the Campaign Cabinet, made up of around 20 local professionals, which focused on connecting with companies and encouraging financial support. We are essentially ambassadors for the United Way, advocating for the important services the organization provides, especially during the unprecedented challenges our neighbors faced this year.



Question



What did it mean to you to serve in this role?



Hunter Mink



It was an honor and a humbling experience. This is York County's largest annual giving campaign and so significant in terms of the real impact it makes in the lives of local families. It was also incredibly challenging because we essentially had to throw out the playbook when the pandemic hit and reinvent the way we fundraised and interacted.



Question



Why is support of local United Way chapters important to RKL's philanthropic efforts?



Hunter Mink



What I love about RKL is that the firm really empowers the team to get engaged and give back in a variety of ways. A team member may contribute to the United Way campaign, lend a hand at the Day of Action and then create a new donation drive to support a cause that's important to them. All of this work is important and it all makes an impact. The firm's long-standing history of strong United Way support across our footprint should be a source of pride for all RKL team members.



# \$209,438

2020 United Way Firm Wide Contributions



# Firm Leadership

## Partners

(as of January 1, 2021)

**AMY GOHN ANSTINE**

**PAULA BARRETT**

**WADE BECKER**

Capital Region Office Managing  
Partner

**W. ROBERT BERKEBILE\***

**DOUGLAS BERMAN**

York Office Managing Partner

**JEFFREY BOLAND**

**CARRIE BOOTH**

**NICHOLAS BOYER**

**ALAN CARMAN**

**JAMES CASSEL III**

**JONATHAN CLARK**

**MICHAEL DEPAUL, JR.**

**FRANCIS DONNELLY**

**MICHAEL EBY**

**KEITH ELDREDGE**

**CHARLES FABIAN**

**STEVEN FISHER**

Audit Service Line Leader  
Reading Office Managing Partner

**ROBERT GANTZ\***

**JILL GILBERT**

**ROBERT GRATALO**

**JOHNATHON HELLER**

**ALLYSON HORNBAKER**

**JEFFREY HORST**

**RYAN HURST**

**STEPHANIE KESSLER**

**SCOTT KIMMEL**

Chief Business  
Development Officer

**STEFANIE KNAUB**

**WENDY LAKATOSH**

**WENDY LANCE\***

Tax Service Line Leader

**LEONARD METKOWSKI**

**D. HUNTER MINK**

**EDWARD MONBORNE\***  
CEO

**DUANE MOYER**

**G. SCOTT MYERS**

**DANIEL NICKISCHER**

**JOE NOLL**

President, RKL eSolutions

**BETHANY NOVIS**

Consulting Service Line Leader

**JAMES OSTROWSKI**

Small Business Service Line Leader

**LAURIE PEER\***

President, RKL Wealth  
Management

**BARRY PELAGATTI**

Exton Office Managing Partner

**GEORGE REINOEHL, JR.**

**CLINT RIDER**

**STEPHEN RUNYEON**

**JOHN STONER\***

**STEVEN WEIDNER**

**ERIC WENGER\***

Lancaster Office Managing  
Partner

**RUTHANN WOLL**

**MARK ZETTLEMOYER**

\*RKL Board of Directors

## Principals & Practice Leaders

**BENJAMIN FORTNER**

R&D Credit Practice Leader

**MICHELLE GIBBONS**

Principal, Small Business

**JULIYA KOFMAN GREENFIELD**

Principal, Risk Management

**AMY HEIM**

Estates and Trust Practice Leader

**MICHAEL McALLISTER**

IS Assurance and Advisory Services Practice Leader

**GRETCHEN NASO**

Financial Management Solutions and  
Fair Value Services Practice Leader

**ROSEMARY ONDECK**

Principal, Risk Management

**ROBERT POZESKY**

Operations Consulting Practice Leader

**DEBORAH ROCK**

Cost Segregation Practice Leader

**STEPHANE SMITH**

Human Capital Management Practice Leader

## RKL Wealth Management

**LAURIE PEER**

Partner/President

**NICHOLAS BOYER**

Partner/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**

Chief Business Officer

**BOB MILLER**

Vice President, Network Infrastructure Services

**CLIFF HORST**

Vice President, Technical Services and Support

**TOM TOBIAS**

Vice President, Sage X3 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

## Firm Administration

**DANIELLE BAILEY**

Director of Business and Asset Management

**MICHAEL DE STEFANO**

Chief Financial Officer

**KATHY GUTIERREZ**

Director of Human Resources

**DEANNA HIGGINS**

Director of Administrative Services

**PAMELA MAHONEY**

Director of Information Technology

**ALLISON SCHLEGELMILCH**

Director of Marketing

