



rkl

2021
Annual
REVIEW



Welcome to RKL's 2021 Annual Review >

Last year, RKL focused on helping our clients, team and communities respond, recover and adapt. We started 2021 with a new mission: moving forward together, fueled by the toughness and tenacity that carried us through the darkest days of the pandemic.

Challenges remained this year, to be sure. We contended with lingering economic, social and financial effects from the long tail of COVID, and the way we worked and interacted still looked a bit different. However, as we kicked off 2021, there were undeniable glimmers of hope, a desire to reassert control over our destinies and a longing for connection.

A new strategic planning process in early 2021 harnessed this hope and energy and inspired us to think bigger, ask bolder questions and envision RKL's future amidst an economy and industry that were rapidly changing well before COVID-19. The result is a roadmap for the next 18 to 36 months that will evolve our firm, challenge the status quo and create opportunities for our clients, team and community.

Engagement at all levels of the firm is vital to the strategic plan's success. Already, we have seen team members get involved and embrace opportunities to write RKL's next chapter. Engagement also played a key role in team unity throughout 2021, as our professionals seized every chance to come together in person, both for social events and to lend a hand to local neighbors.

You'll read stories of such engagement and collaboration throughout this publication. I hope it leaves you as inspired as I am by the RKL team that never wavers in its commitment to each other, our valued clients and our communities.

Sincerely,



ED MONBORNE
CEO, RKL LLP

The best way
to predict the
future is to
create

PETER DRUCKER

way
the
co
it.
KER



TRY SOMETHING NEW. Consider it this way. Give it a shot.

Spend time with an RKL team member and you'll hear phrases like these. In many ways, the future is now for businesses and organizations; other times, it's still unclear what's around the bend. Addressing this duality is possible thanks to the RKL team's diverse expertise and our wide range of capabilities.

This year, we seized several opportunities to bring more of RKL's specialized services to bear right from the start for our clients. The success of this approach confirms a hunger among organizations and their leaders for comprehensive service and a proactive, collaborative team of advisors. It also unlocks vast possibilities for our talented team to work together and drive value across an entire organization.



AGILE AND RESPONSIVE SERVICE

Having so many solutions and tools available allows us to assemble a cross-functional team quickly to address an organization's urgent needs. Such responsiveness is at the heart of RKL's expanded relationship with a Delaware-based skilled nursing facility, which originally engaged RKL for a strategic opportunities assessment. Upon learning that the facility unexpectedly lost its vendor for financial and management services, RKL Partner Jeff Boland pulled together a bundled proposal to address new areas of need, including outsourced accounting, virtual controller, clinical consulting, medical billing and technology conversion support. This successfully expanded relationship marks the first time RKL's Financial Management Solutions practice served a senior living industry client, representing a new niche opportunity for that group.



TAILORING SOLUTIONS FOR WHAT'S NEXT

RKL continued to serve its focus industries in new ways throughout 2021, including a data analytics pilot with a Pennsylvania-based credit union. RKL analysts parsed the participating credit union's lending and deposit information and segmented members into different rankings. Rather than analyze data to reach static conclusions, however, RKL paired the member ranking with strategic observations and action items intended to increase profitability and engagement among each member segment. RKL's operations and strategy consultants are on deck to help the credit union plan, execute and assess the resulting initiatives.



Partnering with RKL on the financial management and human capital front has been key to our successful growth. We are able to focus on running the business and make faster and more accurate decisions.

ANDY AYERS

Restore Hyper Wellness franchise owner



SUCCESS STORY: RKL + RESTORE HYPER WELLNESS

As the fastest-growing franchise in the U.S., Restore Hyper Wellness needed reliable infrastructure and real-time insights to keep pace with customer demand for its proactive wellness services. While delayed financials from an outsourced accounting provider originally brought Restore to RKL, our advisors recognized the opportunity to serve nearly all of the company's financial, management and growth-related needs. The result is a multi-faceted partnership between Restore's corporate leadership, its franchise locations and RKL, which includes ongoing HR support, outsourced financial management, virtual CFO services, tax consulting and assistance with budgeting, forecasting, cash flow management and securing bank financing.

Our Clients Say >

With RKL, I found a partner who goes beyond compliance to help me run my business better. I consider their deep bench of specialized advisors to be an extension of our team.

KURT TWIFORD
President/CEO, Conexus

My partnership with RKL gives me peace of mind and confidence – I know they have my back as I continue to explore expansion and growth opportunities.

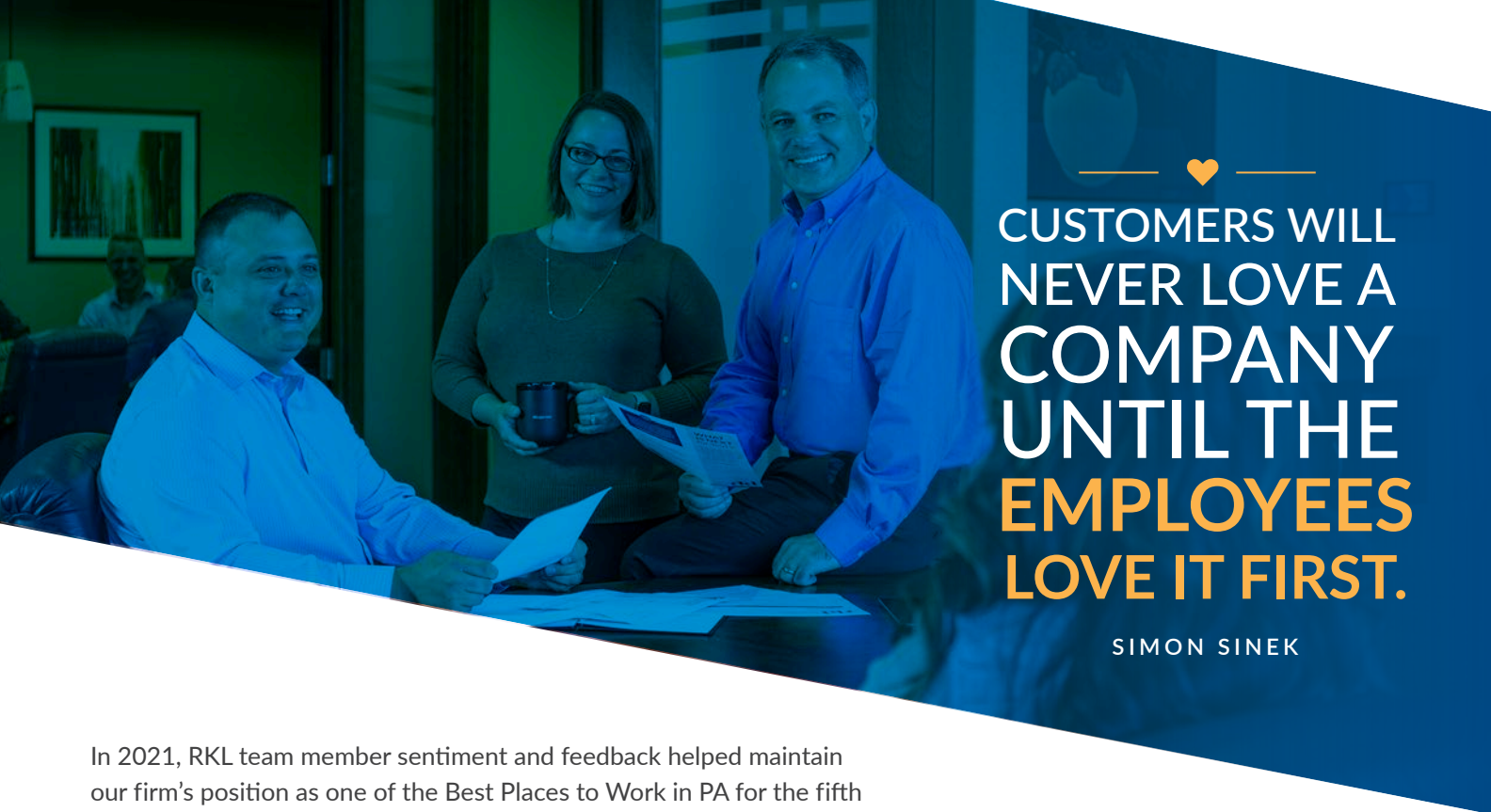
STEVE DYER
Clean Eatz Franchise Owner
Lancaster, PA

“The best part of having RKL as a business partner is their unrelenting support and trustworthy guidance. I know that RKL is always watching out for us and providing the advice we need to make good, solid decisions that foster a long and prosperous business.”

CORRINE HANSEN
Senior VP of Finance & Administration
Yuasa Battery, Inc.

RKL is an invaluable partner. The team's knowledge is an essential resource for us by offering valuable recommendations to continually enhance our information technology and information security programs.

LORI GALL, Chief Risk Officer, Vizo Financial



CUSTOMERS WILL
NEVER LOVE A
COMPANY
UNTIL THE
EMPLOYEES
LOVE IT FIRST.

SIMON SINEK

In 2021, RKL team member sentiment and feedback helped maintain our firm’s position as one of the Best Places to Work in PA for the fifth consecutive year. We’re proud of this streak of positive recognition, which represents a genuine appreciation for our colleagues as professionals and people and a commitment to their ongoing development and success.

We wove this gratitude and focus into our Strategic Plan, setting a goal to become the professional services employer of choice in Pennsylvania and beyond and exploring creative ways to recruit and retain talent amidst a competitive market and generational labor shift.

Team feedback also played a key role in our efforts to create an inclusive, equitable, culturally competent and supportive environment. In 2021, our Diversity, Equity and Inclusion (DEI) committee partnered with the YWCA on a firm wide equity assessment, focus groups and one-on-one interviews to gather team member experiences and perspectives. This input serves as the foundation for the necessary professional and organizational DEI support currently in development.

Best Places
to Work in
PA for **five**
consecutive
years.



RKLeers made the most of time together this year, visiting community fairs, mini golf courses and bowling lanes and celebrating the holidays with creativity and enthusiasm. Events like these strengthen our firm and help create meaningful bonds between team members.



What makes RKL a **Best** Place To Work? >

Transparency is a buzzword many companies throw around, but RKL provides fantastic information about the company's well-being and future plans.

LEANN FIELD
R&D Credit Manager

There is so much capability, commitment and excellence in our team. The way we communicate is full of respect for each other.

JOHN PUTTMAN
RKL eSolutions Architect

The collaborative culture and the willingness of every team member to lend a hand or answer a question.

CHRISTIAN PASCUZZO
RKL Wealth Management Advisor

The work is fast-paced and challenging. I like that every day is different.

TOM KAIZAR
Tax Manager

Our culture of commitment to excellence, teamwork and collaboration make us unique.

PAULA BARRETT
Consulting Partner

We offer our clients a variety of services, which means there is ample opportunity for me to learn about a specific industry or service.

SAMANTHA HELM
Tax Senior Associate

It is a very positive environment; I am encouraged all the time by my fellow team members.

VICTORIA DORSEY
Small Business
Senior Associate

I enjoy meeting new people and clients in different work environments.

RYAN NESTER
Audit Senior Associate

Team Member Certifications & Masters Degrees >

JULIYA KOFMAN GREENFIELD

Certified Cannabis Banking Professional

DENISE HARTMAN

Sage X3 Certified Developer
Sage X3 Certified Integration Developer

JEFFREY HELM

Sage X3 Certified Financial Consultant

CLIFFORD HORST

Sage X3 Certified Technical Consultant

THOMAS KAIZAR

Masters in Taxation

KEVIN LEE

Masters in Taxation

LAURIE PEER

Certified Exit Planning Advisor
Certified Professional Co-Active Coach

MATTHEW ROHRER

Smartsheet Product Certified User

STEVEN ROTH

Certified Prophix Implementer

ALLISON SCHLEGELMILCH

Certified Digital Marketing Professional
Professional Certified Marketer

LEEANN SEGAN

Sage X3 Certified Financial Consultant

BRANDON SIEGFRIED

VMware Horizon 8: Deploy and Manage

SCOTT WATTS

Sage Enterprise Intelligence Consultant
Sage Enterprise Intelligence Architect

PASSED CPA EXAM/ OBTAINED CPA LICENSE

Jared Bixler	Oksana Kolesnik
Colby Blankenbiller	Kaitlyn Lunsford
Caleb Christner	Michael Martinsky
Kirsten Deeds	Jacob Michelman
Angel Fike	Jennifer Mitchell
Abigail Greenly	Tyler Morris
Clare Herbert	Adam Salazer
Jordan Hess	Jeremy Schultz
Andrew Hipple	Christian Smith
Joclyn Hunsicker	Zachary Wilson
Alyssa Kline	





New **PRACTICE LEADERS**

Michael Bannasch | State and Local Tax
Kirsten Deeds | International Tax
William Onorato | Family Office

New **PARTNERS 2021**

Travis Bieber	Ryan Moore
Benjamin Fortner	Michael Stoudt
Timothy Kraft	Joshua Weiss

New **PARTNERS JANUARY 2022**

Michael Buhrman	Thomas Reardon
L. David Law	Lynn Rotz
Michael McAllister	Todd Stonesifer

RETIRED PARTNER

Charles Fabian



EMERGING LEADERS ACADEMY GRADUATES

Travis Bieber
Ryan Hurst
Timothy Kraft
Daniel Nickischer
Joshua Weiss
Ruthann Woll



**NEW TEAM
MEMBERS IN 2021**

109

Team Awards >



Daniel Boyle

PICPA Young Leaders

FUN FACT: Dan studied abroad at Oxford University for a semester while working towards his undergraduate degree in history.



Kathy Gutierrez

Central Penn Business Journal
Women of Influence

FUN FACT: Kathy loves puzzles but will refrain from starting one because once she starts, she can't pull away.



Johnathon Heller

Central Penn Business Journal
Forty Under 40

FUN FACT: John fished in a tournament in the middle of Hurricane Sandy and almost qualified for Bass Master Classic.



Bethany Novis

PICPA Women to Watch

FUN FACT: Bethany was born on Christmas Day.



Thomas Reardon

Lehigh Valley Business
Forty Under 40

FUN FACT: Tom played one year of high school football, when his team won a District gold medal and made the state playoffs for the first time school history.



Steven Matus

Chester County VISTA
Millennial Superstars

FUN FACT: Steve is currently building his retirement home in southern Vermont, though he has many years to go before retirement.



NOW AT HOME IN THE LEHIGH VALLEY

For years, RKL has served the needs of organizations in the Lehigh Valley. Now, we're also proud to call the region home. On November 1, 2021, RKL merged in Allentown-based Stoudt Associates LLC, giving us a deeper bench of local talent and allowing us to better serve the business, management and financial needs of Lehigh Valley organizations and their leaders. As a result of the merger, RKL welcomed 11 professionals, including Partner Michael Stoudt, to our team and added two new offices in Allentown and Bath, PA. Together with our new colleagues, we look forward to helping even more Lehigh Valley organizations take on everyday challenges and prepare for what's next.

Meeting Demand for Workforce **Solutions**

Focused on helping companies meet the challenges of today's business environment, RKL's Human Capital Management (HCM) practice attracted unprecedented interest throughout 2021 from employers seeking to attract, retain and engage their teams. Demand first surged for our specialized HR expertise throughout the pandemic, and continued as employers faced unprecedented workforce and labor market conditions.

To serve its growing client roster, HCM expanded its team and capabilities, which now include outsourced/interim HR support, Human Resources Integrated System selection and implementation, compliance support, policy and procedure design and more.

One of HCM's newest offerings, team engagement surveys, coincides with a desire among employers to understand employee sentiment and gather feedback to improve workplace culture and performance. RKL uses leading technology platforms to not only distribute surveys and collect responses, but also analyze feedback, identify trends and translate the data into actionable recommendations for employers. Partnering with RKL on surveys provides a number of benefits to employers, including confidentiality and anonymity of raw survey data, focused execution and guaranteed follow-through amidst competing priorities.

RKL's continual investments in the latest technologies and our firm's ability to attract specialized expertise helps us lead clients toward better ways to accomplish their workforce and strategic goals.

"Companies are coming to us now and saying 'we know we need to think differently' in order to retain the best talent while still driving profits and winning in the marketplace," says HCM Practice Leader Stephane Smith. "And we're in a unique position to help them do that."

Our RKL HR advisors invest the time to get to know our staff, projects and organizational goals. They are right there by our side, whenever and however we need them to help maximize our people power.

AMANDA MANNING
Human Resources Manager,
Lancaster County Solid Waste
Management Authority



Finding **World-Class** Talent around the Globe >

In the U.S., there is a war for talent in specialized financial disciplines. Around the world, educated and credentialed professionals lack in-country opportunities to grow their careers. RKL is addressing this mismatch with our Global Teaming initiative. This adaptive staffing model drives value for our clients and provides team members with cross-cultural professional experiences. After a successful pilot with our outsourced accounting and valuation practices, RKL expanded the use of global teams to other areas of the firm in 2021.

“A local focus will always be important, but there are also advantages to hiring globally, including a diversity of thought, backgrounds and experience,” notes pilot team member Matt Hartland. Siddharth Jain, Matt’s global teammate, calls working with RKL “the next major step in my career and my best professional engagement to date.” This collaborative and mutually beneficial international talent network makes a real difference and unlocks inspiring possibilities for our firm, our team and our clients.

10

**TEAM MEMBERS
BASED IN INDIA**

A GROWING ALLIANCE

Since its official launch in late 2020, the RKL Alliance grew to 10 members this year. Looking ahead, we hope to focus membership growth on key market geographies. Alliance firms regularly tap into RKL expertise in assurance, tax and consulting and directly refer their clients to our firm for specialized services such as international tax, R&D credits, transaction support, technology, senior living consulting and more.

EXPANDING WESTWARD

The new year is off to strong start at RKL thanks to our January 1, 2022 merger with Chambersburg-based Rotz & Stonesifer, P.C. We are currently onboarding 53 new team members, including four partners, and serving clients from four new offices in Franklin, Adams and York counties. More to come on this westward expansion of our footprint in the 2022 RKL Annual Review.

2021 RANKINGS

#1

**CENTRAL & EASTERN
PA-BASED FIRM**
Accounting Today

#15

MID-ATLANTIC FIRM
Accounting Today

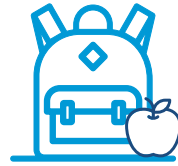
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U.S. FIRM
Accounting Today

A Mission-Driven **Commitment** >

Community engagement isn't about checking a box; it's part of what unites RKL's team and firm culture. Throughout 2021, RKL team members donated their time, talent and resources to address continued areas of need in our communities. Group volunteer projects like the United Way of York County Day of Action made a welcome return and provided team members a chance to work alongside colleagues to help make life a little brighter in the places we call home. We also came together to celebrate the success of charitable giving campaigns like the Extraordinary Give, through which RKL team members personalized their philanthropy across 175 local organizations.





15,976

SCHOOL SUPPLIES COLLECTED
FIRM WIDE

HUNTER MINK

United Way of
York County
2021 Volunteer
of the Year



341

ORGANIZATIONS
FINANCIALLY
SUPPORTED

\$204,949

CONTRIBUTED TO
LOCAL UNITED
WAY CHAPTERS



170
GIFTS DONATED FOR
KIDS AND SENIORS



426 BOXES OF DESSERT
MIXES COLLECTED
FOR FOOD BANKS



Developing Future Servant Leaders >

**MELISSA LONG AND
MATTHEW SMITH**
Leadership Lancaster
Graduates

ROBIN ALEXANDER
Leadership Harrisburg
Area Graduate

**AMY HEIM AND
DIANA RICCI**
Leadership York
Graduates

JUSTIN STOLTE
Leadership Chester
County Graduate

\$113,110

RAISED FOR EXTRAORDINARY GIVE


5,938
TEAM MEMBER
VOLUNTEER HOURS



Firm Leadership >

PARTNERS (AS OF JANUARY 1, 2022)

Amy Gohn Anstine

Paula Barrett

Wade Becker | Capital Region Office Managing Partner

W. Robert Berkebile*

Douglas Berman | York Office Managing Partner

Travis Bieber

Jeffrey Boland

Nicholas Boyer

Michael Buhrman**

Alan Carman

Jonathan Clark

Michael DePaul, Jr.

Francis Donnelly

Michael Eby

Keith Eldredge

Steven Fisher | Audit Service Line Leader, Reading Office Managing Partner

Benjamin Fortner

Robert Gantz*

Jill Gilbert

Robert Gratalo*

Johnathon Heller

Allyson Hornbaker

Jeffrey Horst

Ryan Hurst

Stephanie Kessler

Scott Kimmel | Chief Business Development Officer

Stefanie Knaub

Timothy Kraft

Wendy Lakatos

Wendy Lance | Tax Service Line Leader

L. David Law**

Michael McAllister**

Leonard Metkowsky

D. Hunter Mink

Edward Monborne* | CEO

Ryan Moore

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

Thomas Reardon**

George Reinoehl, Jr.

Clint Rider

Lynn Rotz** | Chambersburg Office Managing Partner

Stephen Runyeon

John Stoner

Todd Stonesifer**

Michael Stoudt, Jr. | Lehigh Valley Office Managing Partner

Steven Weidner

Joshua Weiss

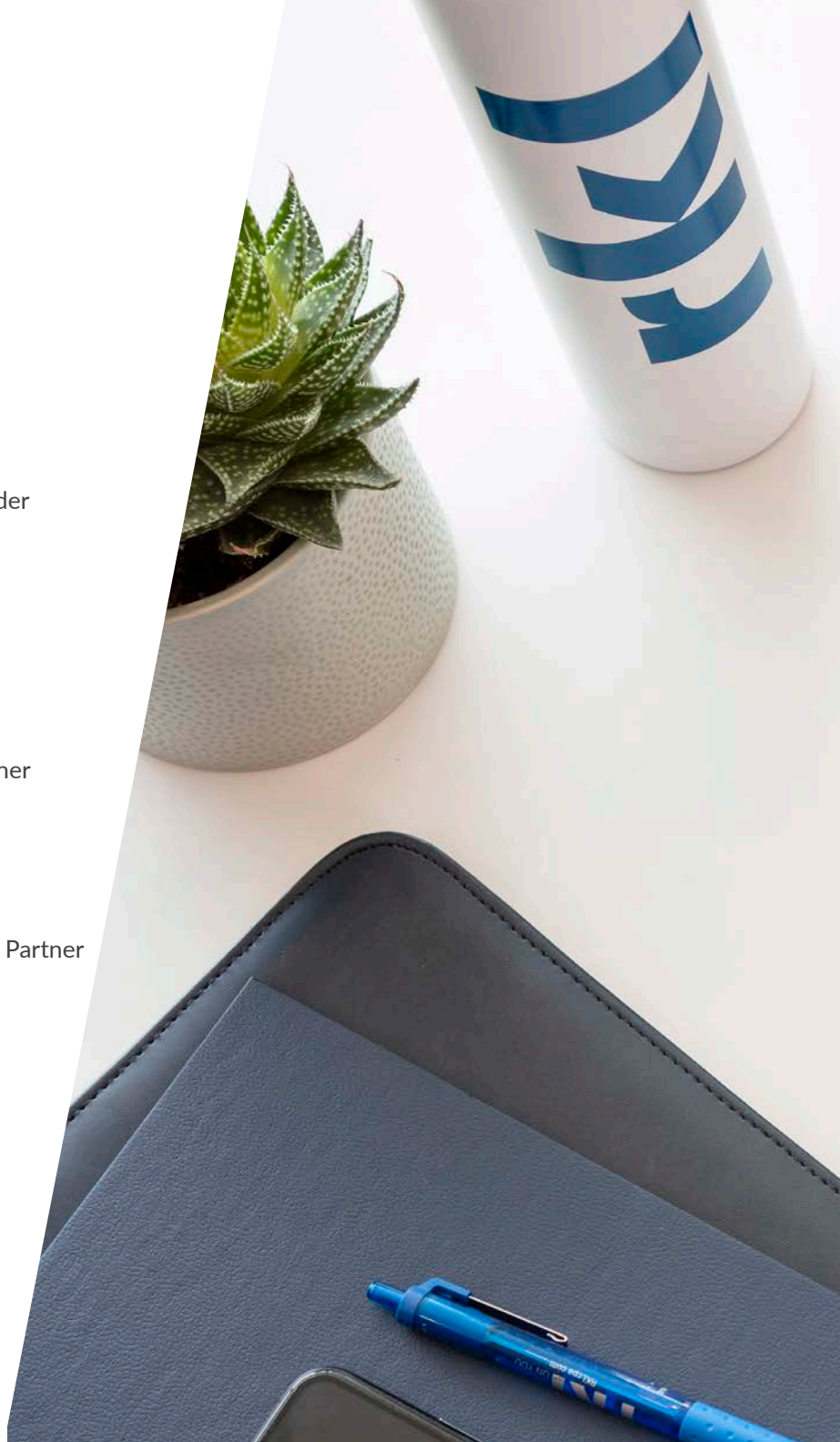
Eric Wenger* | Lancaster Office Managing Partner

Ruthann Woll

Mark Zettlemoyer

**RKL Board of Directors*

*** New Partner January 1, 2022*



PRINCIPALS & PRACTICE LEADERS

Michael Bannasch | State and Local Tax Practice Leader

Kirsten Deeds | International Tax Practice Leader

Michelle Gibbons | Principal, Small Business

Juliya Kofman Greenfield | Principal, Risk Management

Amy Heim | Estates and Trust Practice Leader

Gretchen Naso | Financial Management Solutions and Fair Value Services Practices Leader

William Onorato | Family Office Practice Leader

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

Jason Bachman | Manager, IT Services

Tom Tobias | Sales Director, Sage X3

Michael Nardini | Cloud Sales Director, Eastern Region

Mark Severance | Cloud Sales Director, Western Region

Cliff Horst | Director, Sage X3 Practice

Russ Griffith | Director, Sage 500 Practice

Shannon Sadowsky | Director, Sage 100 Practice

Jason Blankenship | Director, Sage Intacct Practice

Pat Anson | Pre-Sales Engineer, 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



