

rkl



2023

ANNUAL REVIEW >



Welcome to RKL's 2023 Annual Review

As I pause to reflect on the past year at RKL, I am struck by the extraordinary journey we have embarked upon together. This year's Annual Review is less of a recap and more of a testament to the spirit of innovation that defines us.

The year 2023 was a time of exploration and growth. As we ventured into new industries and service offerings, I'm continually impressed by the unity and resilience of our team. From receiving a world-class satisfaction rating from our clients and to being named a "Best Place to Work in Pennsylvania," I'm encouraged by the strength of our team and the trust our clients place in us.

The introduction of our strategic plan, symbolized by the acronym GRIT (Growth, Relationships, Innovation and Team), was a defining moment. It was not just a plan but a commitment to a vision that values sustainable growth, strong relationships and continual innovation.

The past year was not without its hardships—most significantly, the sudden loss of our Chief Business Development Officer Scott Kimmel. Over the past year, we've supported each other during this difficult loss and have joined efforts to ensure Scott's legacy is remembered through the Scott J. Kimmel Memorial Fund.

The following sections delve deeper into the experiences and achievements of our various entities. These stories are reflections on the resilience, collaboration and innovation that have shaped our journey in 2023. I hope they inspire you as they inspire me and reinforce our shared commitment to advancing boldly and shaping our future together.

Sincerely,

ED MONBORNE
RKL CEO



Advancing Boldly, Shaping Our Future >

It's often said that the future belongs to those who invent it. And if this statement holds true, the team at RKL could be viewed not only as accountants, M&A specialists, HR advisors, tech leaders and more, but as a team of true innovators, charting their path to an exciting future for our clients, team and community.

2023 was a year of momentum-building and expansion. While our newest entities gained traction in their growth journeys, we strategically expanded services and new markets. In the fall, our trusted advisors' proactive and thorough service garnered a best-in-class satisfaction rating in a survey of the firm's clients. The year culminated in the roll-out of our strategic plan and being honored once again as a "Best Place to Work in Pennsylvania."



A STRATEGIC LOOK AT WHAT'S NEXT

In 2023, we embraced a new strategic vision that outlines an actionable plan for executing initiatives aligned with the firm's four cornerstones. Approaching this plan under the acronym GRIT (Growth, Relationships, Innovation and Team), each cornerstone has a single overarching objective with strategies and tactics that support its goals.

As we look ahead, we aim to execute a growth strategy that is both profitable and sustainable, and delivers more strategically aligned clients at the end of the year than we do at the beginning. When we think of our client relationships, we want to continually evaluate and improve our processes so RKL is the firm of choice. With the growth and expansion into new markets over the past few years, we will ensure that our team member experience is unparalleled and that everyone is provided opportunities to prosper and guide our clients through change.



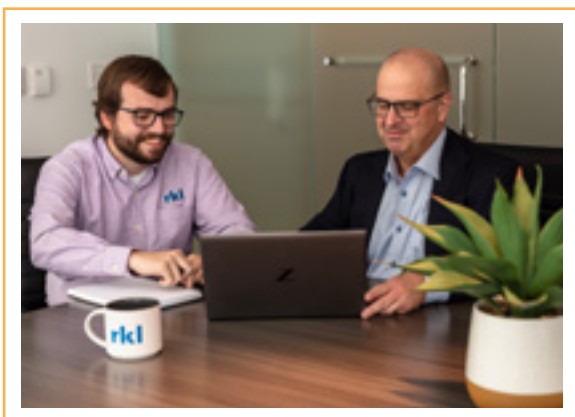
Year-In-Review >



GROWING FOOTPRINTS AND RELATIONSHIPS

Following back-to-back years where the CPA firm grew its geographic footprint in Central and Eastern Pennsylvania, RKL remains committed to strengthening relationships and building awareness in existing and emerging markets for the firm's wide range of services.

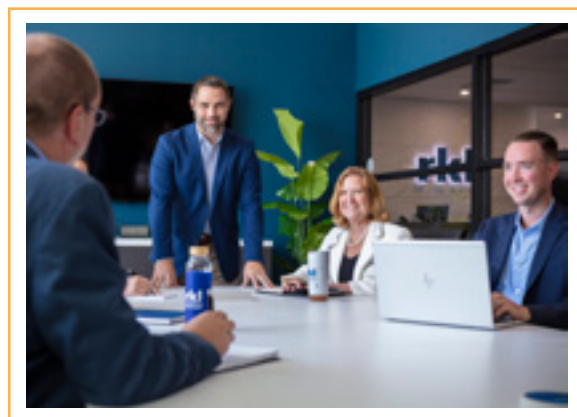
Both our eastern and western footprints—the Greater Lehigh Valley and Greater Chambersburg areas—were galvanized under the RKL brand, bringing new approaches and solutions to their respective marketplaces. Thanks to their perseverance and commitment, our Allentown- and Chambersburg-based teams are making great strides in these new markets.



A YEAR OF GROWTH AND COLLABORATION

When RKL Private Wealth was launched in November 2022, we knew that it would require lots of collaboration, hard work and unconventional thinking to forge a new approach to help individuals and families with complex wealth, tax and business planning needs to achieve their goals for what's next.

In addition to our first anniversary, the RKL Private Wealth team has a lot to celebrate. From onboarding dozens of new Wealth clients to launching The RKL Private Wealth Podcast featuring long-form conversations and practical anecdotes, the successes of the year were made possible through integrated planning and collaboration across service lines and a willingness to adapt to the ever-changing economic environment.





FOCUSED ON WHAT'S NEXT

In fall of 2022, we debuted RKL Virtual Management Solutions, a new entity that helps organizations achieve next-level growth through digitally optimizing accounting, financial management and workforce functions.

The entity capped off a successful first year by launching our new HRIS Solution, powered by isolved, which pairs industry-leading human capital management and payroll technology with onboarding, implementation and support from our deep bench of HR and payroll advisors.

The team also celebrated accomplishments such as creating a college co-op program with Alvernia University,



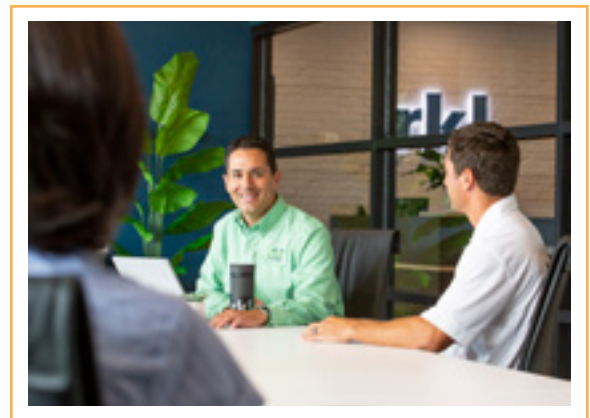
hosting a Workforce Strategies track at the Annual Update and aligning under a new organizational structure. Through the fast-paced environment of our first year, the team remains committed to helping leaders enhance operations, gain insight and build on our success using technology as a catalyst.



EXPANDING INDUSTRY EXPERTISE

Since its inception, RKL eSolutions has played an instrumental role in empowering organizations nationwide to optimize their technology resources and investments.

Over the summer, we welcomed new team members when Greater Philly-based CPA Technology merged into the eSolutions team. Throughout the years, eSolutions has established a nationwide reputation as a trusted technology partner for a wide range of industries, including manufacturing and distribution, not-for-profit, entertainment and senior living among others. With this addition, eSolutions is adding new expertise and experience



in Sage's portfolio of technology solutions for the Construction and Real Estate Development industries. We look forward to making further inroads in this vertical through our firm's deep experience and this team's industry knowledge.

Honoring Our Friend, **SCOTT KIMMEL**

Our collective hearts broke at the outset of the year when we learned of the unexpected passing of our friend and colleague, Scott Kimmel. As Chief Business Development Officer, Scott played a critical role in much of the firm's rapid growth, but we remember him more for his eternal optimism and gracious support both at the firm and in our community. His devotion to people and building connections truly embodied who Scott was, and we are all better for knowing him.

Our firm has supported each other over the last year, continuing Scott's lasting impact of connection and commitment to the firm, our clients and our community. There's not a day that goes by where we don't miss Scott.

In July, we remembered our colleague with the "Celebrate Scott" Golf Outing and Dinner at Lancaster Country Club. Nearly 200 volunteers, golfers and dinner guests came together to share memories and raise over \$100,000 for the Scott Kimmel Memorial Scholarship Fund.



“He was a true supporter – lifting up my voice and giving me opportunities to grow.” **ALLISON SCHLEGELMILCH**



We will forever miss our ‘chief dot connector’—a role that was a testament to his passion and character.

RYAN HURST

“He was a very generous man and was always willing to lend a helping hand or connect you with someone else who could. Scott’s impact on RKL and our firm culture is permanent.”

JOHN STONER

No one remembered is ever gone. I thank you for enriching my life by allowing me to know you.

ED MONBORNE



2023 Firm Accolades >

#1 CENTRAL & EASTERN
PA-BASED FIRM

#36 VAR 100



#10 MID-ATLANTIC FIRM

#34 TOP CPA-AFFILIATED
FIRMS BY AUM

#57 TOP 100 FIRMS



accounting**TODAY**

#15 BEST PLACES TO WORK IN PA
(large companies category)

BEST PLACES
to work in PA

World-Class

NET PROMOTER SCORE

AMERICA'S BEST ACCOUNTING FIRMS

Forbes

#69

INSIDE
public accounting
TOP 100
FIRMS
2023

Team Awards >



ED MONBORNE

Central Penn Business Journal Power 100 & Central Penn Business Journal Power List, Banking and Finance



STEVE FISHER

Lehigh Valley Business Power 100



LAURIE PEER

Central Penn Business Journal Power List, Banking and Finance



MICHAEL STOUTD

Lehigh Valley Business Power List, Banking and Finance





LISA ENDERS

Central Penn Business Journal 40 Under 40



MICHAEL KOCH

Lehigh Valley Business 40 Under 40



WADE BECKER

Named Board Chair of
Capital Region Economic
Development Corporation (CREDC)



ERIC WENGER

Named to Lancaster Chamber
Board of Trustees



ANITRA ROHRER

Igloo Digital Transformation
Awards Culture Champion

Team Member Certifications & Degrees

AARON AYALA

Sage Intacct Accounting Specialist

ADLEY SATTESON

SHRM Certified Professional
(SHRM-CP)

ANGELA LONZETTA

Certified Information Systems Auditor
(CISA)

BRAD STEINWEG

Certified Fraud Examiner (CFE)

DALE BEKKERING

Sage X3 Certified Distribution Consultant,
Sage X3 Certified Manufacturing
Consultant

DAWN LEIS

AAPACN Certification

DEBRA WILLWERT

IRS Enrolled Agent (EA)

DOUG HART

Core Product Certification, Smartsheet

JACOB SPREITZER

Sage X3 Integration Developer Certificate,
Sage X3 Developer Certificate

JAMES SIMERS

Change Management Certification, ATD

JEN MITCHELL

Certified Fraud Examiner (CFE)

JENNIFER PITT

RSM Power BI University, Sage Enterprise
Intelligence Architect, Sage Enterprise
Intelligence Consultant

JOHN HANRAHAN

RSM Power BI University

KAREN HANLEY

Sage Certified Construction Industry
Specialist, Sage Intacct Implementation
Specialist

KARIN SHERMAN

ICD-10-CM Coding Certificate Program
for SNFs, AAPACN

KENNETH JONES

IT Glue Administrator, Kaseya VSA 10

LINDSAY GRADY

Certified Payroll Professional (CPP)

LISA COOK

Sage Intacct Construction Implementation
Consultant Certification, Sage Intacct
Implementation Specialist

MARC HALL

Application of Data Analysis Essentials
Certificate, Data Analytics Modeling
Certificate, Forecasting and Predictive
Analytics Certificate

MARY KAY CAMPBELL

Sage 300 CRE Certified Construction
Accounting Vertical Consultant, Sage 300
CRE Certified Real Estate Implementation
Consultant, Sage 300 CRE Vertical
Certification for Operations Project
Management, Sage Estimating Certified
Consultant, Sage Estimating Certified
Implementation Consultant

MATT ROHRER

Avalara Certified Implementation Partner:
AvaTax for Sage Intacct

NICOLE JANKOWSKI

Certified Strategic HR Leader, AIHR

PAT ANSON

Sage Intacct Construction Certified Sales
Professional, Sage Intacct Distribution
and Manufacturing Operations Sales
Certified Consultant

RYAN HURST

Certified Exit Planning Advisor (CEPA)

SAMANTHA BRAGG

Certified Learning and Development
Specialist, AIHR

SUSAN LAFRENTZ

Sage X3 Certified Manufacturing
Consultant

TODD PARSONS

Sage Intacct Implementation Specialist,
SDMO - Implementation Consultant

TYLER HARRIS

Chartered Alternative Investment Analyst
(CAIA)





2023/2024 NEW FIRM LEADERS

Partners

Walt Goodfield
Cliff Horst
Tom Kaizar
Stephane Smith

Practice Leader

Bryan Redding, Transaction
Advisory Services

Virtual Management Solutions

Practice Leaders

Ryan Coccagna
Lindsay Heist
Amanda Miller
Victoria Pritchard

PASSED CPA EXAM/ OBTAINED CPA LICENSE

Caleb Coker
Olivia Cottle
Autumn Doctor
Sarah Donner
Tyler Forney
Andrew Hipple
Alyssa Kline
Jackie Kreiser
David Ponta
Caleb Putnam
Azalie Roehm
Holly Schultz
Collin Slenker
Christian Smith
Alex Stump

2023 RETIRED PARTNERS/ LEADERS

Amy Anstine
Jim Ostrowski
Clint Rider
Sarah Young Fisher



RKL Core Value:

BOLD

DRIVE INNOVATION | CHALLENGE THE STATUS QUO
HOLD YOURSELF AND OTHERS ACCOUNTABLE



Throughout her life and her career, **Lisa deKat** has always been one to chart her own path. Whether it was embarking on a solo backpacking trip to Europe after high school or making the move from her native California to the rugged and beautiful state of Washington, in many ways, Lisa has always embodied the value of being “bold.”

That's why when a sudden departure in her department at eSolutions occurred, she didn't waste time imagining a better way to help lead and support the team through change and toward better efficiency and collaboration. Without invitation, Lisa developed "Lisa's Perfect World," a comprehensive plan for transitioning key responsibilities, clarifying roles and painting a vision of how her department could weather the disruption and come out of it an even more cohesive unit.

It was a leap of faith, but one that was anchored both in Lisa's confidence and the high level of trust she has for eSolutions President Joe Noll and the broader team.



"I've always been one to speak my mind, speak my truth," Lisa says. "It was a little beyond my comfort zone, but if you don't ask, the answer is automatically no. I've always felt that Joe and the rest of the team have had my back."

Today, Lisa is Administrative Services Manager for eSolutions. In her role, she's responsible for generating weekly billing, overseeing receivables and collections, assisting with the creation of sales orders and quotes, and maintaining customer data. She's excited about continuing to grow and coach her team, no doubt extending the same trust and invitation to be bold to those she works beside.



RKL Core Value:

CARING

LEAD WITH EMPATHY | LISTEN TO UNDERSTAND
LIVE EACH DAY WITH INTEGRITY



In leadership, embodying the value of caring isn't just an attribute but a guiding principle that influences every interaction. While everyone strives to be compassionate when serving clients and their communities, **Jason Blankenship** stands out as a shining example of what it means to be an impactful and empathetic leader.





For Jason, demonstrating care is a professional virtue and a personal commitment. He views his colleagues as more than merely coworkers. To him, his team is an extended family. As Practice Director of Sage Intacct with RKL eSolutions, Jason champions grace and empathy within the workspace, understanding that everyone is navigating their own challenges.

“It’s very important to know the people around you want you to be well and do well,” he said. “Knowing that team members are looking out for you and care about you directly translates into success for the firm and our clients.”

Jason has found that the support for fostering such a culture at RKL starts from the top down. The firm allows for flexibility, acknowledging that life is unpredictable. This flexibility enables the team to extend care beyond mere words, creating a tangible impact in each other’s lives.



When working alongside his team, Jason returns to the golden rule: treat others how you’d like to be treated. Through the stress of work and client demands, it can be easy to forget that we’re all humans dealing with different obstacles. But this motto serves as a reminder that even amidst the long days and endless emails, displaying care and empathy is crucial.

Jason’s commitment to fostering a caring environment proves that true success is rooted in supporting one another.



RKL Core Value: COLLABORATIVE

SEEK OUT VARIOUS PERSPECTIVES

DELIVER PROACTIVE, TEAM-BASED SOLUTIONS

HELP OTHERS ACHIEVE THEIR GREATEST POTENTIAL



As the manager of the RKL softball team in Reading, Senior Associate **Blair Shelton** understands that the power of collaboration goes beyond the workplace when the team takes the field. Not only does this reinforce her dedication to teamwork, but as her fellow teammates can attest, it is a testament to her remarkable ability to bring people together across different areas of the firm.



Blair's journey at RKL began with her navigating the challenges of her first busy tax season, aiming to find her footing amidst the rapid pace. It wasn't until fellow team member Desiree Mauriello took Blair under her wing as a mentor that everything began to fall into place. From that point on, Blair realized she wanted to pay it forward and be a valuable resource in helping her colleagues at the firm.

A self-proclaimed people person, Blair is committed to fostering a collaborative environment, whether training team members new to the firm or providing constructive feedback to help people grow in their roles. She actively participates in firm events, seizing every opportunity to cultivate meaningful relationships.

Recognizing the importance of collaboration within the firm, Blair goes beyond the Tax Services Group to better understand how the firm operates. She actively connects people to best serve our clients and envisions herself as an advocate for the firm's wide range of services. When there is an opportunity to educate a client on another entity, Blair guides them toward someone with deeper knowledge on the matter through her robust network.

"I've learned so much of what I know from building these relationships, and I've found that having a strong network really is the key to learning," said Blair.

Her approach exemplifies a deep understanding of the power of collaboration and connection in achieving success within the firm.



Community Care in **Action** >



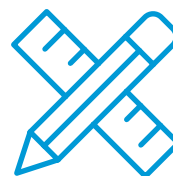
6,343

TEAM MEMBER
VOLUNTEER HOURS



16

WELCOME BASKETS
DONATED TO
LIGHTHOUSE WOMEN
AND CHILDREN'S CENTER



NEARLY

1,000

SUPPLIES COLLECTED
FOR LOCAL SCHOOLS



\$107,000

RAISED FOR THE
SCOTT J. KIMMEL MEMORIAL
FUND AT OUR GOLF EVENT

RKL volunteered with Helping Harvest for their Mobile Market Program, which provides low-income residents with nutritious produce and dairy through Berks and Schuylkill counties.





\$100,173

RAISED FOR 167 ORGANIZATIONS
THROUGH EXTRAORDINARY GIVE

\$212,000+

CONTRIBUTED TO LOCAL
UNITED WAY CHAPTERS



303

ORGANIZATIONS
FINANCIALLY SUPPORTED



\$3,800+

RAISED FOR AMERICAN
CANCER SOCIETY'S
RELAY FOR LIFE

Firm Leadership >

(AS OF JANUARY 1, 2024)

PARTNERS

Wade Becker | Chief Revenue Officer,
Manufacturing and Distribution
Industry Group Leader

W. Robert Berkebile

Douglas Berman | York Office
Managing Partner, Not-for-Profit
Industry Group Leader

Travis Bieber

Jeffrey Boland* | Senior Living
Consulting Industry Group Leader

Nicholas Boyer | Chief Investment
Officer/Executive VP, RKL Wealth
Management

Michael Buhrman

Jonathan Clark

Michael De Stefano | Chief
Operating Officer

Francis Donnelly

Michael Eby | Capital Region Office
Managing Partner

Keith Eldredge | Real Estate Development
and Construction Industry Group Leader

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

Benjamin Fortner | R&D Credit
Practice Leader

Robert Gantz*

Jill Gilbert

Walt Goodfield | Chief Business Officer,
RKL eSolutions

Robert Gratalo*

Allyson Hornbaker

Cliff Horst | Vice President,
Application Support, RKL eSolutions

Jeffrey Horst

Ryan Hurst | Consulting Service
Line Leader

Thomas Kaizar

Stephanie Kessler

Stefanie Knaub

Timothy Kraft

Wendy Lakatosh*

Wendy Lance | Tax Service Line Leader

L. David Law

Michael McAllister | IS Assurance
Practice Leader

Leonard Metkowski

Edward Monborne* | CEO

Ryan Moore | Managing Director,
RKL Virtual

Duane Moyer

G. Scott Myers

Daniel Nickischer | Small Business
Service Line Leader

Joe Noll* | President, RKL eSolutions

Bethany Novis | Managing Partner,
RKL Virtual

Laurie Peer | President,
RKL Wealth Management

Barry Pelagatti | Exton Office
Managing Partner, Financial
Services Industry Group Leader

Thomas Reardon

George Reinoehl, Jr.

Lynn Rotz | Chambersburg Office
Managing Partner

Stephen Runyeon

Stephane Smith | Vice President,
RKL Virtual

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 | Government and
Public Sector Industry Group Leader

PRINCIPALS & PRACTICE LEADERS

Michael Bannasch | State and Local Tax

Ryan Coccagna | Client Advisory
and CFO Services

Kirsten Deeds | International Tax

Michelle Gibbons | Small Business

Juliya Kofman Greenfield | Risk
Management

Lindsay Heist | Workforce Strategies
HRIS Solutions

Michael Koch | Valuations

Amanda Miller | Core Accounting

William Onorato | Family Office

Victoria Pritchard | Technology and
Innovation

Bryan Redding | Transaction
Advisory Services

Deborah Rock | Cost Segregation

RKL ESOLUTIONS

Joe Noll | Partner/President

Bob Gaby | Chief Operating Officer

David Cieslak | Chief Cloud Officer

Walt Goodfield | Partner/Chief
Business Officer

Tom Maurer | Director,
Customer Success

Cliff Horst | Partner/Practice Director,
Sage X3 Practice

Jason Blankenship | Director,
Sage Intacct Practice

Russ Griffith | Director,
Sage 500 Practice

Ben Hofferan | Chief CRE Officer

Michael Nardini | Sales Director,
Sage Intacct Practice

Shannon Sadowsky | Director,
Sage 100 Practice

Mark Severance | Sales Director,
Sage Intacct Practice

Tom Tobias | Sales Director,
Sage X3 Practice

RKL VIRTUAL MANAGEMENT SOLUTIONS

Bethany Novis | Managing Partner

Gretchen Naso | President

Stephane Smith | Partner/Vice President

Ryan Moore | Partner/Managing Director

RKL PRIVATE WEALTH

Laurie Peer | Partner/President

Nicholas Boyer | Partner/Chief Investment
Officer/Executive VP

FIRM ADMINISTRATION

Michael De Stefano | Partner/Chief
Operating Officer

Danielle Bailey | Director of
Business and Asset Management

Kathy Gutierrez | Director of
People Operations

Deanna Higgins | Director
of Administrative Services

Pamela Mahoney | Director
of Information Technology

Allison Schlegelmilch | Director
of Marketing

