

## Firm Profile >

### About RKL >

RKL is a leading advisory firm that helps organizations and their leaders take on everyday challenges and opportunities while preparing them for whatever comes next in their business. We tap into a wide range of services — tax, accounting, financial management, workforce strategies, private wealth, technology and more — to deliver solutions that take organizations to the next level, however they define it.

Fueled by our deep bench of talented professionals and a cross-disciplinary perspective, our innovative approach to serving the needs of our clients continues to earn RKL national accolades and, more importantly, the loyalty of our valued clients, ranging from promising start-ups to leading enterprises.

### RKL ENTITIES



CPA & Advisory | eSolutions | Private Wealth  
Virtual Management Solutions

### # OF RKL TEAM MEMBERS

616



#### MISSION

To enrich the lives of our clients, our team and our community.



#### VISION

RKL aspires to be a collaborative organization working for the collective success and benefit of one another, our clients and our communities.



#### VALUES

Bold, Caring & Collaborative

### A Look At OUR SERVICES >

Tax | Assurance | Transaction Advisory | Succession Planning | Business Consulting | Outsourced Accounting  
Outsourced HR & HR Consulting | Cybersecurity | Technology | Investment Advisory | Financial & Wealth Planning



## Industry FOCUS >

Manufacturing & Distribution | Real Estate Development & Construction  
Financial Services | Not-for-Profit | Government | Senior Living | Franchises



## Next-Level FIRM LEADERSHIP >



**Edward Monborne**  
CEO



**Steven Fisher**  
Leader, Audit  
Services Group



**Wendy Lance**  
Leader, Tax  
Services Group



**Daniel Nickischer**  
Leader, Small Business  
Services Group



**Gretchen Naso**  
President, RKL Virtual  
Management Solutions



**Laurie Peer**  
President, RKL  
Wealth Management



**Joe Noll**  
President, RKL  
eSolutions

## Our LOCATIONS >

### RKL CPA & CONSULTING

- Allentown, PA
- Chambersburg, PA
- East Berlin, PA
- Exton, PA
- Lancaster, PA
- Mechanicsburg, PA
- Reading, PA
- York, PA

### RKL eSOLUTIONS

- Boston, MA
- Lancaster, PA
- Harrisburg, PA
- York, PA
- Reading, PA
- St. Louis, MO
- Edina, MN
- Scottsdale, AZ
- Walnut Creek, CA
- Los Angeles, CA

# AWARDS & RECOGNITION >

**#1 PENNSYLVANIA-BASED  
CPA FIRM**  
*Accounting Today 2023*

**#10 MID-ATLANTIC FIRM**  
*Accounting Today 2023*

**#57 TOP 100 FIRMS**  
*Accounting Today 2023*

**#57 TOP 100 FIRMS**  
*INSIDE Public Accounting 2022*

**#9 BEST PLACES TO  
WORK IN PA**  
*(Large companies category) 2022*

**#35 VAR 100**  
*Accounting Today 2022  
(RKL eSolutions)*



**AMERICA'S BEST  
TAX FIRMS**  
*Forbes 2023*

