



2025

# ANNUAL REVIEW

rkl



# Welcome to RKL's 2025 Annual Review

It is with great pride that I share our 2025 Annual Review—a look back at a year marked by remarkable adaptability, resilience and vision. This year's theme, "Advancing Boldly," captures the spirit with which we embraced change and seized opportunity with a sense of optimism and purpose.

In the face of these complex challenges, our core values never wavered. We remained bold in being advisors for what's next through uncertain times. We remained collaborative in finding integrated solutions and upholding the world-class service that distinguishes our firm. We remained caring in not only supporting our clients, but also the communities we live and work in.

Each achievement you'll read about in these pages speaks to our collective drive to move forward with boldness, collaboration and care.

Reflecting on my 15 years as CEO, I am incredibly proud of the path we have traveled together.

The journey has been defined not just by growth, but by a commitment to supporting one another, our clients and our communities.

Thank you to everyone whose dedication, ingenuity and heart have contributed to RKL's continued success. As you explore this year's review, I hope you feel as proud of what we've accomplished—and as optimistic about our future—as I do.

Sincerely,



**ED MONBORNE**  
RKL CEO



# A Look Back: **BOLDLY** Answering the Call

At RKL, navigating change, facing down challenges and seizing opportunities are core to our DNA. In 2025, we were called to do just this amid sweeping tax policy changes, industry shifts and unprecedented AI and technology advancements.

Over the past year, we managed to set new standards for excellence, grounded in a relationships-centered approach that makes us stand apart in the advisory space.

- As the One Big Beautiful Bill Act (OBBBA) reshaped the tax landscape, RKL delivered timely guidance through “What’s Next” webinars, our OBBBA Resource Center and speaking events—helping thousands of decision-makers navigate change with confidence.
- RKL’s bold commitment to client service was reflected in our 82.8% Net Promoter Score (NPS) from our September 2025 survey, sustaining our “world-class” standard according to ClearlyRated.
- Our world-class experience extends beyond client service—RKL was ranked 8th among large employers in “Best Places to Work in PA,” by The Best Companies Group in October 2025, named Cumberland Valley Business Alliance’s “Employer of the Year” in March 2025 and was recognized as a top employer for internships by the PA Chamber in August 2025.

Beyond these exciting achievements, we kept our eyes on the horizon and envisioned the firm’s bold future through the development of our **Strategic Plan**. Read on to learn more about this forward-looking roadmap.



New Vision & Strategic Plan: ADVANCING

# BOLD

INTO OUR FUTURE

**“WHERE THERE’S CHANGE, THERE’S OPPORTUNITY.” – JACK WELCH**

Change is reshaping the advisory landscape, from evolving regulations and shifting client expectations to new advancements in AI and technology, as well as fierce competition from outside the industry.

At RKL, we view change as an opportunity—embracing fresh ideas and strategies that support our independence and relationship-driven approach. This year’s Strategic Plan, shaped by input from 189 team members, leaders and partners and informed by real-time data, positions us for success and marks an exciting new chapter in our journey.



## *Our Vision & The Meaning* **BEHIND THE WORDS**

Independently owned and anchored in meaningful relationships, we will evolve, innovate and collaborate – creating success together.

- **Independently Owned:** We will be self-reliant and focused on being the sole decision makers for our clients, team and communities. Together, we will determine our future.
- **Anchored in Meaningful Relationships:** We will be resolute, steadfast, strong and unshakeable in our worthwhile, purposeful and substantial connections with our clients, team and communities.
- **Evolve:** We will be adaptable, future-oriented and grow.
- **Innovate:** We will experiment, create and drive change.
- **Collaborate:** We will cooperate, participate and align together.
- **Creating Success Together:** We will execute, build and be consequential for our clients, team and communities, united as one RKL.

### **OUR BOLD GOALS**

- Optimize our service offerings and client portfolio for long-term growth.
- Foster a unified, client-focused advisory culture.
- Drive innovation and integration across entities.

As we collaborate to achieve these goals in the coming year, we encourage each of you to engage with this plan, embrace our shared vision and work together to drive RKL toward continued growth and success.



## CELEBRATING GROWTH AND ENHANCED EXPERTISE

In the **CPA & Advisory** space, RKL continues to earn the trust and respect of organizational leaders through our unwavering commitment to deep industry knowledge, technical proficiency and our advisory approach.

Over the past year, each of our four service lines within CPA & Advisory focused on enhancing the depth of our expertise and specialization.

### HERE ARE SOME OF OUR MOST MEMORABLE MILESTONES:

2025 began with one of the most significant shifts in the tax landscape in recent history: the One Big Beautiful Bill Act (OBBBA). Our **Tax Services Group** launched an OBBBA-focused webinar series and created a robust online tax resource center with timely updates, becoming one of the first firms to deliver a detailed analysis of the new laws. Our International Tax and State and Local Tax teams also expanded, deepening our specialized service offerings.

Our **Consulting Services Group** made greater strides in value enhancement and exit readiness, helping clients prepare for successful transitions and long-term growth. With our focus on helping family-owned businesses, we developed financial education and literacy sessions for their companies' next-generation leaders. Our **Senior Living Services Consulting Group** strengthened relationships and influence across the industry, hosting our inaugural Senior Living Leadership Forum, connecting with hundreds of industry decision-makers at 16 conferences and events and advancing thought leadership content.

# Advancing **Together** Across Our *Firm Entities*



This year, we're celebrating the advancements and achievements across each of RKL's four entities: CPA & Advisory, eSolutions, Private Wealth and Virtual Management Solutions.



Our **Audit Services Group** transitioned to Inflo, our new audit methodology platform. Through hands-on pilot projects and organization-wide education, our team has developed the skills and workflows necessary to maximize data-driven insights and elevate the client experience. These efforts have established a strong foundation for a seamless, innovative audit process.

A key focus for our **Small Business Services Group** was continuing process efficiency and taking a proactive stance on client engagements. These initiatives, coupled with a commitment to collaboration, have laid robust groundwork for delivering high-quality results and supporting our clients' success moving forward.



## WHAT'S NEXT?

- Full-scale rollout of our new audit methodology, introducing advanced analytics and workflow tools to enhance risk assessment and client collaboration.
- Expanding financial education and literacy sessions to support clients' long-term success.
- Increasing cross-collaboration with our Private Wealth team for integrated solutions.





## STRENGTHENING INDUSTRY FOCUS & CLIENT CONNECTIONS

RKL eSolutions focused on strategic alignment and growth this year. We deepened our focus in key industries, including construction, senior living, not-for-profit and entertainment.

### Team **Highlights** & Momentum

The RKL eSolutions team came together at the Georgia Aquarium to build relationships and celebrate their partnerships.





## Strong Industry & Client Partnerships

By working closely with the firm’s industry groups, our team enhanced client engagement and delivery of specialized technology solutions. Our Enterprise Performance Management practice for FP&A software consulting experienced significant growth, enabling clients to gain deeper insights and enhance their financial planning capabilities. We also celebrated our strong client community with a customer event at the Georgia Aquarium during Sage Future, further strengthening relationships and our industry presence.

## Celebrating Milestones & Achievements

This year marked several notable milestones for eSolutions, including the 15th anniversary of our first acquisition, Waterview IT. Our commitment to excellence was also recognized through multiple awards, including being named Solver’s “Breakout Partner” for 2025, achieving Top 10 ranking for Sage Intacct Construction and all Sage Intacct verticals in North America and being honored as a Sage Platinum Club Partner Award winner.

## Launching **NEW** Solutions

We continued to drive progress through service expansion and innovation. We welcomed Rebdev LLC to our team, broadening expertise and capacity in the Sage X3 space. Our commitment to creating value for clients was further demonstrated with the release of RebelScan WMS for Sage X3—our proprietary warehouse management solution. Additionally, we successfully transitioned from Sage 500 to Sage Intacct, developing and implementing a new time entry and billing system to streamline and enhance client operations.



## WHAT’S NEXT?



- Expanding key industry expertise to better serve current and future clients.
- Curated customer networking experiences and educational events.
- Continuing to optimize the customer journey from implementation to support.



## ACHIEVING NEW MILESTONES AND CELEBRATING PROGRESS

2025 marked another year of progress for RKL Private Wealth, highlighted by surpassing \$2.5 billion in assets under management (AUM) as of December 2025. In June 2025, we secured the 35th position on Accounting Today's national ranking of Top CPA Affiliated Firms by AUM, based on AUM as of December 2024. These achievements reflect purposeful growth, collaborative team development and a deepened commitment to serving clients through events, expanded services and forward-thinking solutions.





## Strength in COLLABORATION & CONNECTION

Our continued success was fueled by a collaborative, holistic approach across the firm. Highlights of the year included our signature client events in Lancaster, York, Reading and Chambersburg, where we brought together over 100 attendees for meaningful dialogue on market updates, tax strategies and estate planning.

## Advancing Boldly Toward the Future

As we look to 2026, we're focused on advancing service offerings to meet the evolving needs of our clients. Private Wealth is prioritizing Family Office Services and enhancing our consolidated reporting platform, providing comprehensive solutions for governance, family education and alternative investments. With an eye toward innovation and growth, we remain committed to delivering value and guidance that help clients protect and grow their legacies.



## WHAT'S NEXT?

- Enhancing our consolidated reporting platform to deliver more comprehensive and actionable insights.
- Expanding governance and family education resources to support long-term legacy planning.
- Strengthening collaboration across firm entities to provide integrated solutions for our clients.



## INNOVATION, SPECIALIZATION AND CONNECTION

For RKL Virtual Management Solutions, our outsourced accounting, HR and payroll entity, 2025 was a year of growth. We continued to grow our top-line revenue while making meaningful advancements in our service delivery, industry specialization, technology adoption and team development.

### ADVANCING Industry Specialization

We accelerated our focus on key sectors, notably driving expansion in the Not-for-Profit (NFP) industry. Dedicated industry teams and tailored training initiatives strengthened our expertise and promoted standardized best practices. Our participation in the Build a Better Agency Summit further extended our reach, positioning RKL Virtual as an advisor of choice for creative agencies.

### AUTOMATING for Impact

RKL Virtual invested strategically in technology solutions to further elevate our service model. We enhanced our AI-driven tech stack, championing “automating for impact” as a guiding principle. These advancements enabled us to deliver scalable, efficient and insightful services for clients, positioning us at the forefront of digital transformation in the accounting sector.

### INVESTING in Team & Culture

Our team grew in both depth and breadth, welcoming 12 new professionals with specialized expertise. The third annual all-team meeting at Spooky Nook fostered connection and professional development, featuring workshops and community engagement. Throughout the year, we honored several team members whose bold, collaborative and caring spirit drives our culture, reinforcing our shared values through the Cultural Compass Awards.



## WHAT'S NEXT?

- Pursuit of strategic, disciplined growth within our core industries, including NFP, real estate and creative agencies.
- Expansion of CFO Advisory services.
- Continued investment in automation and technology to further elevate service delivery.
- Team upskilling and training to strengthen client relationships.



# Core Values in ACTION

The stories that follow highlight six RKLers not for the work they've done inside the office, but for all they've done outside the office. **Bold** in the face of adversity, deeply **caring** toward others and uncommonly **collaborative** in bringing people together, these RKLers bring our core values to life.

## SARAPH SAINT-FORT

Tax Associate | Bold

Saraph arrived in the U.S. from Haiti in 2007, just a day before the Fourth of July. It was a patriotic start to life in the U.S. — not to mention his first time eating a burger.

Like most who come to the U.S., Saraph says he and his family were in search of better opportunities and education. He was a permanent resident for most of his time here and became a U.S. citizen in September.

“As a permanent resident, I could do pretty much anything else that a U.S. citizen could do, except voting,” said Saraph. “That’s the number one perk you have as a citizen. Now that I have my citizenship, I feel like I have a voice in being able to vote.”

But the thing Saraph is most excited for? Travel. With his citizenship, he can travel worry-free, something he hasn’t done since he arrived in the U.S. in 2007.

“I haven’t been out of the country since I came to the U.S.,” said Saraph. “The very next day after I got my citizenship, I booked a trip to the Dominican Republic. I want to go to South America next... maybe after the next tax season.”



“NOW THAT I HAVE MY CITIZENSHIP, I FEEL LIKE I HAVE A VOICE.”

# SHELBY JURY

Retirement Plan Advisor,  
RKL Private Wealth | Collaborative

Shelby got her first pit bull in 2019, when she and her fiancé rescued Odin, a pup abandoned in an apartment after his owner moved out.

“Odin is the reason I chose Pitties Love Peace,” said Shelby. “Yes, we’re helping pit bulls, but we’re also educating people on the breed because a lot of people think poorly of them.”

Shelby started volunteering with Pitties Love Peace, an organization dedicated to the rescue, education and advocacy of pit bulls and bully breeds, in 2023.

“The biggest misconception is that pit bulls are aggressive or that they’re not a nice breed, and it’s just not true,” said Shelby.

While Pitties Love Peace helps a lot of dogs, there’s only so much they can do, Shelby says.

“People don’t realize that most rescues don’t have a physical shelter. For every dog we pull out of the shelter, we need a foster family available. Shelters often only hold dogs for 30 days.”

When a family wants to adopt a dog through Pitties Love Peace, Shelby does house visits to ensure the family and home are prepared for a dog.

“My favorite part is seeing these dogs go to their forever homes,” said Shelby. “Sometimes I get to see them again at events, happy with their families. I love seeing dogs in their forever homes and knowing that I helped them get there.”

“PIT BULLS  
DESERVE A  
HOME AND  
LOVE, TOO.”



# GREG HARP

Partner, Audit Services | Caring

Greg Harp joined RKL in 2023, in the midst of his battle with multiple myeloma, a form of blood cancer.

“So many things go through your mind when someone tells you that you have cancer,” said Greg. “You start imagining, ‘what’s going to happen to my daughters if I’m not there?’ I’m much more intentional with family now, and giving back is critical.”

The support Greg received during his diagnosis inspired him to give back. He served as an Executive Coach for Light the Night Lehigh Valley, an event hosted by Blood Cancer United, that honors, celebrates and remembers those affected by blood cancers. Next year, he’ll serve as the Executive Leader for the event.

“I remember how I felt navigating everything. It’s expensive. There are people who don’t know how they’re going to pay for their next treatment,” said Greg. “I want to help as many people as possible navigate that.”

## RKL/Harp's Heroes

“BLOOD CANCER HAS IMPACTED MY LIFE, BUT IT’S NOT GOING TO DEFINE WHO I AM.”



# DANI BAILEY

Director of Business and  
Asset Management | Bold

Dani Bailey has been to the top of the world.

With her Jeep parked on the edge of a thousand-foot drop off at The Top of the World trail in Moab, Utah, she snapped an epic photo before wheeling back down the trail.

“Yeah, it was scary. Some of the jeeps got stuck, but we never leave a man down,” said Dani. “There’s just so much to explore.”

Dani got her first Jeep in 2015 and has been wheeling ever since.

She’s climbed over boulders the size of her Jeep in Black Hills, South Dakota. She goes waterfall chasing, locating them on a map and maneuvering down dirt roads to find them.

“I’ve broken a U-joint, popped a tire... but that’s kind of the charm of it,” said Dani. “You get all these nice scratches and epic pictures.”

She’s on the Board of Directors of PA Jeeps Inc., an organization that promotes off-roading activities (aka wheeling) and family four-wheeling fun.

“The Jeep community is just massive. There are people from all over the world who love wheeling,” said Dani. “It’s challenging and scary and fun at the same time. After every adventure, you’re like ‘Wow, I just did that!’”

“I’VE BROKEN  
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— BUT THAT’S  
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CHARM OF IT.”



# STEFANIE DEITER-PRINTZ

Workforce Strategies Senior Consultant,  
RKL Virtual | Collaborative

Stef Deiter-Printz grew up near Genesis Theatre, a community cornerstone in Reading, that unites actors from ages 7 to 70.

As a child, Stef's passion for musicals and theater drama led her to support her high school productions from behind the scenes, assisting with makeup and costumes.

Today, she continues her commitment to the arts in a leadership capacity, serving as President of the Genesis Board of Directors.

Within her first year on the board, Stef was instrumental in refining the organization's mission, updating its bylaws, expanding board membership and implementing robust accounting practices.

"As someone born and raised in Reading, it's important to me to give back to the community and contribute to its revitalization," said Stef. "Genesis presents outstanding shows and welcomes actors of all ages and backgrounds."

Stef affirms that the theatre's mission—established in 1971—remains unchanged: everyone, from children to experienced performers, is invited to participate. Auditions are open to the entire community, and each production showcases the remarkable talent and diversity found within Reading's arts community.

"Our creative team brings something exceptional to every show. Witnessing individuals from all generations share the stage and seeing former Genesis participants return to mentor new talent is what sustains the theatre's enduring legacy," said Stef.



"EVERY  
PRODUCTION  
IS SO SPECIAL...  
SEEING PEOPLE OF  
ALL AGES COMING  
TOGETHER ON  
STAGE."

# ANGELA RYAN

Business Development Specialist,  
Firm Administration | Caring

Single mothers turn to Clare House when they don't know where else to go. They can't afford rent, so, with their children in tow, they seek out a safe space to live.

Clare House provides transitional housing for mothers and children facing homelessness. Angela Ryan is on the board and is grateful to give back to an organization that helps families in need.

"Housing is an issue in Lancaster, and women and children are most vulnerable. I love supporting an organization that helps women get back on their feet," said Angela.

Clare House is a small organization, but its impact is growing. Since Clare House relies, in part, on donations, both to sustain its current home and open a recently purchased new home, finding donors and spreading awareness is more important than ever.

"We have a waitlist that is really challenging, since we can only house seven women at a time. Hearing the women's stories and the struggles they go through has really impacted me," said Angela.

Through her position on the board, Angela has brought new donors to Clare House and helped raise awareness for the organization by fostering relationships within the community.

"I love how much RKL has encouraged me to give back," said Angela. "This is my first real board position, and it's because of the encouragement and flexibility of RKL."



"I LOVE  
SUPPORTING AN  
ORGANIZATION  
THAT HELPS  
WOMEN GET BACK  
ON THEIR FEET."



SCAN to watch a former  
Clare House resident &  
her son take a tour of  
their new home.





RKlers from five office locations ran in support of the Lancaster and York YWCA's Race Against Racism 5K to help eliminate racism and promote equity.



Our teams volunteered at the United Way Day of Caring in the Capital Region, York & the Lehigh Valley



We donated gently used computers to the Da Vinci Center for Science.

RKL Catalyst participants stuffed and donated "RKL Bears that Care" to local organizations.



New team members made gift baskets for Hope Inspire Love Inc., an anti-human trafficking organization in Lancaster.

Our Reading team supported United Way of Berks County and Big Brothers Big Sisters Berks County by making and donating no-sew blankets, providing comfort for those in need.



Our York office participated in the YMCA of the Roses clean-up, painting the bridge at the Graham Aquatic Center and refreshing multiple spaces in the YMCA Men's Residence.

Our Lancaster office raised \$102,668, supporting 197 organizations for ExtraGive



# Community Care in ACTION



**10,000+**

Team member volunteer hours



**\$894,405**

Dollars raised for our communities



**316**

Organizations financially supported



**250**

Teddy bears donated to medical centers & hospitals



**1,937**

Books donated to the Lancaster and Lititz area libraries.

# 2025 Firm ACCOLADES

**#1** CENTRAL & EASTERN PA-BASED FIRM

**#9** MID-ATLANTIC FIRM

**#58** NATIONWIDE

accountingtoday  
**2025 Top 100 Firms**



**'25** TOP FIRMS BY AUM  
(RKL Wealth Management)



**'25** AMERICA'S MOST RECOMMENDED TAX FIRMS  
USA TODAY



**'25** VAR 100  
(RKL eSolutions)



**'25** BEST OF ACCOUNTING AWARD  
Based on our World-Class Net Promoter Score of **82.8%**

**'25** EMPLOYER OF THE YEAR  
 CVBA ALLIANCE



**'25** TOP 100 FIRMS  
Inside Public Accounting

**'25** GREATEST PLACES TO INTERN IN PA  
2025  
 GREATEST PLACES TO INTERN AWARDS

**#8** BEST PLACES TO WORK IN PA  
(large companies category)  
**BEST PLACES to work in PA**

**'25** AMERICAN GRAPHIC DESIGN AWARDS DUAL WINNER  
GDUSA  
 GDUSA GRAPHIC DESIGN USA

**#7** TOP "MOST ACTIVE ACCOUNTING PROFESSIONALS ON SOCIAL MEDIA"  
Nationwide  
 DSMN8

# 2025 Team AWARDS



**MICHAEL  
ANDREWS**

CPBJ's Forty under 40



**PAIGE  
BOWERMASTER**

GDUSA's Person to Watch



**KIRSTEN  
DEEDS**

CPBJ's Women of Influence



**MIKE DE STEFANO**

CPBJ's Power List for Banking,  
Accounting & Finance



**STEVE  
FISHER**

LVB's Power 100 List



**MIKE STOUTD**

LVB's Power List for  
Banking and Finance



# Team Member Certifications & Degrees

## **MARIAH BATESON**

American Academy of Professional Coders

## **ELENA BELLO**

Sage 100 Technical Consultant Certificate  
Sage 100 Financial and Distribution Consultant Certificate

## **SAMANTHA BRAGG**

Master Instructional Designer – Association of Talent Development  
SDI Certified Facilitator – Crucial Learning

## **REED BRUNER**

Certified Financial Planner (CFP) – CFP Board

## **MICHELLE BUMBAUGH**

Certified QuickBooks Level 2 ProAdvisor

## **JACOB CAHILL**

IRS Enrolled Agent (EA) – Internal Revenue Service

## **MARY KAY CAMPBELL**

Sage Intacct Construction Certified Implementation Consultant  
Sage Construction Management Certified Implementation Consultant

## **STEVE CUSTER**

Certified Implementor – DataBlend

## **LISA ENDERS**

Prosci® Certified Change Practitioner  
Data Analytics for Business Professionals  
Microsoft Excel Fundamentals + Data Analytics

## **KRISTY FERRARO**

Accredited Estate Planner – National Association of Estate Planning Councils

## **KAREN GAYMAN**

IRS Enrolled Agent (EA) – Internal Revenue Service

## **STEPHEN HART**

Master of Taxation – Villanova University

## **YENMA HERB**

Certified Data Management Professional (Associate) – DAMA International  
Prosci® Certified Change Practitioner

## **IVONNE HERNANDEZ**

Workflow Specialist Certification – Asana Academy

## **SARAH HEVERLY**

IRS Enrolled Agent (EA) – Internal Revenue Service

## **JESSE KINCAID**

Security + – CompTIA

## **DAWN LEIS**

Resident Assessment Coordinator – Certified Advanced (RAC-CTA) – American Association of Post-Acute Care Nursing (AAPACN)

## **TINA LEONARD**

Sage Construction Management Certified Implementation  
Sage Intacct Construction Implementation  
Sage Intacct Implementing Projects  
Sage Intacct Implementation Specialist  
Understanding Construction Workflows for Implementation – Sage

## **KATELYN LONG**

IRS Enrolled Agent (EA) – Internal Revenue Service

## **CHRISTINA MARTUCCI**

Certified Anti-Money Laundering Specialist – ACAMS

## **TYLER MEYERHOFFER**

HR Consulting Skills – Academy to Innovate HR

## **DENISE MOTTOLA**

Bookkeeping Certification – Intuit  
QuickBooks Online Certification Level 1

## **ERIN MOUL**

Sage 100 – Payroll Certified Consultant

## **DANIEL MUTURI**

Clinical Medical Assistant Certification (CMAC) – Relias  
Resident Assessment Coordinator – Certified Advanced (RAC-CTA) – American Association of Post-Acute Care Nursing (AAPACN)

## **LAURA NAUM**

Workplace Safety Certification Training – Pennsylvania Department of Labor and Industry



**JENNIFER PARSONS**

Resident Assessment Coordinator  
– Certified Advanced (RAC-CTA) –  
American Association of Post-Acute Care  
Nursing (AAPACN)

**ABIGAIL POKRYWA**

SHRM Certified Professional (SHRM-CP)  
– Society for Human Resources

**ROBIN RABER**

Notary – Commonwealth of Pennsylvania

**CHRISTINA REPINE**

Resident Assessment Coordinator (RAC-  
CTA) – American Association of Post-  
Acute Care Nursing (AAPACN)

**MATT ROHRER**

Project Management Professional (PMP)  
– Project Management Institute

**JAMES RUFFIN**

ISO/IEC 27001:2022 Lead Auditor -  
Mastermind Assurance

**SKYE SELGRADE**

Compensation Fundamentals – Payscale  
Core Product Certified – Smartsheet

**JEN SHELLENBERGER**

IRS Enrolled Agent (EA) – Internal  
Revenue Service

**BLAIR SHELTON**

IRS Enrolled Agent (EA) – Internal  
Revenue Service

**JAMES SIMERS**

Data-Driven Change Management –  
The Change Decision

**SARAH STEHMAN**

HubSpot Marketing Software Certification  
Social Media Marketing Certification –  
HubSpot

**JORDAN ZIMMERMAN**

QuickBooks Online Certification Level 2

**PASSED CPA EXAM/  
OBTAINED CPA LICENSE**

**EMILTON CORTES**

**ALEXANDER CRUISE**

**SHADY FAHIM**

**BREANNA FRANKENFIELD**

**TYRUS KAUFFMAN**

**TYLER MORRIS**

**MATTHEW PIATT**

**ROBERT SMELTZ**

**BENJAMIN WALMER**

**ALEXANDER WEESE**

**ELI ZWEIZIG**



# Firm Leadership >

(AS OF JANUARY 1, 2026)

Edward Monborne\* | Partner & CEO

## CPA & ADVISORY

### PARTNERS

Michael Andrews | Tax

Wade Becker | Chief Revenue Officer

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

Travis Bieber | Audit | M & D Industry  
Group Leader

Jeffrey Boland\* | Consulting | Senior Living  
Services Consulting Industry Group Leader

Michael Buhrman | Small Business |  
Chambersburg Office Managing Partner

Jonathan Clark | Tax

Kirsten Deeds | Tax | International Tax  
Practice Leader

Michael Eby\* | Tax | Capital Region Office  
Managing Partner

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

Benjamin Fortner | Tax | R&D Credit  
Practice Leader

Robert Gantz | Small Business

Jason Gerber | Small Business

Robert Gratalo\* | Tax

Gregory Harp | Audit

Joel Harnly | Tax

Allyson Hornbaker | Audit

Jeffrey Horst | Tax

Ryan Hurst | Consulting | Service  
Line Leader

Thomas Kaizar | Tax

Kimberly Karwath | Audit

Stephanie Kessler | Consulting

Stefanie Knaub | Consulting

Timothy Kraft | Audit

Wendy Lakatosh\* | Audit

Wendy Lance | Tax | Service Line Leader

L. David Law | Small Business

Lindsey Marchant | Consulting

Michael McAllister | Audit | IS Assurance  
Practice Leader

Duane Moyer | Small Business

G. Scott Myers | Tax

Nolan Myers | Small Business

Daniel Nickischer | Small Business | Service  
Line Leader | Construction and Real Estate  
Development Industry Group Leader

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

George Reinoehl, Jr. | Small Business

Stephen Runyeon | Audit

Michael Stoudt, Jr. | Small Business | Lehigh  
Valley Office Managing Partner

Joanne Szupka | Audit

Joshua Weiss | Tax

Eric Wenger\* | Tax | Lancaster Office  
Managing Partner

Ruthann Woll | Tax

## PRINCIPALS & PRACTICE LEADERS

Lacy Albright | Consulting | Medical Billing  
Practice Leader

Juliya Kofman Greenfield | Audit | Risk  
Management Principal

Stephanie Kane | Tax | Tax Market Leader

Michael Koch | Consulting | Valuation  
Practice Leader

Matthew Piatt | Tax | State and Local Tax  
Practice Leader

Bryan Redding | Consulting | Transaction  
Advisory Services Practice Leader

Deb Rock | Tax | Cost Segregation



## RKL ESOLUTIONS

[Joe Noll\\*](#) | Partner | President

[Walt Goodfield](#) | Partner | Chief Business Officer

[Cliff Horst](#) | Partner | Practice Director, Sage X3 Practice

[Bob Gaby](#) | Chief Operating Officer

[David Cieslak](#) | Chief Cloud Officer

[Ben Hofferma](#) | Chief CRE Officer

[Jason Blankenship](#) | Practice Director, Sage Intacct

[Russ Griffith](#) | Practice Director, Sage 500

[Shannon Sadowsky](#) | Practice Director, Sage 100

[Marc Hall](#) | Business Intelligence

[Brandon Siegfried](#) | Systems and Infrastructure

[Laura Atkins](#) | Marketing



## RKL PRIVATE WEALTH

[Laurie Peer](#) | Partner | President

[Brandon Adams](#) | Partner | Chief Investment Officer

[David Morais](#) | Partner | Wealth Advisory

[Thomas Reardon](#) | Partner | Wealth Advisory

[Julie Englert](#) | Chief Compliance Officer | Managing Director, Operations

[William Onorato](#) | Practice Leader, Family Office | Managing Director, Wealth Strategy

## RKL VIRTUAL MANAGEMENT SOLUTIONS

[Gretchen Naso](#) | President

[Ryan Moore](#) | Partner | Vice President, Financial Management Services

[Stephane Smith](#) | Partner | Vice President, Workforce Strategies

[Lindsay Heist](#) | Practice Leader

[Amanda Miller](#) | Practice Leader

[Victoria Pritchard](#) | Practice Leader

[Jordan Zimmerman](#) | Practice Leader

[Tina Heinnickel](#) | Practice Leader

## FIRM ADMINISTRATION

[Michael De Stefano](#) | Partner | CEO-elect

[Rachel Sargent](#) | Partner | Chief Operating Officer

[Danielle Bailey](#) | Director of Business and Asset Management

[Brad Bowers](#) | Director of Finance

[Stacie DeJesus](#) | Director of Client Success

[Kathy Gutierrez](#) | Director of People Operations

[Deanna Higgins](#) | Director of Administrative Services

[Pamela Mahoney](#) | Director of Information Technology

[Allison Schlegelmilch](#) | Director of Marketing





Cover models left to right:

Row 1 | Jacquelyn Kreiser, Taylor Marion, Viola Youssif, Dong Choe

Row 2 | Jose Rosado, Laura Atkins

Row 3 | Allison Schlegelmilch, Michael Koch

Row 4 | Ruchi Borger, Michael Andrews, Angela Ryan, Andy Osika