

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 nearly 700 talented professionals and 53 Partners, 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.



#### MISSION

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



#### VISION

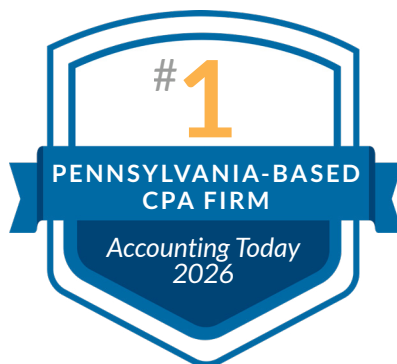
Independently owned and anchored in meaningful relationships, we will evolve, innovate and collaborate – creating success together.



#### VALUES

Bold, Collaborative & Caring

## AWARDS & RECOGNITION >



AMERICA'S MOST RECOMMENDED TAX FIRMS  
USA TODAY 2026



## A Look At **OUR SERVICES**

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



## Industry **FOCUS**

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



## Our **LOCATIONS**

- Allentown, PA
- Bala Cynwyd, PA
- Capital Region, PA
- Chambersburg, PA
- Exton, PA
- Lancaster, PA
- Reading, PA
- Pittsburgh, PA
- Simi Valley, CA
- York, PA

## 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



**Laurie Peer**  
President, RKL  
Private Wealth



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



**Joe Noll**  
President,  
RKL eSolutions

