

Rehmann Overview

OFFICE LOCATIONS

Ann Arbor, MI	734.761.2005
Bonita Springs, FL	239.992.6211
Cheboygan, MI	231.627.3143
Detroit, MI	313.202.7400
Grand Rapids, MI	616.975.4100
Hastings, MI	269.945.9452
Ionia, MI	616.522.0792
Jackson, MI	517.787.6503
Jupiter, FL	561.694.1040
Lansing, MI	517.316.2400
Muskegon, MI	231.739.9441
Orlando, FL	407.843.4433
Richland, MI	269.629.9658
Saginaw, MI	989.799.9580
Stuart, FL	772.283.7444
Toledo, OH	419.865.8118
Traverse City, MI	231.946.3230
Troy, MI	248.952.5000
Vero Beach, FL	772.234.8484

At Rehmann, we combine our knowledge and experience to resolve the challenges our clients face. We provide forward-thinking solutions and immerse ourselves into our client's business. At the end of the day, we help our clients achieve their goals.

PROFESSIONAL SERVICE LINES

Advisory & Tax and Assurance

- Tax advisory, compliance and preparation
- Specialized tax focus (R&D, SALT, international, cost segregation, M&A, estate & trust)
- Assurance and financial reporting
- Strategic business planning and advisory

Managed Services and Outsourcing Solutions

- Finance and accounting solutions
- Technology solutions (managed security, IT, cloud and networks)
- Human resource solutions

Private Client Advisory (PCA)

- A holistic, uniquely tax-aware approach to growing and protecting the wealth of individuals with assets, family offices, and/or business owners.
- For each client, PCA customizes a cross-functional team of seasoned specialists — in niche areas of tax, investing, risk, finance, business, estate planning, and more — to proactively minimize risk, uncover and maximize opportunity, and ensure each client, their family, and/or business is always on the optimal path forward.

Specialized Consulting

- Corporate investigations and security
- Business valuation
- Turnaround, restructuring and insolvency
- Litigation support

Wealth Management*

- Asset management and financial planning
- Risk analysis and evaluation of insurance coverage
- Planning and analysis for retirement, estate and education savings

Founded in
1941

160+ Number of principals

1,000+ Number of associates

 **204 million**
Total revenue in 2023

INDUSTRIES SERVED

Rehmann serves a wide range of clients. A full list of industries can be found on rehmann.com.

- Manufacturing
- Healthcare
- Private Equity
- Individuals & Private Client Advisory
- Financial Services
- Construction
- Not-for-Profit
- Commercial
- Government
- Education

HLB INTERNATIONAL

Rehmann is an independent member of HLB, the global advisory and accounting network. Founded in 1969, HLB is a global network of advisory and accounting firms. Their commitment to quality and excellence has been the driving force in helping clients grow across borders, offering audit and assurance, tax and a wide range of advisory services. Learn more at <https://www.hlb.global/>.

*Securities offered through Rehmann Financial Network, LLC, member FINRA/SIPC. Investment advisory services offered through Rehmann Wealth, a Registered Investment Advisor.

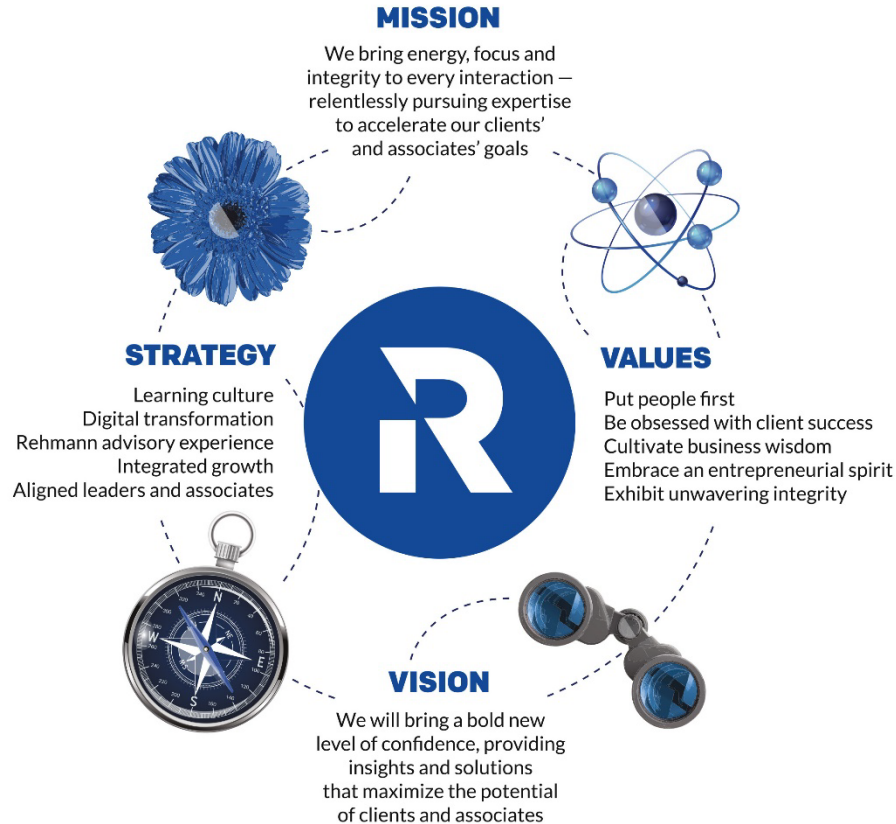
Rehmann

HISTORY & VALUES

Rehmann is a professional advisory firm that provides accounting and assurance, business solutions and outsourcing, specialized consulting, and wealth management services. For over 80 years, Rehmann has provided forward-thinking solutions to our clients. With over 1,000 associates in Michigan, Ohio, and Florida, we are the momentum behind what's possible. We focus on the business of business – allowing organizations to focus on what makes them extraordinary. We help you look to the future with confidence, thanks to our unrivaled expertise and integrity. Through our partnerships with our clients and communities, we drive impact that empowers our world.

Rehmann has grown to become one of the largest financial services and advisory firms in the country.

- 1941 | Inception of the firm.
- 2008 | First office in Florida is opened.
- 2010 | First office in Ohio is opened.
- 2011 | Women's Initiative Network (WIN) formed.
- 2016 | Firm celebrates 75th anniversary and Stacie Kwaiser becomes first female COO.
- 2017 | Rehmann Club opens at Little Caesars Arena.
- 2018 | Technology solutions division launches.
- 2020 | Firm-wide rebrand launches, Empower Your Purpose.
- 2022 | Rehmann Foundation launches and first grants are awarded.
- 2023 | Stacie Kwaiser becomes first female CEO and Stephen Blann becomes COO.



INDUSTRY EXPERIENCE

PUBLIC SECTOR EXPERIENCE

Rehman has a dedicated group of more than 80 professionals exclusively serving clients in the public sector. Together, they will anticipate your needs and provide customized solutions that fit your objectives and budget. Rehmann is the trusted advisor team for government entities, K-12 education, higher education, and not-for-profit entities, assisting you in meeting the challenges of an evolving landscape.

WE SERVE APPROXIMATELY

1,000

**PUBLIC SECTOR ENTITIES
FIRM-WIDE**

REHMANN INVESTED

162,000+

**HOURS IN THIS SECTOR
OVER THE PAST YEAR**

SERVICES INCLUDE:

- Audit and financial reporting
- Federal and state compliance
- Organizational development and operations consulting
- Pension and retirement plan services
- Technology and cybersecurity solutions
- CFO and accounting solutions
- Human resource solutions
- Investment advisory services
- Internal audit
- Internal controls
- Background investigations
- Fraud and forensic accounting

HIGHER EDUCATION AND K-12 EXPERIENCE

Rehmann is a dedicated and trusted advisor to clients in the education sector. We have extensive experience providing financial consulting and advisory services to educational institutions of all types. We currently serve **27 higher education institutions** and **over 60 K-12 schools** in total, which includes universities, community colleges, higher education private institutions, K-12 public school districts, and K-12 private schools. Several advisors on our team spend all or a substantial portion of their time with these clients. We provide the unique services required in the education sector as outlined in your RFP and have been doing so since the inception of our firm.