DRIVING MEASURABLE IMPACT

KAUFMAN | ROSSIN



2026 Annual Report



INDEPENDENCE DEFINES HOW KAUFMAN ROSSIN OPERATES

Shaping our perspective, strengthening our advice, and enabling long-term value for our clients.

This year represents a pivotal moment for the firm, defined by our independence, marked by leadership continuity and innovation, continued growth, and measurable impact across our clients, our people, and our communities.



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Kaufman Rossin | 2026 Annual Report

90%

of clients rate us 9 or 10 out of 10

More than double the industry average

2026

Best of Accounting™ Award

Earned based entirely on verified client feedback

$174M

in revenue

Reflecting continued growth and reinvestment in our people and capabilities

$1.3M+

in community support

Financial and in-kind contributions over the past year









We measure success by the impact we create for our clients, our people, and our communities.

A LEGACY OF LEADERSHIP

June 1, 2026, marked the official transition of Kaufman Rossin's leadership from **Blain Heckaman** to **Marc Feigelson**. This planned succession was a pivotal moment for the firm, representing continuity of proven leadership and the start of an exciting new chapter of growth.



BLAIN HECKAMAN AND MARC FEIGELSON

> **Marc Feigelson** brings nearly 30 years of experience to the CEO role.

A VISION FOR THE FUTURE

As Kaufman Rossin's chief financial officer for the past four years, he has driven operational excellence and sustainable growth across the firm. As a client services principal, he advises high-net-worth individuals, privately held businesses, and private equity firms. He has deep industry experience which includes real estate, healthcare, and professional services, with a focus on assurance, transaction advisory and complex financial matters.

Blain joined Kaufman Rossin in 1984 and led the firm from June 2012 to May 2026, succeeding founder Jim Kaufman. Under his leadership, Kaufman Rossin expanded its geographic reach and enhanced its advisory services, adding business consulting, risk advisory, forensic advisory, and specialty tax practices. He carried forward the founders' vision of a caring, people-first culture rooted in strong values and stewardship. That dedication led to many firm awards during his tenure, including multiple recognitions for client service and employee satisfaction.



FOUR PILLARS

Marc's vision centers around four core pillars, all with a focus on driving sustainable growth and client success.

1

Integrity

There's no right way to do the wrong thing. When the easy path and the right path diverge, we don't hesitate. We do what we say we're going to do and uphold the highest ethical standards in everything we do.

2

Collaboration

As One Firm, you only have to talk to one of us to access all of us. Bringing together diverse perspectives helps uncover blind spots, strengthen ideas, and deliver more complete solutions.

3

Joy

Joy isn't a luxury to enjoy once the hard work is done. It's working alongside people who celebrate your achievements, care about your success, and find purpose in helping clients solve real challenges.

4

Grit

We're here to stay. For more than 60 years, we've grown by doing things the right way—embracing challenges, finding creative solutions, and never taking shortcuts with our clients' futures.

STRATEGIC TRANSITION
FOR AN INDEPENDENT FUTURE



MARC FEIGELSON, CEO

As I step into the CEO role at Kaufman Rossin after nearly three decades with the firm, I've never been more excited for the future.

The firm is well positioned for continued success—powered by our people, enhanced by innovation, and rooted in our commitment to remaining independent. Our leadership transition represents continuity, reinforcing our long-term dedication to serving our people and our clients, not outside investors. Kaufman Rossin is the largest partner-owned CPA and advisory firm in Florida, and we intend to keep it that way.

Looking back over the past year, we have much to celebrate, from our top-tier client satisfaction ratings to repeat recognition as a Best Place to Work. These achievements reflect the dedication of our team and the trust our clients place in us. Our people-first culture, long-term client relationships, and independent structure have powered our success for more than 60 years.

My focus over the coming months and years is to build on the strong foundation that Blain and our management team have created, deepening our investments in technology and talent while keeping your needs at the forefront of everything that we do. We will continue to grow, innovate, and deliver the proactive guidance and trusted service you rely on, at every step of your journey.

We'll keep moving forward, shaping the next chapter of Kaufman Rossin together.

LEADING THE NEXT CHAPTER



MARC FEIGELSON, CPA
Chief Executive Officer

Our Executive Board brings together experienced leaders from across Kaufman Rossin to help shape the firm's strategic direction. Together, they advance our commitment to our people and clients and position the firm for continued growth while preserving the culture and independence that have defined us for more than 60 years.



IVAN A. GARCES, CPA

Chief Risk Officer,

Principal-Chair, Risk Advisory Services



RICHARD SALINAS, CPA

Chief Operations Officer



ADRIAN ALFONSO, CPA

Principal-Practice Leader, Tax



BAO NGUYEN, CAMS, CFE, CRCP

Principal-Investment Leader, Risk Advisory Services



KEITH S. SHARKEY, CPA

Principal, Financial Services

Managing Principal, Kaufman Rossin Alternative Investment Services



MEREDITH TUCKER, CPA

Principal-Practice Leader, Entrepreneurial Services

BUILT FOR LONG-TERM PARTNERSHIP & IMPACT

Kaufman Rossin is an independent CPA and advisory firm delivering integrated solutions across tax, audit, consulting, and risk. We partner with entrepreneurs, middle-market companies, and individuals to navigate complexity, manage risk, and plan for long-term success.

Our scale allows us to bring deep expertise and global perspective, while our structure keeps us agile, responsive, and focused on long-term client outcomes. As an independent firm, we prioritize sustained growth, reinvestment in our people, and relationships built to last.

With more than 700 professionals across offices in the United States, India, and Ivory Coast, we serve clients in more than 25 industries worldwide. Our client satisfaction—recognized year after year through the Best of Accounting award—reflects the strength of our relationships and the consistency of our service.

Integrated capabilities

- Assurance
- Banking & Capital Markets
- Business & Technology Consulting
- Forensic Advisory
- Fund Administration
- Investment Banking
- Outsourced Accounting
- Risk Advisory
- Tax Advisory & Consulting
- Wealth & Family Office

Core values

INTEGRITY
Do right. Always.

COLLABORATION
One conversation. Total access.

JOY
Purpose built into every day.

GRIT
Over 60 years of doing it right.

Industry recognition

AMERICA'S MOST RECOMMENDED TAX AND ACCOUNTING FIRMS (2026)
(USA Today & Statista)

BEST OF ACCOUNTING AWARD (2026)
90% client satisfaction

REGIONAL LEADER & TOP TAX FIRM (2026)
(Accounting Today)



Tiphanie Rood

Managing Director, Alternative Investment Services

SOME PATHS CIRCLE BACK

"Sometimes the best move forward is going back."

I grew up in Minnesota, where I learned early on what it meant to be independent, resilient, and resourceful—which is why, as a first-generation college student, I knew if I wanted to go to college, I'd have to figure it out myself. So I did. I applied to schools, took out loans, and after orientation, moved forward on my own without looking back.

At the time, I didn't have a clear plan. I chose Business Administration as my major, but it wasn't until my final year that everything clicked. I took my first accounting class, and while it wasn't for everyone, I loved it. That's when I found my direction.

In 2010, my boyfriend (now my husband) and I packed up and drove to Florida so I could pursue my master's degree and he could pursue his law degree, both at Nova Southeastern University. Somewhere near Atlanta, the air conditioning in my 1998 Chevy Cavalier gave out for good. I couldn't afford to fix it, so for the next year, I drove through the South Florida heat without AC, often changing clothes in restroom stalls before heading into work.

I worked full-time in a career development office during the day, then alternated between working at a CPA firm and taking classes in the evenings, while also staying active on campus. I looked for every opportunity to learn—taking QuickBooks courses at a local high school, volunteering with the Internal Revenue Service, and gaining as much hands-on experience as I could.

That drive led me to Kaufman Rossin in 2012. Several years later, I left for a leadership opportunity at a smaller firm. During the pandemic, I found myself reflecting on what mattered most to me: collaboration, shared expertise, and being part of a strong, connected team. In 2021, I made the decision to return to KR.

Since returning, I've had the opportunity to build and lead a diverse team across the U.S. and India, support major private equity real estate clients, and continue growing in my role. I'm especially passionate about mentoring others and helping them find their own path forward.

Looking back, figuring things out on my own early on—pushing through challenges and taking chances—shaped who I am in ways I couldn't have anticipated at the time. And I'm excited to keep building what comes next at KR.

STABLE BY DESIGN
GROWING BY CHOICE

A committed, proven partner, measured and trusted.



Financial

Scale that supports **independence & reinvestment**

$174M net revenue for the fiscal year ended May 31, 2026

In the **Top 50** on the 2025 IPA Top 100 Firms list



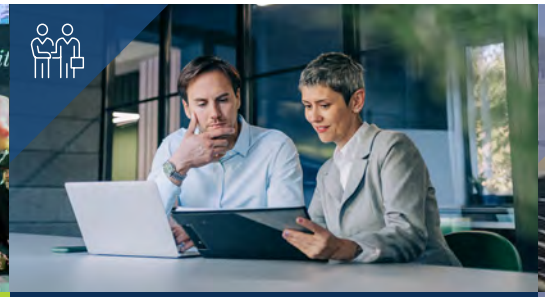
People

700+ professionals across 8 offices

Serving clients across more than **25** industries

Ranked **#1** among accounting firms & **#3** among large companies in the 2026 South Florida Business Journal's Best Places to Work survey

A culture built on professional development, joy in the work, and long-term relationships



Clients

90% of surveyed clients rated our service **9–10 out of 10** Industry average for the same survey is 48%

Nationally recognized with the **Best of Accounting Client Satisfaction award**

Integrated services spanning accounting, audit, tax, consulting, risk, and forensic advisory



Community

$1.3M+ in financial and in-kind support donated last year

100+ organizations supported through volunteer time and resources

Professionals actively engaged in civic leadership, board service, and partnerships advancing health, education, and professional development

A JOURNEY SHAPED BY INSTINCT

> If I could go back, I'd tell my younger self one thing: trust your instincts and keep going.



Raymond Villanueva, CAMS
Principal, Risk Advisory Services

I grew up in Puerto Rico, in a hardworking, blue-collar family. The lesson was simple: if you want something, you work for it. When I came to the United States, I didn't speak a word of English. I enrolled in the Army and went through an ESL program. That experience opened doors I couldn't have imagined.

When I returned home, I joined the Puerto Rico Police Department, working, studying accounting, figuring things out as I went. My path wasn't planned; it evolved.

A chance encounter during my morning commute led me to a federal agent who became a mentor, and eventually to a career with the U.S. Customs Service, first as a task force officer, then as a federal agent.

After more than 30 years in law enforcement, I thought I knew what my next chapter looked like. Then a conversation with someone I trusted changed everything. That moment led me to Kaufman Rossin and the opportunity to build something new.

From the start, it felt right. The chance to create an investigations practice, work alongside people I respected, and keep doing the work I care about. It all aligned.

Today, I lead investigations within Risk Advisory Services, supporting clients through some of their most complex challenges. When organizations face regulatory scrutiny or complex remediation challenges, we step in to bring clarity, structure, and a path forward. Walking into a situation where everything feels uncertain and helping bring order to it—that's the most rewarding part of this work.

What stands out most is the culture. People here show up. We stay engaged, work side by side with clients and each other, and see things through. It's built on trust, accountability, and doing things the right way.

My path was anything but conventional. But every step built toward something. If I could go back, I'd tell my younger self one thing: trust your instincts and keep going.

INVESTING IN STRONGER COMMUNITIES

With more than $1.3M in financial and in-kind support contributed this past year, community involvement is a core part of how Kaufman Rossin operates, not a separate initiative. Rooted in our people-first culture, our approach to community engagement reflects a long-standing commitment to making a difference where we live and work.

Our professionals actively support more than 100 charitable organizations across the regions we serve, contributing time, expertise, and financial resources. Through board service, volunteerism, and firm-led initiatives, our teams build lasting partnerships that strengthen local communities and expand access to opportunity.

Firm-wide engagement in community leadership and volunteerism

Professionals actively serve through board roles, volunteering, and firm-led initiatives.



$1.3M+
in financial and in-kind community support over the past year

190+
professionals creating impact
Contributing their time, expertise, and leadership to local initiatives

100+
organizations supported
Active partnerships across the communities we serve

FOCUSED AREAS OF IMPACT

We focus our efforts across four key areas to drive sustained impact:

Health & well-being

Supporting organizations that provide essential services, promote well-being, and strengthen families

Business & professional leadership

Advancing local economies and elevating professional standards through active leadership and engagement

Community development

Enhancing quality of life through housing, neighborhood development, and access to critical resources

Mentorship & youth development

Expanding opportunities through mentorship, education, and youth enrichment programs













PARTNERSHIPS THAT DRIVE CHANGE

We collaborate with organizations that share our commitment to building stronger, more resilient communities. Many of these partnerships are sustained through long-term involvement and leadership by our professionals.

Through these partnerships, we extend our impact beyond financial contributions—supporting initiatives that create lasting, measurable impact.

Key partners include:

- The Women's Fund Miami-Dade
- Breakthrough Miami
- United Way
- WLRN Miami | South Florida
- Arts&Business Council of Miami
- YWCA South Florida
- JA Worldwide
- Goodwill Industries of Southwest Florida, Inc.
- Orange Bowl
- Big Brothers Big Sisters of America
- Cristo Rey Network
- Trustbridge
- Families First of Palm Beach County

Learn more at kaufmanrossin.com

WHERE TECHNOLOGY MEETS POSSIBILITY

> "I've always been drawn to numbers, even before I knew exactly what I wanted to do with them."



Lilia Restrepo
Director, Business Intelligence

Growing up in Mexico, I considered a few different paths, but when the opportunity came to study accounting, I took it and committed to making the most of it. It gave me a strong foundation and opened the door to my first role at Televisa, where I started in audit before moving into accounting for pay-per-view channel production.

My career progressed quickly. Early on, I was leading a team and taking on increasing responsibility, but I also realized I wanted to explore something beyond traditional accounting.

That opportunity came through a move into marketing. Even in that role, I naturally gravitated toward data—building models and finding better ways to understand performance. The work was fast-paced and creative, and it gave me the chance to travel, produce events and be part of large-scale campaigns.

For a while, I thought that was the direction my career would continue. Then I had the opportunity to come to the United States.

Making that decision meant starting over. I left behind a role I had grown into and came to Miami to build something new. In those early days, I focused on adapting, improving my English and working wherever I could—taking on different roles to make ends meet, even when they didn't align with my previous experience.

Over time, I found my way back into a familiar industry, joining Univision. While I was there, I made another shift (this time intentionally) and pursued a master's degree in data science from St. Thomas University. That decision helped bring together what had been a consistent thread throughout my career: working with data, using technology and solving problems.

It's what ultimately led me to Kaufman Rossin.

Today, I lead a team focused on helping people make better decisions through data. I've always seen my role as understanding what people need and finding better ways to work—and over time, that's evolved from static reporting into interactive tools and AI-powered solutions. What excites me most right now is AI, and the opportunity to help people navigate that shift in a way that feels practical and approachable.

Looking back, I wouldn't change my path. Every step built toward something, even when it didn't feel that way at the time.

SHAPING THE FUTURE OF OUR PROFESSION

Kaufman Rossin contributes to the accounting and advisory profession not only through client work, but by shaping industry dialogue, sharing expertise, and engaging in professional leadership. Our people bring real-world insight, helping businesses, peers, and communities navigate a rapidly evolving landscape.

40+
campus recruiting events

Active engagement with students through career fairs, networking opportunities, and university partnerships.



Leading the conversation

Our professionals publish insights on key topics including succession planning, mergers and acquisitions, tax policy, and risk management. Through articles, interviews, and industry commentary, we translate complex change into practical guidance for business leaders.

Over the past year, our leaders have contributed to national conversations through media features and firm-authored content, reinforcing our role as a trusted voice on emerging trends and critical business decisions.



Setting the standard

Our professionals bring more than expertise—they bring leadership. From conference stages and panel discussions to board seats and civic organizations, our people show up where it matters: shaping policy, setting standards, and addressing the real-time challenges facing businesses today.

This active presence across industry and professional communities does more than extend our reach. It deepens our perspective, keeps us closely connected to evolving needs, and ensures that what we learn out in the world comes back to the clients we serve.

COMMITTED TO THE PROFESSION WE SERVE

Leadership within the FICPA

Kaufman Rossin professionals have served at every level of the Florida Institute of CPAs—from the Board of Trustees and Scholarship Foundation to chapter leadership and, today, the FICPA Board of Directors. This commitment reflects our belief that strengthening the profession is as important as serving our clients.

Global collaboration through Praxity

As a member of Praxity, the world's largest alliance of independent accounting firms, Kaufman Rossin combines the advantages of independence with access to global expertise.

Through this collaboration, we:

- Share knowledge across international markets
- Support clients with cross-border needs
- Stay connected to global trends and regulatory developments

These contributions extend our impact beyond client engagements, helping shape the future of the profession while staying closely connected to the evolving needs of the market.



Yosel Martinez

Manager, Integration & Transformation, Business Consulting Services

PURPOSE ALWAYS COMES FIRST

"I've always prioritized my family."

I started my career in healthcare administration, first at Mount Sinai Medical Center, then at Compass Healthcare, where I eventually led a regional team of more than 30 people supporting some of the largest healthcare systems in the Southeast. The work was rewarding, but demanding. I was on the road constantly, and when COVID hit, the intensity increased.

At the same time, my life at home was changing. I had a young family, and I started asking myself where I wanted to go professionally and how I wanted to show up personally. I've always prioritized my family, and that's never been something I've been willing to compromise.

That's what led me to Kaufman Rossin.

The opportunity came through someone I trusted, and the more I learned about Kaufman Rossin, the more it felt right. The consulting environment was new, but the foundation was familiar—working with people, solving complex problems, helping organizations move forward.

Today, as a manager on the Integration & Transformation team, no two projects look the same. I focus on large-scale initiatives, helping organizations navigate change across operations, systems, and strategy.

Early on, I had the chance to work with organizations like The Children's Trust and the Early Learning Coalition on initiatives focused on children and education. For someone who puts family first, that work felt personal. It reinforced that I had landed somewhere whose values aligned with my own.

More recently, I've led complex integrations for global companies navigating real instability. What I enjoy most is stepping into uncertainty and figuring it out, alongside a team that's just as invested as I am.

That collaboration is what I value most. You're never working in a silo here. Along the way, I've completed my MBA, built new skills, and worked alongside leaders who are genuinely invested in my growth. That support has made a real difference.

Looking back, most of my decisions come down to one principle: don't shy away from challenges, even when you're not sure you're ready. You figure it out—and you don't have to do it alone.

CULTURE THAT POWERS PERFORMANCE

Our people are the foundation of Kaufman Rossin's success.

A strong, inclusive culture enables our professionals to collaborate effectively, think differently, and deliver consistent, high-quality outcomes for clients.

We invest in our people through continuous learning, leadership development, and a workplace environment designed to support both professional growth and personal well-being. This commitment strengthens our ability to attract and retain top talent across the firm.



Culture of belonging

At Kaufman Rossin, we believe that when people feel seen, heard, and valued, they do their best work. Our community employee resource groups reflect that belief, spaces built around shared interests, experiences, and curiosity, where colleagues connect, learn from one another, and celebrate what makes each of us who we are.

Through these connections and firm-wide programs, we continue to build a workplace where different perspectives are welcomed, collaboration runs across every team, and a sense of belonging is something we all help create.

Employee Resource Groups

Our employee-led groups create space for shared experiences, mentorship, and connection—strengthening collaboration and professional development across the firm. Every professional at the firm is welcome in any group, whether it connects to who they are, where they come from, what they care about, or simply a curiosity about the conversations within it. Groups are organized around shared themes, and membership is open to all. Where a group doesn't yet exist, any member of the firm is welcome to start one.

KREW (Kaufman Rossin Empowering Women)

Supports women at all stages of their careers by fostering connection, professional growth, and engagement across the firm.

REACH (Remote Engagements and Collaborations Hub)

Builds connection, collaboration, and engagement for remote and hybrid professionals.

BOLD (Black Opportunities for Leadership & Development)

Strengthens cultural awareness across the firm by creating opportunities to connect, share experiences, and learn from one another.

KRAVE (Kaufman Rossin Asian Voices & Engagement)

Creates space to connect, learn, and engage around Asian cultures, perspectives, and shared experiences.

Thrive

Creates space for education, conversation, and connection around mindfulness, mental wellness, and personal well-being.

Prism

Fosters a welcoming environment for LGBTQ+ professionals and their colleagues at Kaufman Rossin.

KRISP (Kaufman Rossin India Support & Partnership)

Builds connection and community for Kaufman Rossin's India team while strengthening collaboration across the firm.

FROM BALLET DISCIPLINE TO LIFESTYLE LEADERSHIP

"My path to accounting wasn't traditional."



Jennifer Quent
Director, Family Office & Lifestyle Services

I spent years dancing professionally with American Ballet Theatre, training from the age of four and performing around the world. Ballet is demanding in ways that are hard to fully explain from the outside. The precision required, the discipline, the ability to read the room and adjust in real time. You are constantly problem-solving, usually invisibly, so that what the audience sees looks effortless.

When I transitioned into accounting, people sometimes assumed I was starting over. I never felt that way. The environment changed, but the mindset came with me. I was still drawn to detail, to structure, to the kind of behind-the-scenes coordination that makes everything come together without anyone noticing how much work went into it.

I'm now a Director of Family Office and Lifestyle Services at Kaufman Rossin, working closely with families navigating increasingly complex personal and financial demands. The work varies enormously. That's part of what keeps it interesting. Families trust us with things that don't fit neatly into a spreadsheet, and a lot of what I do is simply being a steady presence when things feel uncertain or complicated.

One situation that stays with me: I was asked to help sell a 450-acre off-the-grid property in New Hampshire—an estate with a number of sensitive assets that needed to be managed carefully. It wasn't a typical transaction, and the family needed it handled quickly and discreetly, with as little burden on them as possible.

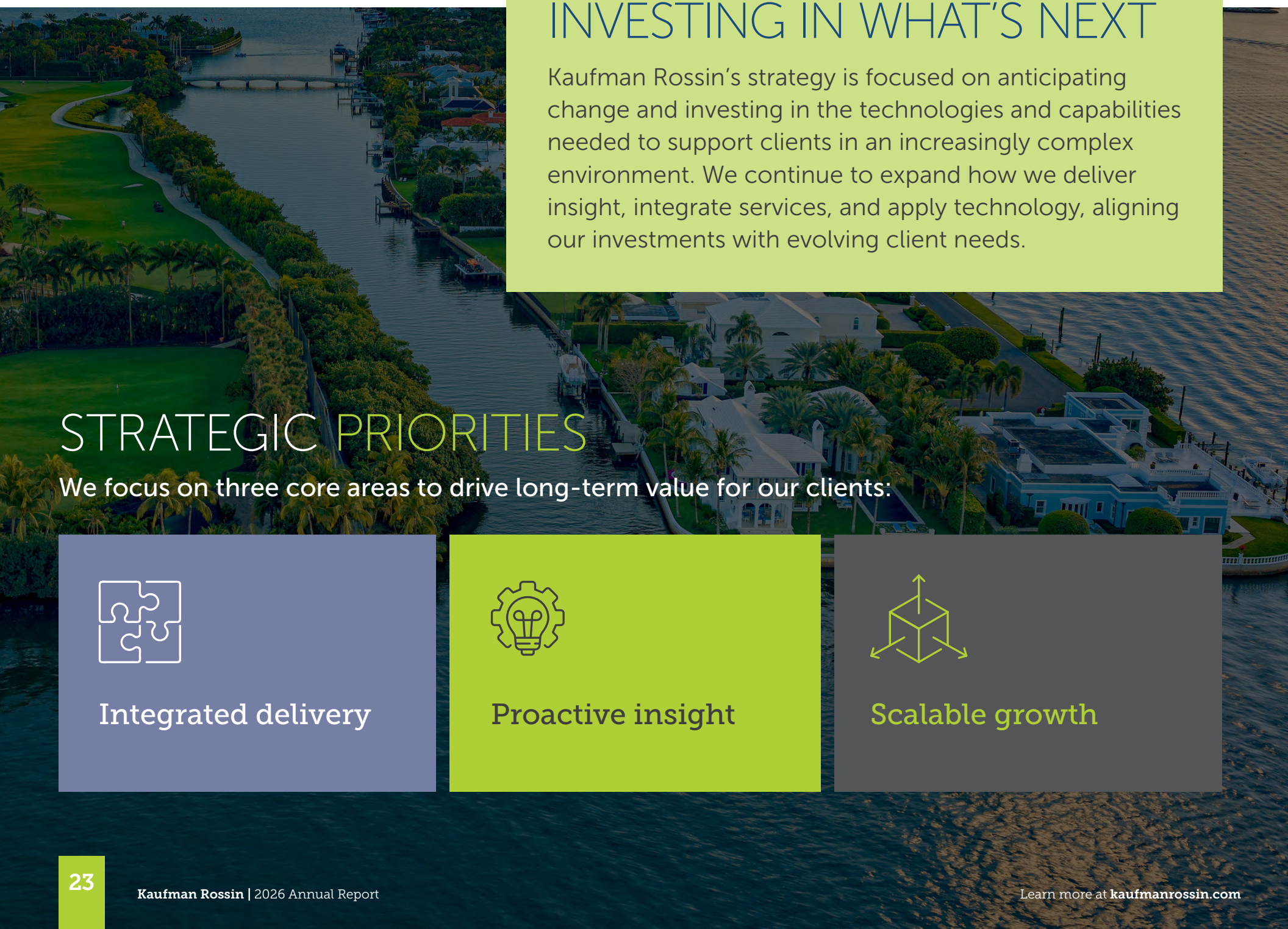
I helped pull together the right people, a local real estate expert who knew how to position the property, along with legal and insurance professionals, and worked to keep everyone aligned through the process. Within three weeks, the property sold above asking, through a competitive bidding process. But what mattered most wasn't the outcome on paper. It was that the family could step back and trust that the details were covered.

That's the part of this work I care most about. Not the complexity itself, but helping people navigate it without having to carry all of it alone.

In that sense, it's not so different from where I started. It's still about preparation. Still about precision. Still about making something difficult look, from the outside, like it was never that hard at all. The audience never sees the rehearsal. They only see the performance.

INVESTING IN WHAT'S NEXT

Kaufman Rossin's strategy is focused on anticipating change and investing in the technologies and capabilities needed to support clients in an increasingly complex environment. We continue to expand how we deliver insight, integrate services, and apply technology, aligning our investments with evolving client needs.



STRATEGIC PRIORITIES

We focus on three core areas to drive long-term value for our clients:

Integrated delivery

Proactive insight

Scalable growth

ARTIFICIAL INTELLIGENCE ON OUR TERMS

We take a deliberate approach to AI, evaluating every tool against one standard: does it make our people better at serving our clients?

As an independent, partner-owned firm, we aren't optimizing for an investor's timeline—we adopt technology at the pace that's right for our people and our clients, never the reverse.

We leverage AI and other technology in combination with human expertise to provide proactive, strategic solutions. Our Digital Transformation services help clients modernize operations, improve data visibility, and adopt technologies that enable more informed, real-time decision-making and scalable growth.

Digital access:	Client portals provide real-time visibility into financial data and reporting.
Cybersecurity & risk management:	Advanced tools and solutions—such as our Synack partnership for penetration testing as a service (PTaaS)—help protect sensitive information and address evolving threats.
Process optimization:	AI and automation streamline workflows, improve accuracy, and free our teams for higher-value advisory work—supported by a firm-wide AI enablement journey that builds structured, tailored AI fluency.

EXPANDING CAPABILITIES TO SUPPORT GROWTH

We continue to invest in talent, expand our service capabilities, and deepen industry specialization to meet evolving client needs.



KAUFMAN ROSSIN | PE

Kaufman Rossin Private Equity marks a new chapter in our private equity practice—a dedicated destination for fund partners, deal teams, operating partners, and portfolio company leaders seeking hands-on advisory across the full deal lifecycle, from diligence through exit.

Continued investment in transaction advisory, tax, fund administration, and digital transformation reflects our focus on delivering both depth and integration to the private equity market.

MARY | STREET capital

The launch of **Mary Street Capital** enhances our ability to help our clients with transactions, capital strategy, and long-term financial planning, further extending our integrated model across the full business lifecycle.

With expertise across the middle market, we deliver customized investment banking services for entrepreneurs, focused on more than just the deal.

LAYING THE FOUNDATION FOR GROWTH

> "I was looking for something more grounded. More collaborative."



Ryan Loughry

Business Consulting Services
& Mary Street Capital Analyst

I attended West Virginia University, earning both my MBA and a degree in finance. While I was there, an internship at a venture capital firm introduced me to the fast-paced world of finance, and I knew that's where I wanted to be.

After graduating, I moved to Florida and started at an investment bank. It was a valuable experience, but this specific environment felt more like an "every man for themselves" scenario, rather than a place where people were working together. It gave me a clear sense of what I didn't want long term. I was looking for something more grounded. More collaborative.

That's what led me to Kaufman Rossin.

From my first conversations with the team, something felt different. The culture was approachable, supportive, and genuinely welcoming. I remember hearing during the interview process that "this wasn't the kind of place where people raise their voices," and for whatever reason, that stuck with me. When I received the offer, I didn't hesitate; I said yes right away.

Since joining the firm, I've had the opportunity to work across transaction advisory and M&A consulting, while also supporting the buildout of Mary Street Capital, our investment banking arm. Being part of that from the ground floor has been one of the most rewarding parts of my experience so far.

I always try to stay curious and raise my hand. Here, that mindset goes a long way. If you're willing to step in and learn, people give you the opportunity to do just that.

What stands out most, though, is the environment. People here care about their work and about each other. It's a place where you can grow, take on new challenges, and feel supported along the way.

For me, this has been about more than just building a career. It's been about finding the right network of caring and sharp professionals and continuing to build and learn from there.

PURPOSE
BEYOND THE PROFESSION

FAMILY FIRST OF PALM BEACH COUNTY: Building Stronger Communities



Bao Nguyen, CAMS, CFE, CRCP
Principal - Investment Leader, Risk Advisory Services

When I decided to get involved in the community, I wanted to invest my time where I live and work. That led me to Family First of Palm Beach County, a nonprofit dedicated to strengthening families through programs that support parents, children and caregivers facing difficult circumstances. I've served on the foundation board for more than 11 years, helping connect business and community leaders to the organization's mission.

The most meaningful moments come from hearing directly from families whose lives have been changed by Family First's work. Those stories remind me that it's not just about how much time you give—it's about helping strengthen families, because stronger families create stronger communities. Every family's story is a reminder that even small contributions can make a lasting difference.

TRUSTBRIDGE: Caring Beyond Hospice



Meredith Tucker, CPA
Principal-Practice Leader, Entrepreneurial Services

I first became involved with community organizations because I wanted to use the skills I had to make a difference. That journey eventually led me to Trustbridge, a nonprofit that supports hospice care. My involvement has grown over the years, and serving alongside the organization has changed the way I think about hospice and compassionate care.

Many people think of hospice as only end-of-life care, but I've learned it's so much more. Trustbridge talks about 'full life care'—supporting not only patients, but their families as well. Seeing the compassion these caregivers bring has made a lasting impression on me. It's shown me what compassionate care truly looks like and reinforced how meaningful it is to support our neighbors when they need it most.

ORANGE BOWL & UNITED WAY MIAMI: Expanding Impact



Frank Gonzalez, CPA, CFF
Principal, Assurance & Advisory Services

Giving back has been a constant throughout my career, leading me to the Orange Bowl Committee and United Way Miami. I've been involved with the Orange Bowl Committee for the past 17 years, serving on its board and as chair, and with United Way Miami for more than 30 years, where I'm completing my term as president and chair of the board.

The Orange Bowl's impact extends far beyond football through youth sports, scholarships, health initiatives and community events. As a Cuban-American, I was especially proud to help broaden the organization's reach within Miami's Hispanic community. United Way gave me a firsthand look at how thoughtful stewardship ensures resources reach the people who need them most. Helping others understand that impact has been one of the most rewarding parts of my journey.

LOOKING AHEAD

As Kaufman Rossin embraces its next chapter, we do so from a position of strength—guided by a seamless leadership transition, a clear strategic direction, and a continued commitment to our clients, our people, and our communities.

KAUFMAN | ROSSIN

Our independence remains a defining advantage, enabling us to adapt, innovate, and invest in the capabilities that matter most.

We have only one agenda: yours. Our focus is delivering insight, stability, and long-term value for those we serve.

We look ahead with the belief that remaining independent and building on the foundation we've established will allow our clients and our people to grow, evolve, and lead in the years to come.

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Learn more at **kaufmanrossin.com**
3310 Mary Street • Suite 501 • Miami FL 33133
305.858.5600

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