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CBIZ – Success in Action

June 2, 2025



Friedman to Marcum to CBIZ – The Journey of a Tax Specialty Practice

- Meet the speakers
 - Ryan Dudley, CPA CA, CTA, International Tax Managing Director
 - Farnaz Amini, PhD, Transfer Pricing Director
- Our Story
 - International Tax
 - Transfer Pricing

Ryan Dudley

CPA, CA, CTA, Managing Director
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Ryan Dudley, a managing director in the CBIZ International Tax group, specializes in developing cross-border commercial structures and financing strategies to optimize international operations and transactions. With over 25 years of public accounting and investment advisory experience, Ryan's clients have ranged from Fortune 50 multinational corporations to private equity and hedge funds, small businesses, and start-ups. He has advised clients in industries as diverse as banking and finance, technology, real estate, infrastructure, manufacturing, and pharmaceuticals.



Farnaz A. Newell

PhD, Director

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Dr. Farnaz Newell, a transfer pricing director in CBIZ's National Tax Office, specializes in related party transactions. She has 16 years of experience in practicing economics and transfer pricing. Farnaz is an expert in transfer pricing, bringing extensive experience in developing both internal and external business strategies. She possesses deep knowledge in the application of IRC Section 482 regulations and the 2022 OECD Guidelines, ensuring comprehensive global transfer pricing compliance and consultancy. Her expertise spans tax planning and transaction structuring, technical benchmarking, pricing models, intangible asset valuations, advanced pricing agreements, cost allocations, and financial and economic modeling.



Challenges to Growing an Advisory Practice within the Professional Services Industry

- Some significant challenges to growing in the professional services industry include:
 - Talent acquisition and retention
 - Difficulty in finding skilled professionals
 - Regulatory compliance
 - Keeping pace with evolving tax laws and financial regulations
 - Technology integration
 - Balancing automation with high quality service delivery
 - Client expectations and competition
 - Rising demand for personalized services in a crowded market.

Benefits of scale and reaching critical mass!

Milestones

- Success is defined by milestones, which may include
 - Revenue thresholds
 - More complex projects
 - More visible projects
- Through our journey we achieved our milestones by:
 - Building client trust and brand recognition → Client Loyalty
 - Enhancing client relationship with tailored solutions
 - Gaining access to greater scale of resources related personnel as well as technology
 - Greater collaboration with internal and external practitioners to expand tailored solutions to our clients
- Most importantly, the advisory business is not merely an enhancement to the compliance business but a successful stand-alone business.

CBIZ Specialty Consulting Practices Can Help Smaller Firms and Solo Practitioners Achieve Greater Success

- During our journey from a small to a large practice, we have learned that adaptability is a key to overcoming challenges and hitting milestones.
- We made use of all internal and external resources available to us to provide our clients a comprehensive suite of services.
- As a large specialty practice now, we can provide you with the technical know-how, experience and resources to:
 - Provide a broader suite of services to your clients
 - Develop your brand as a trusted advisor, which is a result of greater trust and client loyalty.



Thank You

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Farnaz Newell – farnaz.newell@cbiz.com



About CBIZ...

[CBIZ.COM](https://www.cbiz.com)

CBIZ is a consulting, tax and financial services provider that works closely with CBIZ CPAs P.C., an independent CPA firm that provides audit, review and other attest services.

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CBIZ – Who We Are

CBIZ, Inc. (NYSE:CBZ) is a publicly traded, leading professional services advisor to middle market businesses and organizations nationwide. With unmatched industry knowledge and expertise in accounting, tax, advisory, benefits, insurance and technology, CBIZ delivers forward-thinking insights and actionable solutions to help you anticipate next steps and accelerate growth.

We help your organization *navigate challenges*, turn *risk into opportunity* and drive sustainable, *long-term excellence* — where you are today and wherever you want to grow. Our 10,000+ team members across 160+ locations in 22 major markets provide top-tier industry expertise with local delivery, relationships and support.

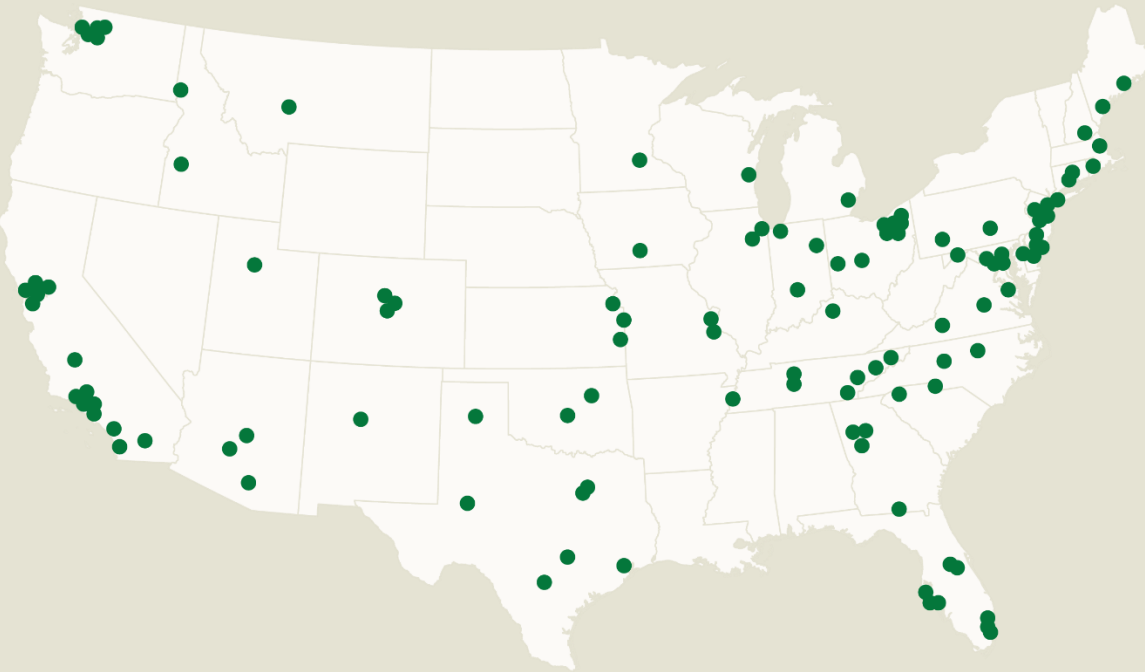
A TOP 7
Largest Accounting
Provider Nationally¹

A TOP 30
Largest Broker
of U.S. Business²

¹ Accounting Today 2025 Top 100 Firms Report

² Business Insurance magazine – July 2024

CBIZ by the Numbers



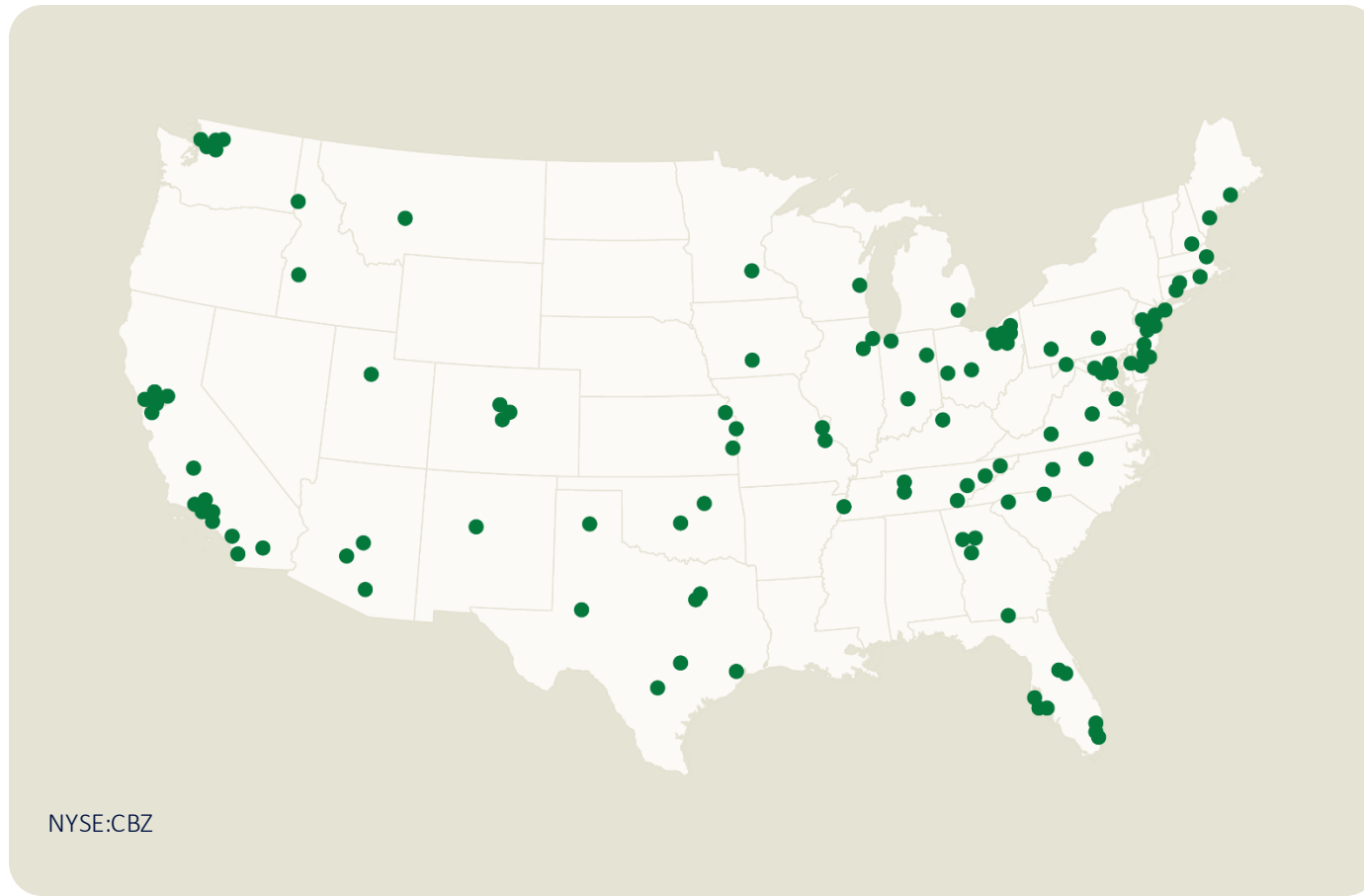
NYSE:CBZ

160+
offices

10K+
team members

135K+
clients

CBIZ by the Numbers



\$2.8B
in revenue

160+
offices

10K+
team members

22
major markets

135K+
clients

CBIZ Services

Accounting

- International Capabilities
- Audit, Review & Other Attest Services*
- Outsourced Accounting
- Transaction Services



Tax

- Tax Compliance
- Tax Consulting
- Tax Controversy
- Private Client Services
- International Tax
- State & Local Tax



Advisory

- Transaction Advisory Services
- Risk Advisory Services
- Forensic Consulting & Litigation Advisory
- Financial Accounting & Advisory
- Valuation
- Human Capital Management



Benefits

- Benefits Consulting
- Total Rewards Data Analytics
- Employee Experience Consulting
- Retirement Plan Consulting
- Actuarial Services
- Benefits Administration



Insurance

- Property & Casualty
- Risk Management Services
- Alternative Risk Solutions
- Program & Specialty Insurance
- Individual Insurance



Technology

- Cloud & Infrastructure Solutions
- Managed IT Services
- Cybersecurity, GRC & DFIR Services
- Enterprise Performance & Technology
- Strategic IT Consulting
- Emerging Technology



CBIZ CPAs Overview

CBIZ CPAs P.C. (CBIZ CPAs) is a **top national accounting firm** that serves growth-oriented companies across the industry spectrum and not-for-profit organizations. In 1998, CBIZ CPAs sold its tax and consulting practices to CBIZ and now focuses on providing attest-related services. CBIZ CPAs operates under an alternative practice structure with CBIZ in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards.

CBIZ CPAs stats:

- 468 combined shareholders
- Advanced use of technology
- Together, CBIZ and CBIZ CPAs will be top 7 accounting provider*
- Headquartered in NY, NY
- Led by President, Andrew Gragnani

Industry Expertise

- Consumer & Industrial Products (including Manufacturing)
- Professional Services
- Tech & Life Sciences
- Real Estate
- Capital Markets
- Financial Services
- Nonprofit, Social Services & Higher Education
- Private Equity
- Healthcare
- Construction
- Food & Beverage
- Alternative Investments
- Arts & Entertainment
- Government
- Energy
- Cannabis
- Digital Assets



Our Values

Mission Statement

To provide exceptional advice and solutions that help our clients achieve their goals.

Vision Statement

To be recognized by our clients as the premier provider of accounting, insurance and other professional business services and by our team members as their employer of choice.



We do the right thing.



Our people matter.



We are dedicated to the success of our clients.



We expect to win.



We are OneCBIZ.