

## PROFILE 2020 ACCOUNTING

## RKL LLP

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Everything we do at RKL — whether it's interpreting tax regulations, crafting an investment portfolio or installing a new ERP system — is designed to help clients achieve their next-level goals. As a leader in professional services, RKL boasts expertise in a broad range of financially oriented disciplines, including audit and accounting, tax planning and compliance, data analytics, performance improvement, wealth management and information technology.

The RKL team takes stock of clients' unique circumstances and objectives, and collaborates across disciplines to develop solutions for their challenges associated with

people, processes, growth, change and technology.

This focus on getting clients future-ready fuels RKL's climb among the nation's top firms, as ranked by industry publications Accounting Today and INSIDE Public Accounting. It also requires specialized expertise and problem-solving instincts. From soft skills development to specialized advisory credentials, RKL takes a customized approach to helping each team member realize their full potential and pursue their professional passions. Robust learning and development options are a big part of what makes RKL one of the "Best Places to Work in PA" for three years

running.

As this innovation continues to earn the firm growth and accolades, RKL will never lose sight of what really matters: trusted relationships with clients, colleagues and the Berks County community where the firm got its start. Called by the RKL mission to give back, team members find creative and collective ways to express gratitude and pride in the places they call home. In 2019 alone, RKL's more than 500 professionals served on 230 boards and committees and spent more than 9,500 hours volunteering with local organizations. To learn more, visit [www.rklcpa.com](http://www.rklcpa.com).

## ACCOUNTING

## William G. Koch &amp; Associates

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Who finds accounting and tax work exciting? We do! Why?

- It is not because we are highly knowledgeable numbers people — even though we are.

- It is not because we have more than three decades of experience as a locally owned and managed CPA firm with clients in 30 states — even though we do.

- And it is not because we provide an array of services such as tax planning and preparation, audits, estate and trust accounting, and bookkeeping — even

though we do.

It is because we are a team of caring accounting experts who thrive on building relationships with our individual, not-for-profit, small and midsize business clients. You are never just a number to us.

We strive to make all things accounting-related easier for you, from minimizing tax liability to maximizing tax and business strategies, helping you grow your organization or plan for personal financial prosperity.

We truly are a full-

service CPA firm led by Bill Koch Sr. and Bill Koch Jr. We have a staff of 15 employees, including CPAs, plus an enrolled agent who can represent clients before the IRS, an attorney with a master's degree in taxation and a QuickBooks™ Pro advisor.

We are dedicated to serving our existing clients and would be excited to welcome you to our firm. Please call to set up an appointment with one of our professionals or log onto [www.wgkcpa.com](http://www.wgkcpa.com) to contact us.



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## Herbein + Company Inc.

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610-378-1175 WWW.HERBEIN.COM

Herbein + Company Inc. (Herbein) is a leading regional certified public accounting firm whose professionals specialize in creating impact for clients, as we help them build a brighter tomorrow. Our 225+ team members serve clients from our Spring Township headquarters and seven other offices in Pennsylvania and New Jersey.

We're committed to anticipating and adapting to innovation, market trends and evolving legislation by investing our time and resources into fully understanding the key industry segments our clients operate in. Herbein professionals provide accounting, auditing, and tax services for privately held and family businesses, tax-

exempt organizations and individuals.

Our firm's advisory services include business valuations, mergers and acquisitions due diligence, risk management, tax saving studies, financial planning, forensic accounting, bankruptcy, litigation support, field exams and benchmarking. Internal audit, risk management and compliance services for banks and financial institutions are provided through our Financial Outsourcing Solutions (FOS) division.

For almost 50 years, Herbein's partner-led engagements have centered on a collaborative, cost-effective approach to doing business and personalized strategies to

help organizations succeed. Our firm is an independent member of Allinial Global, an accounting firm association of legally independent accounting and consulting firms with offices in North America and throughout the world. Closer to home, we give back to the communities where we live and work through volunteerism and financial support.

Herbein continues to seek and build competitive advantage for our people and our clients by focusing on three areas: investing in our people, enhancing the Herbein experience, and innovating in our business offerings. Visit [www.herbein.com](http://www.herbein.com) or connect with us on LinkedIn, Facebook, Instagram and Twitter.

## ACCOUNTING

## Pancerella &amp; Associates LLC

301 W. LANCASTER AVE., SHILLINGTON, PA 19607  
610-796-1066 WWW.PANCERELLACPA.COM

Pancerella & Associates LLC has cultivated a reputation for professionalism, ethics, independence and integrity in providing accounting and financial services to a select group of small- to middle-market businesses and individuals.

Founded by Joseph A. Pancerella, CPA/PFS, CFP, we strive to be much more than the average accounting firm. We offer a range of accounting, tax and consulting services combined with local presence and personal attention. Our experienced professionals are there for you every step of the way: easy to reach and on hand to help you navigate the ever-chang-

ing marketplace, financial and regulatory landscape. We build strong relationships of trust with our clients and, in doing so, maintain friendships that last a lifetime.

Joseph A. Pancerella, CPA/PFS, CFP, is the managing director of the firm. Prior to starting his own practice, Pancerella spent several years involved in regional and local public accounting. His experience includes high net-worth individuals and business clients in real estate, manufacturing, construction and retail.

His specialties include corporate and individual taxation, investment advi-

sory and counseling, and business acquisitions and sales. Starting his own practice in 1997, he formed what is now Pancerella & Associates LLC in 2004.

Pancerella & Associates has been a member of the Berks County business community for more than a decade. In 2010, we decided our success was defined by how we help clients further their business and achieve personal financial goals. With that in mind, we added a location at 300 N. Pottstown Pike, Suite 230, in Exton, Chester County. This location is ideally positioned for clients who live and work in the tri-state area.

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The appropriateness of a particular investment or strategy will depend on an investor's individual circumstances and objectives.

Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors do not provide tax or legal advice. Clients should consult their tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning and other legal matters.

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### Connors Investor Services Inc.

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We offer investment management customized to meet individual and institutional clients' specific investment goals, including retirement planning, risk tolerance and tax considerations. Investment strategies offered include a variety of equity and fixed-income approaches. Small-cap stocks and hedging techniques, which include covered call writing on individual stocks and indices, are two areas of particular expertise. We work collaboratively with your tax and estate planning professionals, taking into consideration these aspects as we manage

your investments.

Founded in 1969 as an equity research firm, the company progressed to investment management in 1974. Connors Investor Services conducts proprietary research, portfolio management and client advisory services nationwide. The firm enjoys substantial depth of personnel at both the management and support staff levels. Professional designations held by the team include five chartered financial analysts (CFA®), two certified financial planners (CFP®) and a certified trust and financial adviser (CTFA). We provide

a high level of client service and a disciplined approach to managing investments and preserving wealth. Our management team averages 31 years' investment experience and 14 years with the firm. As financial markets have evolved, we have continued to provide creative investment solutions by combining new approaches with proven fundamentals. We celebrate our milestone 50th year by continuing to provide personalized service and customized asset management to our valued clients.

## INVESTMENTS

### Domani Wealth

2755 CENTURY BLVD., SUITE 200, WYOMISSING, PA 19610  
 610-927-4685 WWW.DOMANIWEALTH.COM

Domani Wealth is a registered investment advisory, or RIA, firm focused on achieving a better tomorrow for our clients. As an independent firm offering wealth advisory services to individuals and businesses, we develop a plan that is unique to you and your specific needs and goals. Life is full of events and transitions that deserve the attention and experience of a wealth advisor. Whether the occasion is happy or sad, planned or unexpected, you can depend on the Domani team to provide sound financial guidance in the wake of life's most significant moments.

When it comes to wealth, we take a holistic approach. Our collaborative-service model offers our clients more than just surface-level advice, and each of our advisers contributes to the strength of the Domani team. We provide a depth of knowledge and expertise spanning a variety of financial planning issues, including wealth and retirement planning, investment management, trust and foundation services, family office services and business retirement plan services. With so many valuable resources under one roof, we offer a wide array of advice and guidance to help you

gain greater peace of mind in your most important financial decisions.

At Domani, our loyalty is to you. We're fee-only, and we don't collect commissions. For more than two decades, we have provided consultative services without the limitations of some larger firms that may hinder your investment options. Because we are not affiliated with brokerages or mutual fund companies, we offer you the objective, conflict-free advice you deserve, all made with your best interest in mind.

At Domani Wealth, we strive to see tomorrow the way you do.

## PROFILE 2020 INVESTMENTS

## Berkshire Investment Group

1408 PENN AVE., WYOMISSING, PA 19610  
610-371-0665 WWW.BERKSHIREINVESTMENTGROUP.COM

Berkshire Investment Group was founded in 1991 with the goal of providing investment planning for both individuals and small businesses primarily through the use of stocks, bonds, mutual funds, exchange-traded funds and annuities. A considerable portion of our business relates to retirement planning and 401(k) rollovers.

Additionally, we have considerable expertise in helping companies establish, monitor and manage their 401(k) retirement plans. In fact, we are devoting considerable time, staff and

resources toward helping companies and professional groups establish or update their 401(k) or employer-sponsored retirement plans.

As a small firm, we truly know our clients, and can devote the time that is necessary to earn our clients' respect and trust. We regard our organization as a hands-on investment firm, maintaining a manageable client base that allows us to provide consistent and quality personal service.

We point with pride to our long-standing affiliation with the nation's largest independent broker/dealer, LPL Financial,

member FINRA/SIPC. This partnership provides superior research, innovative technology and creative financial planning ideas for our clients. We consider LPL's size and stability to be a valuable asset in the areas of estate, tax and retirement planning.

We conduct business as an independent investment firm with a goal of providing competent, objective financial guidance. Accordingly, we are able to select investment programs and strategies that are best suited for our clients, not our parent company.

## ACCOUNTING

## A. Mazzo Accounting Services

901 FERN AVE., KENHORST, PA 19607  
610-775-9216 WWW.AMAZZOACCOUNTING.COM

Anthony (Tony) M. Mazzo, owner of A. Mazzo Accounting Services, has been providing accounting and tax preparation services to individuals and small- to mid-sized businesses in greater Berks County for more than 30 years. A. Mazzo Accounting Services' focus is to provide businesses with strong financial foundations that help their businesses grow.

"Business planning, proper financial reporting and cash management are vital to the success of a business," Tony said. "It's worth the investment to structure your business correctly from the start

to avoid problems that could prove costly down the line."

Tony is an Alvernia University alumnus with a cum laude degree in accounting, finance and business administration. As a former business accountant, accounting manager and corporate controller for a variety of diverse businesses, he takes a hands-on approach to advising business owners in financial reporting, tax preparation, budgeting and payroll systems that are best suited for their individual businesses.

A. Mazzo Accounting Services specializes in startup consulting,

business accounting services, tax planning and preparation payroll services.

Based in Kenhorst, A. Mazzo Accounting Services prides itself on serving its clients using only the highest standards of professionalism and integrity, ensuring excellent service and peace of mind. Tony is a member of the National Association of Tax Preparers (NATP), a member of the Small Business Resource Association (SBRA) and a member of the Pennsylvania Association of Notaries.

Find out more at [www.amazzoaccounting.com](http://www.amazzoaccounting.com).



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610-779-6000 WWW.LONGBARRELL.COM

In 2018, taxpayers felt the initial impact of the Tax Cuts and Jobs Act. The higher standard deduction made itemizing deductions less advantageous for many taxpayers, while others lost significant tax deductions because of the \$10,000 cap on deductible taxes and the elimination of certain miscellaneous deductions. Business taxpayers received some tax relief with the new 20% income deduction under the complex Section 199A regulations.

Taxpayers will see more changes for 2019 with revised forms and the recently passed Tax Extender and Relief Act. Certain tax provisions set

to expire in 2018 will now be extended into 2019. Tax filing compliance is complex and keeps changing. Various Pennsylvania and local tax filing requirements can't be overlooked.

We at Long, Barrell & Co. stand ready to assist individuals and businesses with their IRS and other filing compliances. Founded in 1968, Long Barrell is led by Jack Long Jr., Tracey Etchberger and Kimberly Fox. Now in our 52nd year, the firm offers the breadth of services that would typically be expected from a larger firm. We assist clients in computer consulting, tax planning and preparation, estate

planning and auditing and financial statement services. Besides offering these traditional services, Long Barrell has strategic alliances with top financial professionals and we offer investment advisory services. We deliver our services using a team approach, taking advantage of our experienced staff. By maintaining year-round client contact, we anticipate client accounting, tax and financial needs.

In the year ahead, we look forward to serving our existing clients and welcome new clients who need assistance with tax and financial matters.

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*William G. Koch & Associates has been, and continues to be, walking hand-in-hand with us, bringing trusted guidance, handling the complexities, and bringing us peace of mind and comfort for life's journey.*

— Paul & Barbara

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