



2022 CLIENT LETTER

415GROUP.COM

To our valued clients and friends,

I want to take this opportunity to reflect on some of the major wins we've experienced together over the last year, as well as some of the exciting developments on the horizon for our firm.

We entered 2021 hopeful that the COVID-19 pandemic would be behind us. Although the recovery has certainly felt tumultuous at times, I'm encouraged by the strength and perseverance our clients and our internal team demonstrated, as we quickly responded to evolving policies and guidelines. The last two years have not only proven our resiliency, but also our agility, as we embraced change together and found new ways to conduct business and move forward. I believe we can all enter this year confident that we'll continue to build on this progress.

Last year marked an important milestone for our firm – 40 years of service. We celebrated this occasion with our incredible team, past and present, at our alumni event in September. With more than 150 attendees at our office, we had a memorable night of enjoying delicious food, playing fun games, and most importantly, celebrating strong friendships.

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40 YEARS OF SERVICE**

I'm proud to say that even while navigating a demanding year, our firm continued to grow, adding more than 20 new members to our team. Our IT division continues to share in that growth, in large part due to the incredible value it offers through fully managed IT services.

Building on that same model for success, I'm excited to share with you a service we're launching called 415 Access. With this solution, we act as your virtual accounting department, handling all your bookkeeping and accounting needs. We're actively expanding this fully outsourced option to the QuickBooks consulting we've been providing to more than 600 existing clients, and have already seen a great demand for this service throughout the community.

This year, we expect our firm's rapid growth will continue, beginning with the opening of a second office location in Alliance, Ohio. This new location will allow us to better serve the clients in the Alliance, Salem, Sebring and Louisville communities and surrounding areas, and it will offer additional space for our expanding team. We look forward to welcoming you at our new location in early 2022 with a ribbon cutting ceremony.

As always, we remain incredibly grateful to you, our friends and clients.

Thank you for the support and trust you instill in our team each day. We value your partnership, and we wish you a healthy and successful year ahead.

Sincerely,

Richard Craig, Managing Partner, 415 Group

80

team members



1228

businesses served



3236

tax returns filed



SHINING THE SPOTLIGHT

We're proud of the talent and dedication our team demonstrates each day. Congratulations to the following team members who earned new certifications and promotions this year.

CERTIFICATIONS

MICHAEL HARVEY, **CPA**
DREW BOLOG, **CPA**
PHIL HANN, **CPA**
ISAAC ORELLANA, **CPA**
QUAID KLOHA, **CMA**
AJ MILLER, **MCSA**

PROMOTIONS

JEFF BUCKSHAW, **PARTNER**
DREW BOLOG, **MANAGER**
AMANDA DALPIAZ, **SUPERVISOR**
MORGAN GIEBEL CANNON, **SUPERVISOR**

QUAID KLOHA, **SUPERVISOR**
TONY PETERSON, **SUPERVISOR**
ISAAC ORELLANA, **SENIOR ASSOCIATE**
EVAN PETTY, **SENIOR ASSOCIATE**

A YEAR OF MEMORABLE MOMENTS



KATHY, FINANCIAL LEGACY SYMPOSIUM
ROUNDTABLE DISCUSSION



415 GROUP ALUMNI CELEBRATION



HOLIDAY HAPPY HOUR AND UGLY CHRISTMAS SWEATER DAY



NEW 415 INTERNS



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