

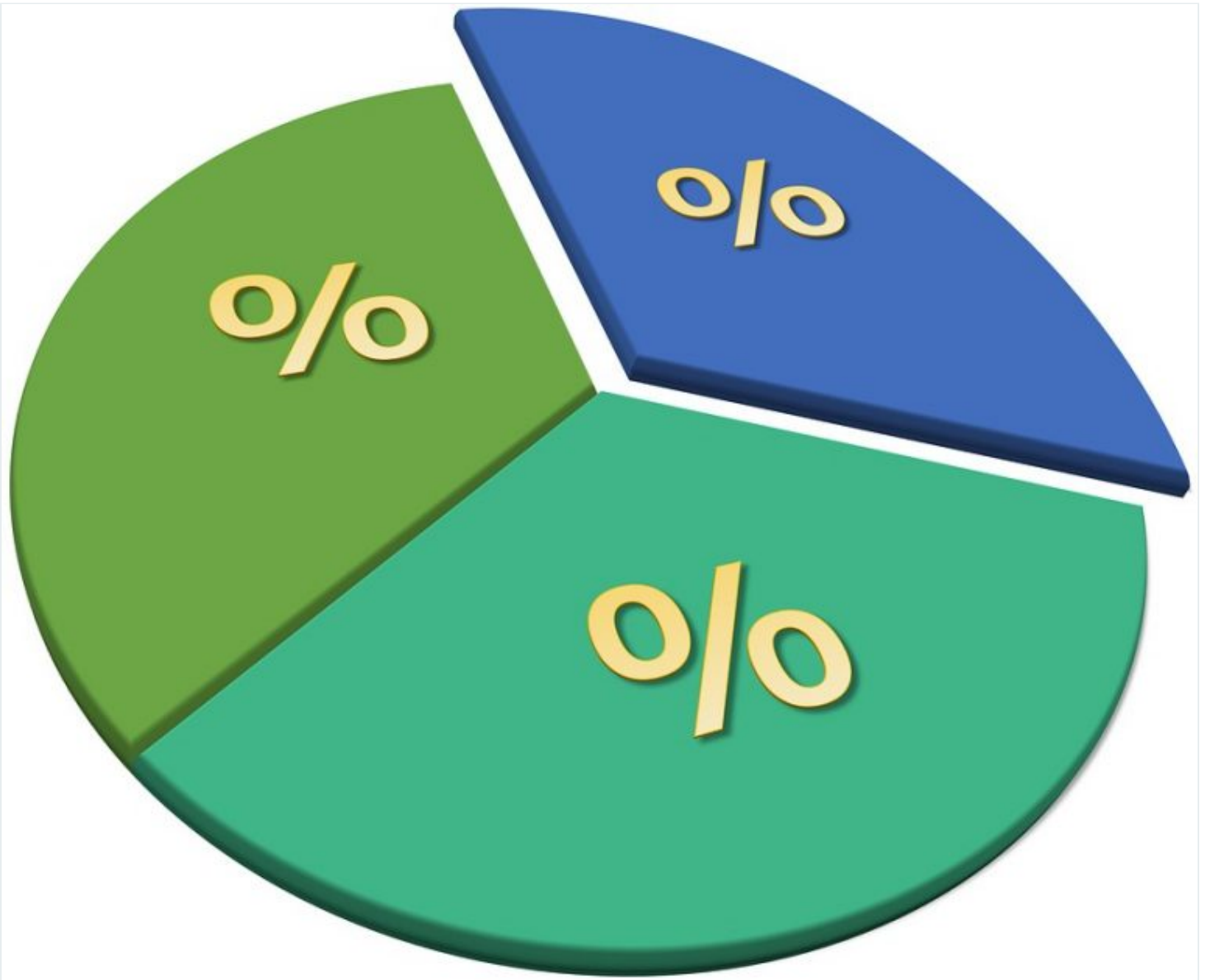
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and Financial Planning

Based in Chicago, Topel Forman is a full-service, 120-person public accounting firm whose services include tax, audit and advisory.

Sep. 29, 2022



Accounting firm Topel Forman L.L.C. has affiliated with Avantax Planning Partners, Avantax's employee-based RIA (registered investment advisor) to provide

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relationships and delivering value to clients for a firm like ours, and while we considered creating it on our own, we've seen the difficulty other firms had trying to do it, so we thought, what better way than having a partner with a system that's been proven successful in our industry," said Topel Forman Partner Robert Naselli. "During our due diligence I spoke with plenty of people, including accounting firms already working with Avantax Planning Partners. To us, with Avantax's robust back office, the tried-and-true systems in place, and all the back-office support they have, it just made sense for us."

Avantax Planning Partners was born from a CPA firm, working almost exclusively with accounting firms nationwide. The company provides a turnkey financial planning and wealth management model, honed during the past 30 years, to accounting firms nationwide.

"Topel Forman is a terrific fit with Avantax Planning Partners because, like us, they want to continue delivering great value to their clients, always keeping clients at the forefront, now in an advisory model," said Louie Rosalez, President of Avantax Planning Partners. "As with all our affiliates, a devoted and experienced Avantax planning team backed by our significant back-office capabilities will support Topel Forman as they help clients make the most important decisions of their financial lives."

Despite having upwards of 120 staff and partners, Naselli said the independent firm has kept its family feel while growing. Topel Forman provides high-level talent and expertise clients expect from a larger firm while maintaining a boutique firm's accessibility and collaboration where partners work with clients every day.

"Topel Forman and Avantax align so incredibly well when it comes to culture, business strategy, and how we serve our clients and business partners," said Todd Mackay, President of Wealth Management at Avantax. "Avantax presents a

significant value to accounting firms looking to provide financial planning and

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Forman, this is a natural progression in the client relationship.”

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