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clients in a wide array of industries for more than 60 years.

Isaac M. O'Bannon • Feb. 02, 2023

CBIZ



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and approximately \$55 million in revenue.

“We are excited to enter the Indianapolis financial services market with an established partner that has a reputation for providing outstanding client service and possesses the size and scale to accelerate growth and bring added value to our collective clients,” said Jerry Grisko, president and CEO of CBIZ. “Together, we will now be able to provide our combined clients with an expanded breadth of services backed by a national network of professionals. Somerset’s depth of expertise across numerous industries also creates strategic opportunities to better serve our current clients and attract new ones. We look forward to welcoming the Somerset team to CBIZ.”

“Being a part of a premier national accounting provider will ensure our clients continue to receive best-in-class service and solutions to help them grow their businesses successfully,” said Ben Kimmerling, president of Somerset. “Our shared vision of building relationships and delivering results make this a perfect combination, and will also provide our employees with additional training, development, and career growth opportunities.”

The Koltin Consulting Group advised both firms on the transaction. Allan D. Koltin, CEO of Koltin, said: “The combination of CBIZ and Somerset presents a unique opportunity for growth in the solid and expanding Indianapolis market. CBIZ and Somerset share a remarkable commitment to building meaningful client relationships and providing a broad array of services to meet their clients’ needs and the benefits of this transaction will be immediately evident to their combined clients and their team members.”

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