

Corporate Overview

Apple Growth Partners is a customer-focused, regional business advisory firm of Certified Public Accountants and industry experts serving growth-oriented, privately owned businesses. We blend our accounting expertise with advisory services including Business Valuation, Litigation Consulting, Succession Planning, Information Technology and Employee Benefit Planning. This unique blend, combined with the time we take to get to know our clients and their business goals, positions us to provide counsel, expert service, and wealth building ideas.

Apple Growth Partners has streamlined its organization through the creation of business niches to match size with personal service, industry knowledge and expertise. We have teams serving construction, financial services, healthcare/bioscience, automotive dealership, manufacturing & distribution, not-for-profit, real estate, and professional service organizations. Our participation in diverse industries and our long-standing relationship with legal, banking and investment firms create a tremendous referral and resource network for everyone.

Apple Growth Partners is an independent firm associated with Moore Stephens International, Ltd, one of the top 15 accounting networks in the world. Through this relationship, we have global access to over 366 member firms in 98 countries offering business consulting and accounting services. We have occasionally collaborated with many other Moore Stephens firms to provide comprehensive services when the extent of clients' requires us to capitalize on the knowledge and expertise of top worldwide firms. Our access to national and international resources gives us the ability to provide the best local solutions for your company.

Founded in 1943, Apple Growth Partners employs over 100 people at its four offices in Akron, Westlake and Mayfield Village, Ohio. We are both strategically and geographically positioned to serve private businesses in Northeast Ohio. In addition, our expertise in various services along with our Moore Stephens International Limited network association, have extended our reach to clients in southern, mid Atlantic, and midwest regions of the United States. Through the years, we have remained true to the vision of our founder, Jay Heinick, an entrepreneur with a unique ability to "see what could be" - we use what we know about the past to identify unique, successful growth strategies for our clients' future.

Corporate Facts

Executive Management

David J. Gaino, Chairman & Principal
Rick Archer, Principal
Ivan Mahovlic, Principal
Susan J. Peirce, Principal
Karl Driggs, Chief Operating Officer

Locations

Akron - West

1540 West Market Street
Akron, Ohio 44313
330.867.7350

Mayfield Village

6690 Beta Drive Suite 210
Mayfield Village, Ohio 44143
440.460.1980

Westlake

29550 Detroit Road
Westlake, Ohio 44145
440.871.8288

Year Founded

1943 by Jay Heinick in Akron, Ohio

Employees

110 - including 100 degreed professionals

Practice Areas

Accounting & Assurance
Business Advisory Boards
Business Succession Planning
Business Valuation
Employee Benefit Plan Design & Administration
ESOP Valuation, Formation & Consulting
Estate & Financial Planning
Fraud & Forensic Accounting
Information Technology Services
International Tax
Litigation Consulting
Merger & Acquisition Services
Tax Compliance, Research & Planning
Trust Compliance Services

Industry Specialization

Automotive Dealerships
Construction
Healthcare/Bioscience
Manufacturing/Innovation
Not for Profit
Professional Service Firms
Real Estate

Executive Management Biographies

David J. Gaino

Chairman & Principal

Dave Gaino is the Chairman of Apple Growth Partners, and serves as principal of audit and tax services. In addition, he leads the manufacturing team and personal financial planning specialty services team, and serves a number of clients in real estate and construction industries. Dave provides consulting services to business owners and professionals in the area of entity selection, ownership structure, advisory boards, personal financial planning, estate planning, succession planning, tax minimizing strategies and wealth building.

Dave graduated from Ohio University with a Bachelor of Science degree in Business Administration. He received a Master of Taxation degree from The University of Akron and has earned the designation of Personal Financial Specialist. Prior to joining the firm, Dave was a member of Ernst & Young's Cleveland audit practice, serving a number of large public clients and financial institutions.

Rick Archer

Principal

Rick Archer is a principal of Apple Growth Partners, joining the firm through a merger with Brott Mardis & Co. He specializes in audit and assurance services to automotive dealerships, not-for-profit, real estate, and manufacturing & distribution companies. He also provides business valuation, management consulting and tax planning services to corporations, partnerships and individuals.

Rick is a graduate of The University of Akron, completing a Bachelor of Science degree in Accounting. He earned both Certified Public Accountant and Certified Valuation Analyst designations and is a member of the AICPA, OSCP and IMA. Rick also maintains memberships on the Stow-Munroe Falls Library Board of Trustees, the Stow-Munroe Falls Rotary and the Stow-Munroe Falls Band Parents Association.

Ivan Mahovlic

Principal

Ivan Mahovlic is the lead principal of our construction and real estate team and a member of the firm's executive committee. His expertise is in tax compliance, research and planning services for closely held businesses. Additionally, he is the firm's technical consultant on real estate taxation, partnerships and low-income housing tax credits.

A graduate of John Carroll University, Ivan holds a Bachelor of Science degree in Business Administration and Accounting. He earned a Master of Taxation degree at The University of Akron. He has instructed at The University of Akron on Advanced Individual Taxation and has given presentations on taxation issues at numerous seminars and conventions. Ivan's professional affiliations include membership in the Ohio Society of Certified Public Accountants, the American

Institute of Certified Public Accountants, and the National Accounting Association. He is a member of the Home Builders Association, American Subcontractors Association, Construction Financial Management Association and the Northeast Ohio Apartment Association.

Susan J. Peirce
Principal

Sue Peirce is a principal of Apple Growth Partners, and heads our employee benefits specialty services team. Sue works with differing aspects of employee benefit plans, ranging from design to audits of plans. Her expertise includes a focus on qualified retirement plans and related design, compliance, non-discrimination testing, distribution and reporting issues. Sue consults with corporate clients on various issues regarding employee pension and benefit plan design and termination, including compliance with Internal Revenue Code. She advises clients with respect to establishment, amendment and administration of welfare benefit plans, and ERISA fiduciary issues. Sue also advises corporate clients on employee benefit aspects of asset purchase and stock purchase transactions as well as fiduciary responsibilities. She has extensive experience with employee plan audits and SAS 70 Reports of Third Party Administrators.

Sue completed a Bachelor of Science degree in Accounting at Kent State University and earned a Master of Taxation degree from The University of Akron. She is a member of the Ohio Society of Certified Public Accountants, served as an executive board member of the organization, and is a past president of the Akron-Canton Chapter. Sue is also a member of the American Institute of Certified Public Accountants.

Karl Driggs
Chief Operating Officer

Karl is the Chief Operating Officer of Apple Growth Partners, focusing on management of the firm and operating activities at all locations. He also provides consulting services in the areas of strategic planning, change management, operations management and human resources issues. Karl's prior experience with service and manufacturing firms included leadership roles in operations and financial management.

Karl graduated from Ashland University with a Bachelor of Science degree, majoring in Management Science, Marketing and Finance. He has also completed graduate coursework at Cleveland State University. In addition, Karl completed Hecht and Associates' Business Professionals Program for leadership and business management in San Jose, California, studying with prominent technology company leaders. Karl is an associate member of the Ohio Society of Certified Public Accountants and is a 2006 graduate of the OSCP's Center for Leadership. He is also an active member of the Association of Accounting Administration and Toastmasters International.

Communications Contact

Marcy Ream
Marketing Director

Marcy Ream manages the marketing and communications function at Apple Growth Partners and serves as the first point of contact for all media representatives. She drives the development and execution of all strategic marketing initiatives and develops all print and on-line communications content for the firm. Please contact Marcy at 330-867-7350 ext. 375 or by email at mream@applegrowth.com to locate the appropriate contact at Apple Growth Partners for your inquiry.