

Building The Firm Of The Future

An Interview with Richard Kopelman, Chief Executive Officer, Aprio

EDITORS' NOTE Richard Kopelman is the CEO of Aprio, a nationally recognized business advisory, tax, and accounting firm. A driven and inspirational leader, Kopelman has contributed to the firm's acceleration in the profession supporting the careers of more than 3,000 professionals who serve clients in all 50 states and more than 50 countries, speaking over 60 languages. During his tenure, Aprio has experienced significant strides in building the firm of the future, including 48 strategic mergers and acquisitions, and expanded its footprint to 42 U.S. offices and three international locations, driven by the firm's people-first and client-focused culture. Since Kopelman assumed the CEO role in 2013, Aprio has consistently ranked as one of the fastest-growing accounting firms in the nation, driven by a strong commitment to innovation and a forward-thinking approach. He has fostered a culture that prioritizes both professional development and enhanced client service, earning Aprio a reputation as a destination for top talent in the industry. Kopelman earned a BS degree in accounting from the University of South Florida. His community and professional affiliations include Next Generation Manufacturing, Founder and President; Georgia's Most Admired CEO, three times; Vistage International; Rotary Club of Atlanta; AICPA and GSCPA.



Richard Kopelman

FIRM BRIEF Aprio (aprio.com) is redefining what it means to be a global advisory and accounting firm. Aprio helps businesses and individuals Account for Anything™ – delivering clarity and confidence in a world full of unknowns. Aprio is the brand name under which Aprio, LLP, and Aprio Advisory Group, LLC deliver professional services to clients worldwide. Aprio Advisory Group, LLC provides advisory, tax, legal, wealth, and talent solutions to help build value, drive growth, manage risk, and protect wealth, while Aprio,

LLP delivers audit and attest services with uncompromising quality and integrity. Aprio is consistently recognized as a top workplace, celebrated for transformative growth on the Inc. 5000 and Inc. Power Partners lists.

Will you discuss your career journey?

I found accounting at a pivotal moment when a professor saw potential in me that I didn't yet see in myself. Accounting gave me structure, opportunity, and the ability to solve real-world business problems, work closely with business owners across industries, and help leaders make better, more informed decisions. I joined Aprio in 1992 as a staff accountant and never left. Early in my career, I worked as a generalist, which turned out to be incredibly formative. It allowed me to see how different businesses operated and what truly mattered

to their leaders. I loved learning how clients built their companies, what they were passionate about, and where they needed help navigating complexity. Over time, that curiosity led me to specialize in manufacturing and distribution. I eventually became Aprio's first Manufacturing and Distribution Practice Leader, working closely with leaders who were building, scaling, and modernizing their operations. While serving those clients, I founded the NextGen Manufacturing group. The idea was simple: create a space where industry leaders could connect, learn from one another, and think more intentionally about the future. That experience reinforced something I still believe today: that the best solutions often come from bringing the right people together and giving them room to share ideas and learn.

In 2013, I became Managing Partner and CEO of Aprio and realized that everything I had learned as an advisor – listening first, asking the right questions, and earning trust – translated directly into leading a firm. I've helped shape Aprio's evolution and build the firm of the future, focused on delivering the solutions and services our clients will need next, while always aiming to add value to trusted client relationships.

How do you define Aprio's mission?

At its core, Aprio's mission is simple: to help entrepreneurs and business leaders Account for Anything™ and move forward with confidence, no matter what comes next. We're reimagining how we serve clients by working in more integrated ways and delivering more value across every stage of their business. That means bringing advisory, tax, accounting, legal, talent solutions, and wealth services together under one roof, so clients aren't managing multiple firms or disconnected advice. In a world of constant disruption, business leaders and entrepreneurs need advisors who can provide forward-looking advice and insights, follow-through, and who can move as fast as they do. We use a simple lens to guide every decision we make: Does this create a better experience for our clients? That question shapes how we grow, how we invest, and how we build new capabilities.

Will you provide an overview of Aprio's services and capabilities?

As of today, Aprio is the 20th largest business advisory and accounting firm in the U.S. We deliver integrated services across accounting and audit, tax, advisory, wealth management, talent solutions, and legal, supporting clients

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globally across the full business and financial lifecycle with more than 3,000 team members.

Our integrated professional services model brings these capabilities together in a coordinated structure, so clients do not have to manage fragmented advice across multiple firms. We serve entrepreneurs, middle-market companies, private equity-backed businesses, closely held enterprises, and high-net-worth individuals, often at critical moments such as expansions, transactions, capital events, operational scaling, and generational transitions.

What makes our model effective is the intentional way those capabilities work together. For example, a client navigating a transaction may need tax structuring, audit readiness, operational advisory, legal guidance, and personal wealth planning at the same time. Our teams collaborate across service lines and industries to meet clients where they are, to deliver insight that is aligned and grounded in the realities of the client's business and sector when they need it, on their terms. We maintain deep industry specialization across multiple industries, so our guidance reflects real-world operating environments.

How important has it been to maintain Aprio's culture as the firm has grown?

Maintaining Aprio's people-first culture as we have grown has been critical to our success. Culture at Aprio is clearly defined, actively practiced, and reinforced every day through our 31 Fundamentals – principles like listen generously, be relentless about improvement, and build meaningful personal relationships – which guide how we lead, collaborate, and serve our clients. Having started my career at Aprio as a staff accountant, I have seen firsthand how a strong, people-first culture creates consistency, trust, and accountability. As we have grown into new markets, expanded services, and welcomed new teams, the 31 Fundamentals have provided a common language and shared expectations that help integrate teams while preserving what makes Aprio special. They also remind us to keep things fun even as we pursue high standards and ambitious goals. By anchoring our decisions in the Fundamentals, we ensure that transformation, collaboration, and high standards remain central to how we operate. This approach allows us to grow responsibly, develop leaders at every level, and deliver consistent, high-quality experiences for clients.

How is AI reshaping professional services, and how critical is it to make sure that AI does not replace the human touch and personal relationship?

AI is reshaping professional services, and the biggest gap I see is not capability, but exposure. Too many leaders underestimate what AI can do because they have not applied it inside real workflows. At Aprio, AI modernizes our work by automating foundational tasks so our professionals can spend more time applying judgment, deepening trust, and advising clients. I model this personally by building and testing new AI agents to improve how I work and to stay grounded in how the technology is evolving for our teams. One example is a daily

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prep agent that briefs me on meetings, priorities, and client issues. It helps me show up more informed, focused, and present.

Firmwide, our five-year, \$300 million investment in a fully integrated AI and automation ecosystem, including the acquisition of TimeCredit, embeds AI directly into end-to-end workflows across all services. AI simplifies work, accelerates careers, and gives our professionals more time to do what clients value most: think, listen, and advise.

Do you feel that the type of careers the accounting profession offers is well-understood by the next generation coming into the workforce?

Accounting students are some of the most curious, sharp, and practical problem-solvers, and I don't think many of them fully realize just how many doors this profession can open for them. Given how quickly our profession is evolving, it's understandable that the next generation may not yet see the full range of opportunities now available in accounting and advisory. I believe we have a responsibility to make those possibilities clear. Today, professionals can build careers that combine technical skill, technology, and client leadership. Work that once centered on preparation now focuses on insight, problem solving, and advising clients on growth, risk, and strategy. This is a people-driven, high-impact profession, and we need to be explicit about how much it has changed and where it can lead. At Aprio, early-career professionals are exposed to complex client challenges from day one. They are building skills in analytics, strategy, client leadership, and technical excellence much earlier than in the past. With AI and automation handling more foundational tasks, they can focus on delivering real value sooner in their careers.

What do you feel are the keys to effective leadership?

I tend to think about leadership in three core principles. First, be clear about your purpose. Great leaders are clear about where they're going and why it matters. They communicate consistently – not just what decisions are being made, but why – so people understand how their work connects to the bigger picture and can move forward with confidence. Second, trust is paired with accountability. I believe trust and communication rise and fall together.

Clear expectations and consistent communication create alignment and confidence. Trust is strengthened through accountability. When you hire talented people, you give them ownership, room to lead, and support to execute, while holding everyone to high standards. That balance allows leaders to grow at every level and enables the organization to scale without losing what makes it work. Third, be adaptable. The world around us – technology, markets, and expectations – is constantly changing. The best leaders anticipate change, stay curious, and focus on solutions to build resilient organizations that can evolve and thrive over time.

When you look to the future of the industry, what excites you the most?

I'm excited by the opportunity to build firms that scale thoughtfully, innovate continuously, and deliver deeper, more meaningful impact for clients. Firms of our size are uniquely positioned to shape what the next generation of professional services looks like by how we invest in people, technology, and integrated service models. One of the most energizing opportunities is scaling talent while strengthening culture and consistency. As firms grow and bring new teams together, there is potential to create environments that are people-first, highly collaborative, and grounded in deep technical and industry specializations. When done well, growth amplifies both talent and client experience.

As I've mentioned, I am excited by the pace of advancement in technology and AI. The acceleration of transformation is creating new ways to modernize workflows, upskill professionals, and embed automation into everyday work. When paired with strong data foundations, security, and governance, technology becomes a powerful enabler that elevates quality, insight, and speed while allowing professionals to focus on higher-value advisory work.

Perhaps most compelling is the evolution of client needs, and the role firms can play in meeting them. Today's clients face interconnected tax, legal, operational, and financial challenges that require coordinated, multidisciplinary guidance. This creates an opportunity for firms to move beyond traditional service models and become fully integrated strategic advisors to serve as life-long partners. ●