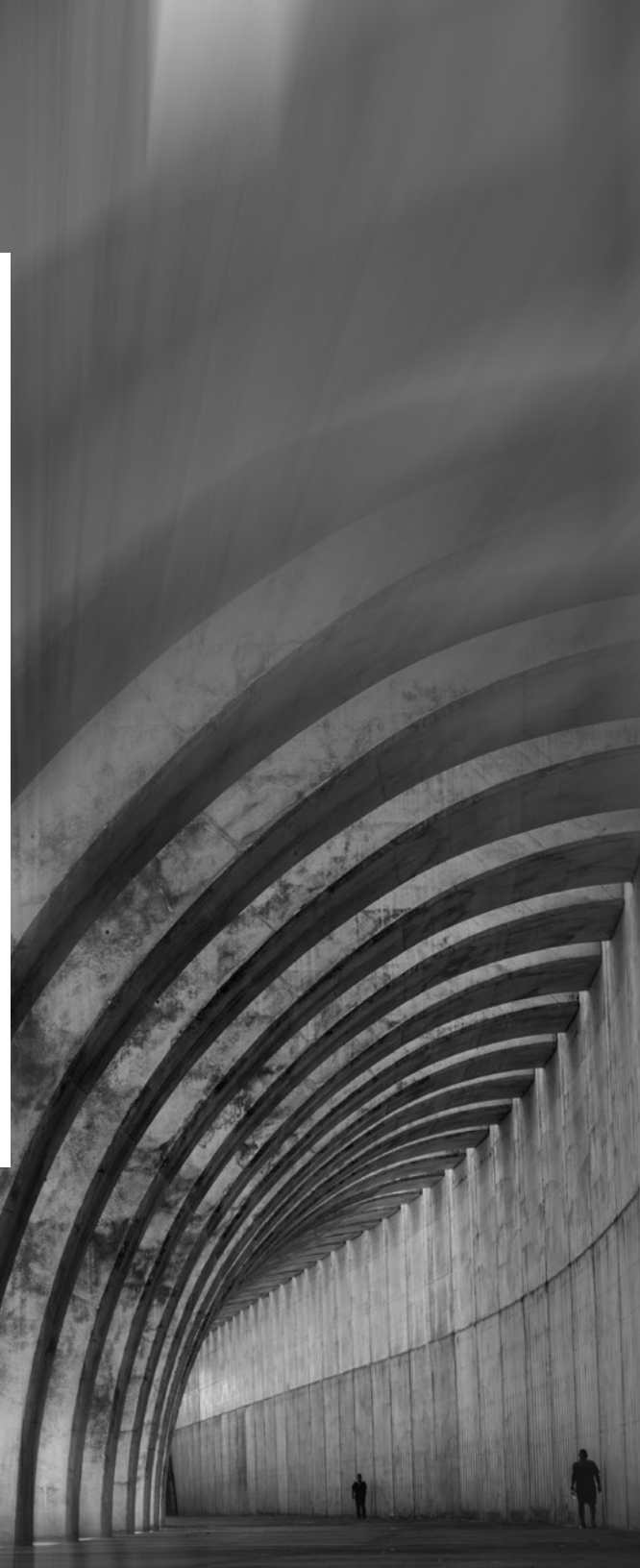




Partner resource guide





How we work with referral partners to solve complex client challenges

Strong client relationships are built through trust. When your clients face challenges beyond your core expertise, the partners you choose speaks volumes.

We're the partner you can count on.



Our teams work alongside attorneys, bankers, private equity professionals and other advisors to help their clients navigate complex business, financial and technology challenges. Whether the need is focused or multi-disciplinary, we approach every engagement with the same mindset: respect the relationship, solve the problem and deliver results that strengthen the client's position.

This guide offers a quick look at how we work with partners, when to bring us in and the capabilities we can deliver to your clients.



Our operating principles

We're different than most service providers because we have the right people backed by the right platform.



End-to-end expertise

With end-to-end expertise and robust capabilities across a variety of industries, we use a combination of scale and agility to deliver world class results.



Full access, no ego

We are a hands-on, integrated team led by senior leaders who are engaged, accessible and responsive from start to finish. This ensures seamless continuity of service with a human, authentic touch.



Uncompromising problem solvers

We have a bias for action. We pair curiosity with commitment to customize solutions for our clients without compromising outcomes.



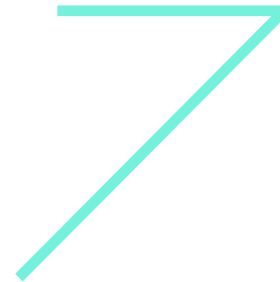
Cutting edge technology and innovation

We augment our expertise with a powerful combination of proven technologies and emerging innovations, to empower our clients to see, and stay, two steps ahead in a rapidly changing world.



Partners in impact

We are focused on impact. The kind that ensure compliance, enables growth and equips clients with the systems, tools and capabilities to make impact repeatable and scalable.



A true partner approach

We believe referrals should feel like partnerships — not transactions.

When you introduce us to a client, our goal is simple: make you look good while helping your client solve real problems.

Here's what that means in practice:

We respect the relationship

We never sell around you or bypass the trust you've built with your client.

We keep you informed

You'll always know how the engagement is progressing and where things stand.

We stay aligned

Before engaging with a client, we align with you on the situation, expectations and communication.

We think long term

Our goal isn't a one-time project. We focus on building relationships that benefit you and your clients over time.

We clarify roles upfront

Everyone understands who is doing what, so there's no overlap or confusion.





When should you bring us in?

Many of the situations our partners encounter involve challenges that cross disciplines—financial, operational and technical.

This is where our integrated teams can make a difference.

You may want to include us in the conversation when:

- A deal is moving from diligence to integration
- A client's systems or data are slowing growth or limiting visibility
- Leadership senses risk but can't clearly identify the source
- Portfolio companies are scaling faster than their infrastructure
- A client needs help that spans more than one discipline

Often, we're able to address the initial issue while identifying other areas where we can help strengthen the organization.



Our core capabilities

Our teams work across business, financial and technology disciplines to solve complex challenges. Depending on the situation, we may engage in one focused area or bring together specialists from multiple practices.

A tool you can use with clients today

This checklist is a quick way to prepare for client conversations and surface gaps across financials, systems, tax and risk. It's designed to be used in real time to guide discussion and highlight where additional support may be needed.



Download the
checklist here



Where we thrive



Financial services



Government



Life sciences & healthcare



Manufacturing & distribution



Not-for-profit & education



Private equity



Professional services



Wholesale & supply chain

Risk management

- Cybersecurity
- Forensics and valuations
- Governance, risk and compliance
- Transaction advisory

Enterprise application consulting

- Data and AI
- ERP, CRM, HCM products and services
- Regulatory, quality and compliance

Compliance services

- Audit and assurance
- IT controls
- Tax services

Business process solutions

- Finance and accounting services
- IT and security managed services
- Marketing and communications

How we help clients thrive



Why partners choose to work with us

Our partners tell us they value three things: expertise, reliability and respect for their client relationships.

We take that seriously.

Multi-disciplinary depth

Our teams bring expertise across financial, operational and technology disciplines—without internal silos.

Experience with complex organizations

We regularly support private equity firms, middle-market companies and growing organizations.

Understanding of deal environments

Many of our teams are experienced working within transaction timelines and portfolio company environments.

Relationship-first mindset

We protect and strengthen the partner relationship while serving the client.

Scalable support

We can address narrow challenges or complex, multi-faceted issues as needs evolve.



A resource for you and your clients

Beyond project work, we aim to be a practical resource for our partners.

That includes:

- Industry insights and market outlooks
- Thought leadership and practical guidance
- Client-ready checklists and tools
- Access to subject matter specialists when questions arise

If a client situation comes up and you're not sure how to best move forward, we're always happy to talk it through.



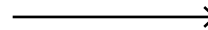
Let's start the conversation

Whether you're navigating a complex client situation or simply exploring how we can support your clients, our team is always open to the conversation.

Referrals, introductions or informal discussions are all welcome.



Visit the Sikich
Partner Portal for
more information and
to submit a referral.



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