



Nancy Turo <nturo@peace-caa.org>

Audit and Tax RFP - Wipfli

1 message

Mike Webber <mwebber@wipfli.com>

Thu, Apr 2, 2026 at 9:47 AM

To: Nancy Turo <nturo@peace-caa.org>

Cc: Nathan Lipton <NLipton@wipfli.com>, Jorge Estrada <Jorge.Estrada@wipfli.com>

Hi Nancy,

I hope all is well! Attached are the technical proposal and pricing information for audit and tax services from Wipfli. Please feel free to reach out with any questions. Thank you for the opportunity to submit this proposal and we hope to partner with you for audit & tax services in the future.

Take care,

Mike

Mike Webber, CPA*Partner**Pronouns: he/him/his*

+1(608) 270-2994 Office

Wipfli Advisory LLC, Wipfli LLP

2501 West Beltline Highway, Ste 501 Madison, Wisconsin 53713

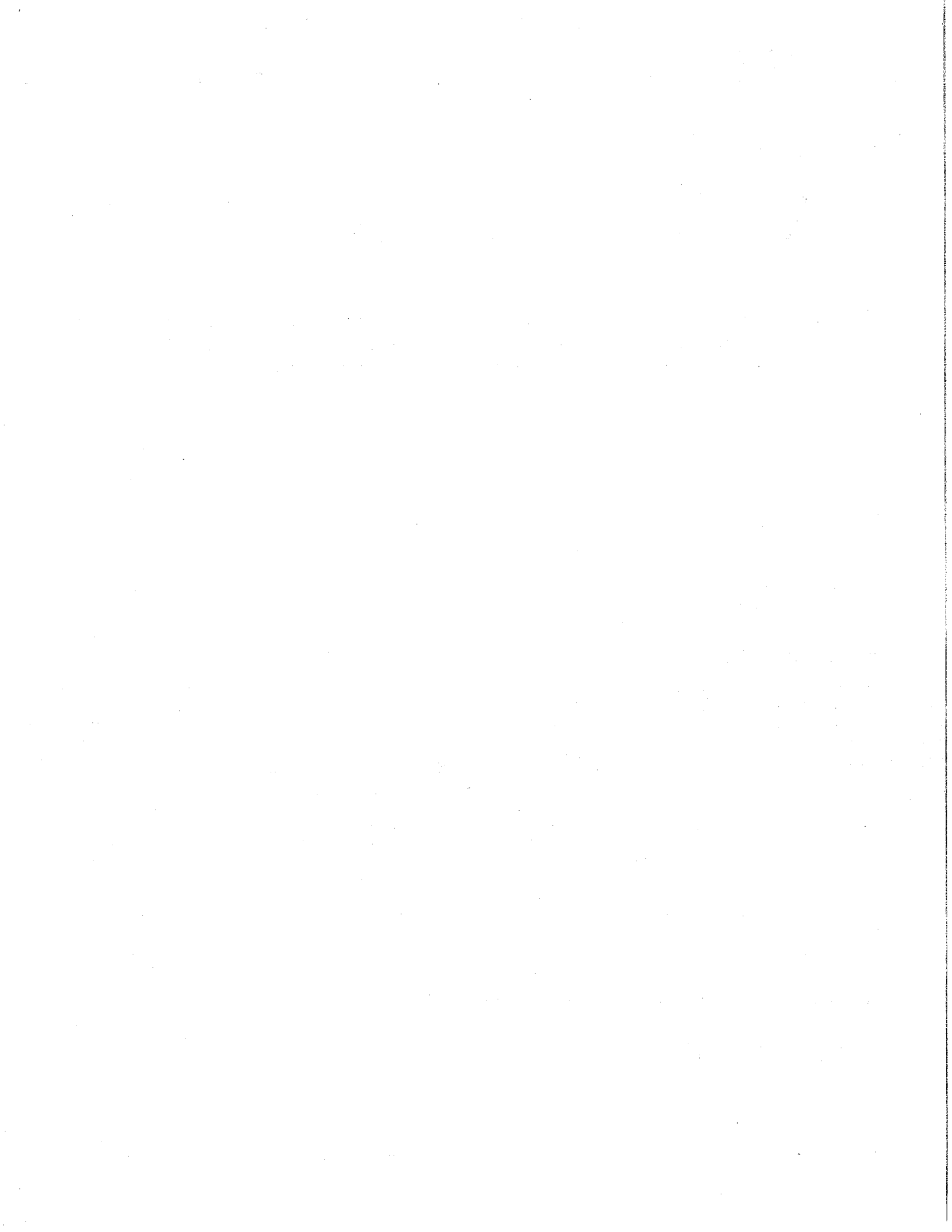
wipfli.com / [LinkedIn](#)

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2 attachments **PEACE INC and Wipfli - Audit and Tax Proposal 2026.pdf**
2226K **PEACE INC and Wipfli - Audit and Tax Your Investment 2026.pdf**
245K



WIPFLI

YOUR INVESTMENT



“Wipfli was generous with their time, putting in extra hours to help us get up and running with a system that meets our unique needs.”

Lisa Munson, CFO, Milestone, inc..

YOUR INVESTMENT

Our goal is to provide PEACE, Inc. with exceptional, timely service and valuable advice at competitive rates. It centers around service excellence, communication and our continuing quest to be on the leading edge of industry changes.

Right from the start of the engagement, you can expect Wipfli to understand your industry and provide skilled assistance. Our well-planned approach ensures an efficient and effective experience.

Professional Services	2027	2028	2029	2030	2031
Uniform Guidance Audit	\$52,000	\$53,500	\$55,000	\$56,500	\$58,000
Retirement Plan Audit**	\$13,000	\$13,750	\$14,500	\$15,250	\$16,000
IRS Form 990	\$4,000	\$4,250	\$4,500	\$4,750	\$5,000
Total*	\$69,000	\$71,500	\$74,000	\$76,500	\$79,000

*Direct travel expenses of up to \$5,000, plus an administration and technology fee of 6% are included in the amounts noted above.

**Pricing for the retirement plan audit is based on the years ending December 31, 2026 through 2030

Value-added audit

While conducting an audit can be very similar from accounting firm to accounting firm, the Wipfli difference includes the value you receive from our audit process. Our audit services approach is designed to deliver you with timely, cost-effective, high-quality professional services. It centers around service excellence, communication and our continuing quest to be on the leading edge of industry changes.

Right from the start of the audit engagement, you can expect Wipfli to understand your industry and provide skilled assistance. Our well-planned approach ensures an efficient and effective audit experience.

Assumptions

The quote above is based on the following assumptions that PEACE, Inc. will:

- Be active participants in the process and effectively communicate with the auditors.
- Perform a comprehensive financial close process, with minimal adjusting of journal entries.
- Prepare financial statements, including footnotes.
- Provide requested information in a timely fashion.

- Make no significant changes in the operation of the organization.
- Understand that the pricing above does not include any additional audit or consulting procedures that might need to be performed as a result of new accounting or auditing standards. We will discuss with you the impact of any potential standards and whether there will be additional fees if the situation arises.
- Assist in the preparation, communication and resolution of confirmation exceptions.

Cost overruns

We work closely with your management team to contain the cost of professional services. We do this by:

- Making recommendations to improve efficiency and controls.
- Obtaining a comprehensive understanding of your year-end closing process. This avoids misunderstandings and inefficiencies for both your personnel and ours.
- Preparing a comprehensive listing of client-prepared workpapers.
- Using technology efficiently in workpaper preparation and audit testing.

YOUR INVESTMENT

We will work with PEACE, Inc.'s staff to agree on required schedules, informational needs and due dates. Any fee adjustments required if assumptions are not met will be discussed and agreed to by PEACE, Inc. and Wipfli before additional work is performed.

Changes to the scope

Things happen. We've all been there. But adjusting to change in the best way requires transparency and communication. If there are changes after the engagement begins, we will discuss revisions to the scope with you and obtain your approval before moving forward. Any additional work outside of the above estimates will be discussed with your management before it is performed and billed.

Fees

Personnel	Standard billing rates for the last three years
Partner	\$500
Senior Manager	\$400
Manager	\$365
Senior	\$250
Staff	\$190

Budgeted hours

Professional	Total dollars	Billing rate	Hours
Partner	\$ 6,500	\$500	13
Senior Manager	10,400	400	26
Manager	12,775	365	35
Senior	20,000	250	80
Staff/Admin	20,900	190	110
Subtotal	\$ 70,575		264
Out of Pocket Expenses	5,000		
Discount	(6,575)		
Total	\$ 69,000		

CONTACT INFORMATION

Jorge Estrada

Business Dev Representative

Jorge.Estrada@wipfli.com

414.259.6739

Mike Webber

Partner

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WIPFLI

'Wipfli' is the brand name under which Wipfli LLP and Wipfli Advisory LLC and its respective subsidiary entities provide professional services. Wipfli LLP and Wipfli Advisory LLC (and its respective subsidiary entities) practice in an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations, and professional standards. Wipfli LLP is a licensed independent CPA firm that provides attest services to its clients, and Wipfli Advisory LLC provides tax and business consulting services to its clients. Wipfli Advisory LLC and its subsidiary entities are not licensed CPA firms.

PROPOSAL FOR **PROFESSIONAL** SERVICES



Solutions now.
Direction for the road ahead.

PEACE, Inc.

WIPFLI

April 3, 2026

PEACE, Inc.
Attn: Nancy Turo
217 South Salina Street
Syracuse, NY 13202**Hello Nancy,**

From your mission comes your strength and vision for bringing positive change to the world. It's how you make a difference. Anyone you form a relationship with — from donors to community leaders — needs to align with your mission, including the firm you choose to meet your audit and tax needs.

Work with people who are just as passionate about your mission as you are. Just like you are committed to working with people to build better lives and stronger communities, Wipfli lives our values of integrity, caring, excellence, teamwork and perseverance to strengthen communities by helping you excel at meeting your mission.

Our professionals see themselves as an extension of your team, and not just vendors who will do the work and get back to you when it's convenient for them. Communication, responsiveness and a willingness to share — that's what's important in any relationship.

In this proposal, you'll learn about our long history of working with Community Action Agencies, the skills and experience we bring to the table and why we're best suited to meet your organization's needs.

Please take a few moments to enjoy this nonprofit audit client impact story, How Wipfli serves grant funded nonprofits. <https://vimeo.com/605700777>.

As you make your final decision, we'd like to keep the lines of communication open. We welcome feedback from you on this proposal and ask that you call us at 414.259.6739 or email Jorge.Estrada@Wipfli.com to discuss any concerns, observations or questions with us before making your final decision.

Our team welcomes the opportunity to not only meet your audit and tax needs but also help you further your mission.

Sincerely,

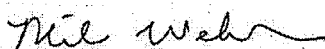
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Overview

This proposal outlines a comprehensive strategy to complete the Uniform Guidance Audit, 401k Audit and Form 990 in a timely and efficient manner based on over four decades of experience working with nonprofits and organizations that serve communities by providing access to services that they need to thrive.

Implementation timeline

The Uniform Guidance Audit and Form 990 will be presented to your board of directors in May 2027 in accordance with your RFP. The 401k audit schedule will be coordinated with PEACE, Inc.

Our experience

You'll work with experienced professionals with 10+ years of direct experience working with organizations like yours. With over 3,500 current and active nonprofit clients and 150+ dedicated professionals to serving these agencies and communities through finance, HR, technology, and organizational development, Wipfli offers a comprehensive partnership to PEACE, Inc. The many regulatory and compliance requirements you face as an agency are central to our grant-funded audit practice, which is why Wipfli ranks at the top in number of single audit clients across categories. Consistent, cohesive and dedicated, our team provides you with an expected experience year after year.

You asked for
Scope 1: Uniform Guidance and 401k Audits
<ul style="list-style-type: none">▪ Timely completion of the annual Uniform Guidance and 401k audits▪ Availability for technical questions that may come up during the year▪ A streamlined and efficient process along with transparent communications of recommendations and findings
Scope 2: Form 990 Preparation
<ul style="list-style-type: none">▪ The accurate completion of the annual IRS Form 990 and CHAR 500▪ Availability for technical questions that may come up during the year

We will deliver
Scope 1: Uniform Guidance and 401k Audit
<ul style="list-style-type: none">▪ Routine "on-call" consultations throughout the fiscal year to address technical questions▪ Proactive planning and execution of audit procedures to allow for timely presentation of the UG Audit at the May 2027 board meeting and presentation of the 401k audit at a mutually agreed upon board meeting if requested.▪ Provide best practice recommendations throughout the audit process
Scope 2: Form 990 Preparation
<ul style="list-style-type: none">▪ Proactive consultations throughout the year free of charge regarding tax related questions and potential regulatory changes▪ Accurate and timely filing by the June 2027 board meeting to avoid penalties and maintain compliance



We are relentless focused on helping clients

**ONE
ONE
YOU.**

A black and white photograph of a man with a beard and a woman smiling in a professional setting. The man is in the foreground, looking to the right, and the woman is behind him, also smiling. The background is slightly blurred, suggesting an office or medical environment.

OUR EXPERIENCE TO MEET YOUR NEEDS

“We never knew what the price was for a product unless we called the vendors. So now pricing is accurate, and we can also see invoicing, which helps us better control pricing and provides opportunities to lower our inventory values.”

Tim Olson, Supply Chain Manager, St. Croix Regional Medical Center

UNDERSTANDING WHO YOU ARE, MEETING YOU WHERE YOU ARE

Aligned goals and objectives

Like PEACE, Inc. Is focused on empowering participants to achieve self-sufficiency, we offer best practice recommendations to help our clients achieve this. We hold ourselves to the highest standards, valuing client service, integrity, respect, team and excellence above all else. As a result, we will earn your trust through sustained excellence in delivering high-quality professional services.

Your current challenges and opportunities

At Wipfli, we recognize that nonprofit companies face unique challenges in managing financial performance, supply chain efficiency and multi-location operations. Our tailored advisory, tax and financial services help brands like PEACE, Inc. navigate these complexities with confidence.

Client satisfaction and retention are critical to us, which is why our ultimate goal is to become a trusted advisor that you can rely on for all your financial, operational and technical needs.

Service that exceeds your expectations

Provide large-firm resources with local services and accessibility

- Enjoy the significant experience and specialized knowledge you'd expect in a large, national firm, with the personal service and hometown accessibility of a local firm.

Bring a fresh perspective

- Wipfli is dedicated to improving your business, helping it grow and keeping it on the path to success.
- We often see beyond the scope of the engagement to offer helpful advice, valuable insights and best practices that can improve performance.
- We bring outside objectivity and insider knowledge to uncover new opportunities.

Keep services and solutions focused on you

- Enjoy our client-centric approach. Our services are always tailored to you.
- You represent a relationship, not a transaction, and we view you as an important client. As such, we put our top skills and efforts to work for you.



- Your feedback is important to us. We regularly measure client satisfaction and use the results to strengthen our client-focused relationships.

Deliver work in a timely manner

- Together, we agree on a timeline with key milestones and assignment responsibilities spelled out, so you always know what to expect and when.
- From initial meetings to final deadlines, we work efficiently, putting our best time management skills to work.

NONPROFIT EXPERIENCE

When you choose Wipfli, you choose a firm that not only specializes in grant-funded programs but also brings the same passion to furthering your mission that you do.

Curiosity, clarity, results

- **85+ years of working with nonprofits:** Wipfli understands the mission focus on nonprofit organizations and the challenges they face. Through deeply invested relationships and boundless curiosity, we bring clarity that drives results.
- **Solving complex problems:** By acting with empathy and harnessing human-centered design principles, we help ensure our clients receive solutions to address their needs, no matter how complex.
- **Large and diverse client base:** Because we work with thousands of nonprofits across the globe, we can deliver the guidance and benchmarking these organizations need to make more strategic decisions and achieve their goals.
- **Innovating with curiosity:** At Wipfli, we are driven to discover. We thrive on innovation and find a way. And with extensive capabilities in the latest tech, we apply new methodologies to solve our clients' biggest challenges.

Resources and thought leadership

We constantly update clients on the accounting and business issues facing nonprofit organizations today. Below are just a few of the resources we offer.

- **Wipfli Insights** — Each month, we bring you thought-provoking articles on long-range organizational subjects — from people, processes and technology to financial management.
- **Nonprofit webcasts** — Webcasts are available to educate and train your associates to use best practices and stay in compliance.
- **Speaking engagements and workshops** — We frequently participate in speaking engagements and workshops nationwide on topics including board governance and financial accounting standards updates.
- **Annual nonprofit conferences** — Our annual national conference in Las Vegas includes sessions on risk management and fraud, software systems, leadership and management, finance, human resources, compliance and technology.
- **My Wipfli nonprofit and government membership service** — This flexible tool provides the latest updates, regulatory documents, best practices and advice.

Nonprofit, government and education fast facts

15

Total number of partners in the nonprofit, government and education practice.

131

Total number of associates in the nonprofit, government and education practice.

3,695

Total number of nonprofit, government and education clients

91

Client Experience Index score from nonprofit, government and education clients

SERVING GRANT-FUNDED ORGANIZATIONS LIKE PEACE, INC.

Prior auditing agencies with funding from federal and state programs

Many of the grant-funded organizations that Wipfli works with receive similar funding to PEACE, Inc. A few of your largest federally funded programs — Head Start, CSBG, and Weatherization — are some of the programs we often audit. This experience has allowed us to develop templates for our testing so that we only request those items we need and efficiently audit your significant programs.

Proud partnerships

We bring best practices for operating numerous federally funded programs. Wipfli collaborates with other organizations to tackle complex issues that arise for organizations like yours. We have been a partner of **the National Community Action Partnership (NCAP)** for many years and are now recognized as an Endorsed Vendor of NCAP.

NCAP has contracted with Wipfli to provide fiscal services to grant-funded organizations and produce toolkits and other products for several agencies to use to meet their various compliance requirements. Wipfli associates have presented at NCAP's conferences for over 20 years. Wipfli has also partnered with **Community Action Program Legal Services, inc.** (CAPLAW) by presenting at their conferences and collaborating on toolkits.

Industry knowledge and experience

Work with a firm that delivers assurance, accounting and performance-improvement services to thousands of nonprofits in more than 32 states. We've even served as advisors to several states that have developed audit guides and audit systems for nonprofits, giving us the experience to easily identify common issues and share best practices.

Mike Webber is the engagement partner on nearly 30 of those community action agencies, a number that is higher than the entirety of community action agencies served by many firms.

Nonprofit training fast facts

5,000

Nonprofit professionals who receive Wipfli training annually

40

Number of years designing and facilitating training content

25

Years we've hosted **Stronger to Serve** conference

1,000

Average number of attendees at Stronger to Serve

EXPERIENCE AUDITING GRANT-FUNDED NON PROFIT ORGANIZATIONS LIKE PEACE, INC.

Your engagement team has significant experience working with organizations that operate complex federally funded programs like yours. Our partners and managers work exclusively with nonprofit organizations and specialize in performing single audits in accordance with Uniform Guidance regulations, bringing unparalleled knowledge and skills in the areas that most affect your financial health to your engagement.

350+

Wipfli completes 350+ single audits in accordance with *Uniform Guidance* annually, for grant-funded organizations.

We understand that having strong internal controls and following the rules governing how you can and cannot spend federal dollars are keys to fiscal management and overall compliance in your organization. Having an auditor that is passionate about the programs you operate, understands the requirements and is available throughout the year to answer your questions are some of the ways we help you successfully deliver on your mission and stay in compliance.

We are specialists in the appropriate General Accounting Office and other pronouncements regarding the audits of grants and governmental and nonprofit organizations and related publications.

We are not only familiar with these publications but also have provided training sessions nationwide on the use of the following pronouncements and publications:

- Government Auditing Standards
- Auditing Compliance Supplement
- CFR Part 200, Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards

Supporting community action agencies

Agencies like yours face countless regulatory requirements and other unique industry challenges. Working with a firm that has a full understanding of these challenges and the solutions that meet them helps ensure your needs are met the right way, the first time around. From technology upgrades to strategic planning and staff training, our specialized consultants provide more than audit and tax to our nonprofit clients.

Our extensive list of advisory services coupled with our deep knowledge of CAAs, uniquely positions Wipfli as a premier advisor. In addition, we are a top provider of training on regulations and best practices, having successfully worked with over 11,000 attendees through 500 training sessions. Wipfli's Stronger to Serve national training conference provides the most comprehensive way to train leadership teams, with more than 25 trainers delivering over 90 different session topics.

Approximately 200 CAAs leverage My Wipfli Membership Service annually, which caters specifically to these programs and provides toolkits, templates and access to consultants.

One example of what a CAA has accomplished in partnering with Wipfli is highlighted here:



EXPERIENCE AUDITING ORGANIZATIONS LIKE PEACE, Inc.

Wipfli's vision is to create lasting, positive impact on every person, organization and community we engage. With over 40 years partnering with the Community Action network, we are proud to say that our commitment to this vision is as strong as ever.

We exist to help you fulfill your vision. And reflecting back on our four decades of partnership provides a glimpse into why our partnership to the networks is strong, resilient and ever-changing.

Decades ago, you didn't have to look far to find information on creating programs and delivering services. Plenty of resources were ready and able to help. CAAs struggled with complying with regulations and running their back-offices. Even when the federal government began creating websites for individual departments, those websites didn't store information on regulations, so it remained challenging to look up the regulations, let alone determine whether you were properly complying with them.

Wipfli filled this need. We quickly became the go-to for CAAs looking to ensure fiscal and regulatory compliance through national training and performing their audit. Our professionals were so knowledgeable and up to date on changing regulations that we started getting recommended by the actual funding sources to audit grant-funded nonprofits. Even national associations started asking our opinion on upcoming legislation and its impact on grant-funded organizations.

Overall, CAAs knew they could rely on us to provide accurate answers to their questions and guidance to help them stay successful and compliant.

Our work with organizations just like yours:

80

Head Starts and CAAs audited annually

5,000

Head Starts and CAA leaders trained each year

500+

Training sessions led by Wipfli over the past 5 years

60+

Head Start and CAA associations trained over the past 3 years

600+

Members of My Wipfli

40+

Years Wipfli has worked with Head Starts and CAAs

EXPERIENCE AUDITING GRANT-FUNDED ORGANIZATIONS LIKE PEACE, Inc.

Prior experience auditing similar county or local government activities

Our firm presently audits or recently has audited counties, cities, school districts, technical colleges, Indian tribes, cooperative education service areas, and other government entities. We have also performed other types of federal audits in a number of state agencies in Wisconsin and other states. In Wisconsin, we have performed audits, pre-funding reviews, and other assignments. We have also provided training sessions to the state agencies in Minnesota, Wisconsin, Illinois, Indiana, and Kansas on specific compliance issues such as the Davis-Bacon requirements. While we do have extensive experience auditing governmental entities, our community action audit partners specifically audit community action agencies and similar grant funded entities in a very high concentration.

Prior experience auditing In-Kind (match) expenditures

Our firm has extensive experience auditing grant-funded nonprofit organizations whose programs include significant in-kind contributions and other matching requirements. Our audit teams routinely work with organizations that must identify, value, document, and report donated goods and services in accordance with Uniform Guidance and other applicable grantor requirements. We understand the unique risks associated with in-kind expenditures, including valuation methodologies, allowability, timing, consistency with grant agreements, and the adequacy of supporting documentation. Through our audits, we evaluate internal controls and compliance processes designed to ensure in-kind contributions are properly supported, accurately recorded, and appropriately reported in the financial statements and grant reports. This experience allows us to efficiently assess compliance while providing practical insights to help organizations strengthen their processes and confidently meet grant matching and reporting obligations.

Prior experience auditing nonprofit, CAP agencies of \$10,000,000 revenue or more

Our firm also brings deep experience auditing large nonprofit Community Action Program (CAP) agencies with complex operations and annual revenues of \$10 million and more. We regularly serve organizations of this size that administer multiple federal, state, and local funding streams, operate across numerous programs and locations, and are subject to extensive compliance, reporting, and matching requirements. Our teams understand the heightened audit risks and expectations that accompany larger CAP agencies, including more sophisticated internal controls, significant in-kind and cost-sharing activity, and increased scrutiny from grantors and oversight bodies. This experience enables us to scale our audit approach appropriately, address complexity efficiently, and provide assurance that financial reporting and compliance obligations are met while supporting the organization's mission and long-term sustainability.

We included references for some of our larger nonprofit CAP agencies in this proposal.

ABOUT US



Wipfli: Holistic solutions to help optimize performance

Wipfli is an advisory firm with a strong CPA foundation that helps our clients navigate the complexities of the modern marketplace by optimizing performance and driving growth. We deliver holistic solutions born of boundless curiosity and a unique perspective to unlock the full potential of every individual and organization we serve.

Our more than 3,200 associates are eternal students, bringing cross-industry experience and creativity to help clients see beyond today's most complex business challenges.

We see organizational success for what it is: a continual process. Nonlinear. But always advancing. Always progressing — from curiosity, to clarity, to results — time and again.

At Wipfli, we believe perspective changes everything.

CLIENT REFERENCES

03

California Human Development

3510 Unocal Place, Suite 200
Santa Rosa, CA 95403

Contact Dan Walker, MBA CPA, Chief Financial Officer
Email daniel.walker@cahumandevlopment.org
Phone 707-523-1155
Services Single Audit, 990
Wipfli contact Mike Webber, Partner

Brightpoint and Subsidiaries

227 E Washington Blvd
Fort Wayne, IN 46802

Contact Kristi Stull, Fiscal Manager
Email Krististull@mybrightpoint.org
Phone 260-423-3546 ext. 227
Services Single Audit, 403(B) plan audit, 990
Wipfli contact Nathan Lipton, Senior Manager

Inter Lakes CAP

P.O. Box 268
111 N. Van Eps Avenue
Madison, SD 57402

Contact Kimberly Raske, CFO
Email Kraske@interlakescap.com
Phone 605-256-6518 ext. 122
Services Single Audit, 403(B) Plan Audit, 990
Wipfli contact Nathan Lipton, Senior Manager

Community Action Partnership of Lancaster and Saunders Counties

210 G Street
Lincoln, NE 68508

Contact Deanna Briley
Email Dbriley@communityactionatwork.org
Phone 402-875-9324
Services Single Audit, 401(k) Plan Audit, 990
Wipfli contact Nathan Lipton, Senior Manager



ABOUT

WIPFLI

Growing since inception

From one man to more than 3,200 professionals — but still one firm.

In the early 1900s, Clarence J. Wipfli & Company was established in Wausau, Wisconsin. Clarence founded the company with a clear vision for bringing his values to his business. Today, more than 3,200 Wipfli team members with an unmatched breadth and depth of expertise are trained to help individuals and business sizes (from small, family-owned companies.

While a lot has changed over the years, the deeply ingrained values passed down from our founders remain an evident part of our business.

Partner involvement in your engagement

Achieving your goals requires an accounting team with more than just considerable industry-specific knowledge; it requires expertise at the highest level. Our partners and executives are hands-on and actively involved in your engagement, lending their wealth of experience and helping ensure you enjoy continuity in our relationship and in the advice and service you receive.

Strategic, proactive and in it for the long term

We look behind the financial numbers to find opportunities that can make you more successful and profitable. Our multidisciplinary approach gives us invaluable insights into how the right decisions

can positively impact your financial performance, long-term growth, organizational development and operational effectiveness — all so your business can expand and reach its utmost potential.

The bench strength to serve you

You'll never need to "train" our people to do their jobs — our auditors, tax professionals and consultants are experienced managers, senior managers and partners. The depth and breadth of our resources can meet your complex needs, and our staff continuity helps minimize disruption to your organization, save you time and money and help ensure consistent service.

Wipfli works to attract and retain the most talented personnel in the industry. We make every effort to help ensure that you work with consistent team members year after year.

The know-how you need, when you need it

When you combine the resources of a large, experienced firm with local and reliable accessibility, you get an ideal business partner, available whenever you need us. As members of a leading tax, audit and business consulting firm, our professionals have developed the profound skills and knowledge you'd expect in a top-performing company. And with local offices, we're also your community neighbors, working by your side to help implement solutions and support your success.

Wipfli today

55,900+

clients

3,100+

associates

294

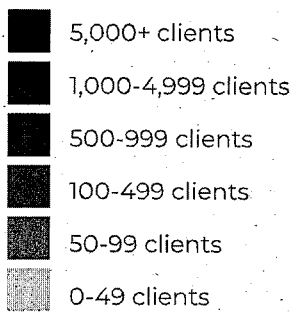
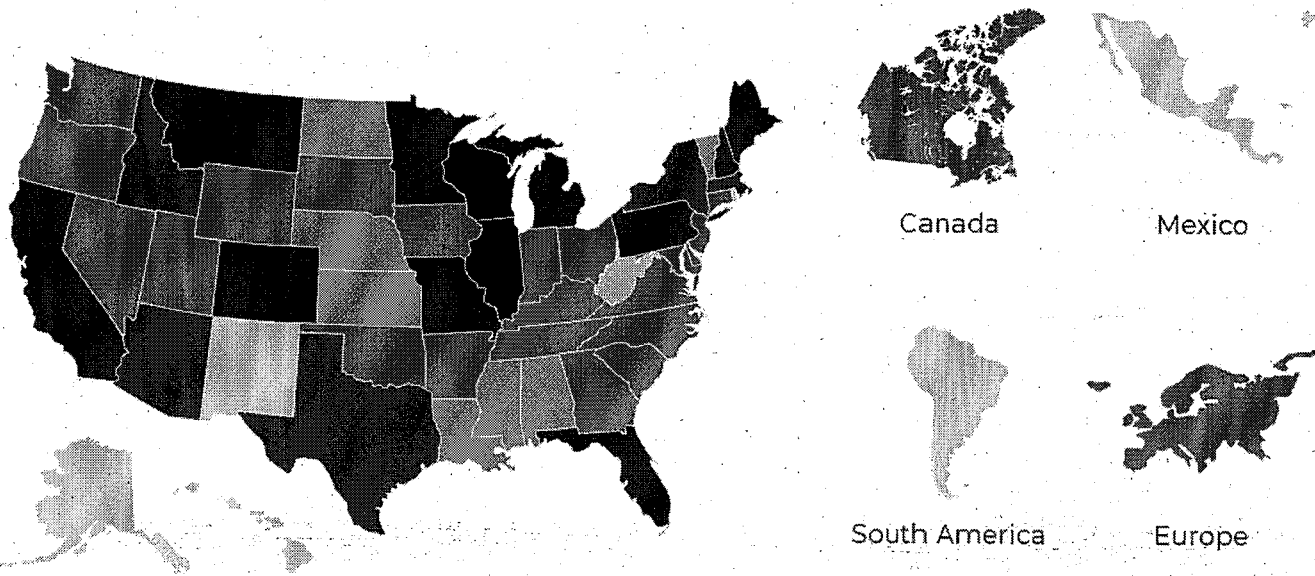
partners

\$590M

revenue in FY24

OUR PRESENCE

Our associates work together as one firm to service our clients.



International advantages

Wipfli's membership in Allinial Global provides us with access to an international network of accountants to service our clients' cross-border needs.

Awards and accolades

Any time we're recognized for our achievements, we're honored and humbled. Like a vote of confidence in the culture we've built, awards reflect the quality of the workforce we attract, the professional excellence we encourage and the Wipfli Way values we proudly follow when serving our clients.

- Accounting Today names Wipfli to Best Firms for Technology
- Accounting Today's Top 25 firms
- Bob Scott names VAR Stars awards
- Best Places to Work Awards

OUR CULTURE

Commitment to the community

We're passionate about making a difference. On our annual Community Day, we close every Wipfli office across the U.S. so that hundreds of our associates and partners can volunteer in their communities. Our annual impact is over 5,400 hours of service to dozens of organizations.

As a longstanding member of a healthy business community, Wipfli also contributes to the growth of local economies and maintains a strong presence in local markets. Our longevity reflects the success that many companies have achieved from working with us, whether it's utilizing our tax and audit solutions or leveraging our consulting services. As with all the clients we serve, your success is our success.

Wipfli's pledge to diversity, equity and inclusion

We believe in a workplace — and a world — where everyone feels included and diversity is embraced. We are respectful of each individual and the unique strengths and contributions each brings. We encourage diversity of thought because we know that the more diverse the voices are, the stronger we are.

We cultivate a culture and environment where our employees can bring their full self to work, and we represent the diversity of the communities we serve, our clients and the country. We are firmly committed to our DEI journey and take pride in what we have achieved so far.

Our associates need to reflect the diversity of our world. To that end, we have revised our recruitment strategy to increase the diversity of experienced hires, student recruits and interns. We've seen a 67% increase in job applicants who self-identify with an underserved group.

To elevate under-represented voices at Wipfli, we have four business resource groups:

Wipfli Pride

Wipfli Pride's vision is to aspire to be the most LGBTQ+ friendly firm in the country, where allyship and belonging is the standard.

Women of Wipfli

Women of Wipfli's purpose is to cultivate an environment where women have an equitable opportunity to achieve their goals and find their version of success.

Wipfli Embrace

The mission of Embrace, Wipfli's alliance to amplify multiculturalism, is to support our current diverse, underrepresented associates and to increase the firm's opportunity to attract, engage, nurture and retain multicultural associates.

Wipfli Valor

The mission of Valor is to support veterans, active military and their families.

At Wipfli, we are respectful of each individual and the unique strengths and contributions everyone brings. Our commitment starts at the top with our managing partner, Kurt Greshens. Kurt has signed the CEO Action for Diversity & Inclusion, joining more than 900 CEOs who have pledged to leverage their individual and collective voices to advance diversity and inclusion in the workplace. Our commitment to a diverse workplace is evident in our initiatives:

- Leadership
- Recruitment
- Unconscious bias education
- inclusion training
- Diverse business resource groups

The Wipfli Foundation

The Wipfli Foundation supports organizations that reflect our mission and that our associates are personally committed to. Through an employee matching program, we support charities with a focus on:

- Education
- Health
- Human services
- Public/societal benefits

Each year, the foundation also supports scholarships, including the Mary T. Wylie Scholarship for women in accounting and the National Association of Black Accountants leadership program.

The foundation was formed in 2005 as part of an effort to give back to colleges and universities. At that time, the funds the foundation donated were primarily used to fund scholarships, purchase textbooks and, occasionally, support universities' capital campaigns and endowed professorships. The program also provides an opportunity for the foundation to match donations from associates and retired partners to universities.

In 2020, the foundation expanded its focus to include a new emphasis on promoting diversity, equity and inclusion through scholarships, leadership programs and campus programs.

In 2021, we refined and expanded the foundation's mission to reflect our commitment to the communities we serve by creating an employee matching program for charitable organizations.

In recognition of urgent needs in our world, the foundation also occasionally offers to match associate donations to causes, such as to India during the height of the pandemic, and to Ukraine charities following the Russian invasion.

MY WIPFLI MEMBERSHIP SERVICE

The My Wipfli Membership Service has numerous consultants available to help you understand the regulations, work through your challenges, and get your questions answered.

My Wipfli Membership Service is an annual subscription that your entire leadership team can leverage. It provides the following benefits:

On-demand knowledge

Our regulations library gives you access to easily searchable documents, including applicable laws, regulations and guidances. You'll find everything you need to understand and apply federal regulations in one place.

Customizable templates

Over 500 customizable policy and procedure templates covering finance, HR, IT and Uniform Guidance regulations. We keep business materials compliant and up to date so you can put them into practice faster.

Valuable toolkits

Get help navigating Davis-Bacon compliance, implementing the new Nonprofit Financial Reporting Standards, onboarding staff and developing relationships with your community to raise funds.

Fast and accurate answers

Learn the latest updates in the What's New section. Members can also ask Wipfli professionals about regulations, audits, processes, HR, technology, finance, tax and leadership. Give us your toughest question and get an answer you can trust from an experienced professional.

Easy access

My Wipfli members get 24/7 access to important information and resources and are among the first to learn about new training, tools and services.

More for less

The membership includes access for you and your leadership team for one flat fee.

My Wipfli members can get answers on:

- Regulations
- Policies and procedures
- Internal controls
- Human resources
- Head Start/ Early Head Start
- Community Action
- Technology
- Fund development
- Leadership
- And more

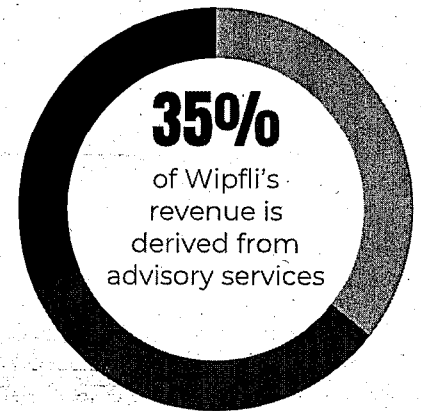


THE PERSPECTIVE TO UNLOCK YOUR POTENTIAL

At Wipfli, our continuous curiosity drives solutions that strengthen impact and sustainability for mission-driven organizations. With more than 3,000 professionals serving nonprofits of all sizes, we help your team amplify outcomes with:

- Greater funding visibility and financial sustainability
- Stronger donor and grant reporting processes
- Streamlined compliance and audit readiness
- Increased efficiency in service delivery
- More effective use of people, processes, and platforms
- Energized culture and talent retention in resource-constrained environments
- Enhanced board confidence and governance practices
- Improved impact measurement and storytelling
- A renewed sense of purpose and mission alignment

Service breakdown



■ Advisory ■ Audit ■ Tax

A one-stop shop to help validate, protect and grow your business

Digital

Unlock the real impact of technology to achieve deeper engagements, enhanced efficiencies, secure systems and actionable data.

Outsourcing

Stay lean and scale smart with traditional and innovative C-suite outsourcing solutions.

Organizational performance

Align and elevate your strategy, operations and people to thrive in a fast-paced, dynamic marketplace.

Risk advisory

Manage your risk, protect against threats and stay compliant while enhancing the value and resiliency of your organization.

Assurance

Get tailored audit, assurance and accounting solutions — and actionable insights — crafted specifically for your industry.

Tax

Minimize your tax exposure and maximize your cash flow on an international, national, state or local level.

M&A transaction advisory

Maximize value at every stage of your M&A deal with proactive pre-transaction strategies and post-transaction integration.

Private client services

Cut through the complexities of personal and business finances to achieve your financial goals.

ENGAGEMENT TEAM



“It takes creativity to come up with the best solutions for our needs. When I present a need or an idea to Wipfli, they ask the right questions to formulate the right features and integrate them quickly. The team always delivers.”

Rebecca Liu, Ph.D, Director of Grants Administration for The Mark Foundation for Cancer Research

Solving your challenges means getting access to a skilled team — trusted advocates who listen to your concerns and provide the support, advice and strategies you need to succeed.

Our commitment to staff continuity reflects our understanding that team members who feel fulfilled in their work and are provided with the resources they need to grow and thrive are professionals who remain at Wipfli throughout their careers.

In most cases, you'll work with experienced professionals with **10+ years of experience**. Consistent, cohesive and dedicated, our team provides you with an expected experience year after year.



Mike Webber, CPA

Partner

Mike Webber, a Partner in our NGP group, will be in charge of this engagement. He has worked on over 150 audits and currently manages about 25 clients. His experience as an assurance specialist includes service to several different nonprofit organizations, community action programs, Head Start organizations, work force investment boards, associations, foundations, and community-based nonprofit organizations. Mike appreciates that most of his clients exist to help people in need, and he enjoys helping them accomplish that goal. He strives to ensure that his clients are great stewards of the funding they receive. Mike received his accounting and risk



Nathan Lipton, CPA

Senior Manager

Nathan Lipton, a senior manager in our NGE group. His nearly 10 years of audit experience as an assurance specialist includes services to various nonprofit organizations including community action programs, Head Start organizations, workforce investment boards, as well as auditing low-income housing partnerships. He also specializes in audits of employee benefit plans. Nathan enjoys working with his clients in creating efficiencies, allowing organizations to continue working towards accomplishing their goals. Nathan received his Master of Professional Accountancy from the University of Wisconsin-Whitewater. He has been with the firm since 2015.



Kalinda Bang, CPA

Manager

Kalinda Bang is an experienced audit manager with over a decade of expertise in public accounting. She leads engagements across audits, reviews, and compilations, with a specialized focus on nonprofit organizations. Kalinda is known for her hands-on approach to client service, her deep understanding of nonprofit financial reporting requirements, and her commitment to delivering high-quality, timely assurance services.



Jorge Estrada

Business Development Leader

Jorge Estrada leads growth for Wipfli's nonprofit human services team, helping organizations strengthen operations and amplify impact. Based in Rhode Island but serving nationally, he delivers tailored solutions across audit, technology and consulting to advance change where it is needed.

YOUR ENGAGEMENT TEAM



Scott Walsh
Senior Accountant

Scott Walsh is a senior accountant in the firm's NGE group, bringing more than three years of public accounting audit experience. His work includes serving nonprofit organizations such as community action programs, Head Start organizations, and low-income housing partnerships, along with specialized experience in employee benefit plan audits.



Quinn Dugan
Manager

Quinn Dugan is a tax manager specializing in tax-exempt organizations. He works closely with clients to ensure accurate tax reporting that complies with the Internal Revenue Code applicable to tax-exempt organizations. Clients appreciate Quinn's attention to detail and commitment to high quality service.

Through deeply invested relationships and boundless curiosity, Wipfli brings clarity that drives results.

PROPOSED SERVICES



“Wipfli did a lot of customization for us and really went the extra mile. They wanted to make sure we were going to be successful.”

Deb Taylor, CEO at Senior Community Services

We provide you with high-quality services and share highly valuable insights that go well beyond reports to help improve your decision-making and build on your success. Below are the hallmarks of our audit approach.

Ongoing communication

We understand that your staff has a lot to do. Preparing for the audit and working with your auditors can add a layer to already full workloads. We will work closely with your team to provide information requests with plenty of time to compile the information needed for us to do our work. We will also provide information requests for the Form 990 preparation.

Hands-on executives

Work with a firm whose leaders take an active role in your engagement. Wipfli's partners and managers tend to be more hands-on than executives at national firms. They work closely with staff throughout the audit process to ensure all issues are identified and resolved, take an active role in auditing key account balances and spend a significant portion of their time onsite.

Use of technology

Technology greatly impacts the audit world, making the process faster and more precise. But it can make an even bigger difference in providing a more efficient audit that offers deeper insight into your business. Wipfli is continually investing in technology to innovate and ensure we're delivering powerful data and solving our clients' biggest challenges.

Onsite visits

The majority of our audit procedures will be performed on-site to support effective collaboration with staff and timely completion of testing. Certain procedures may be performed remotely, as appropriate, to increase efficiency and minimize disruption. We anticipate using a primarily on-site, hybrid approach for PEACE, Inc., with limited remote work incorporated where it adds value. We will work collaboratively with management to determine the most effective audit strategy based on your operational needs and preferences.

Services

- Single Audit

Audit delivery schedule

Once our quality control has been completed, we will transmit a digital copy of the draft financial and compliance audit (report to PEACE, Inc. in May 2027). Wipfli will present the final audit report to the board of directors as requested.

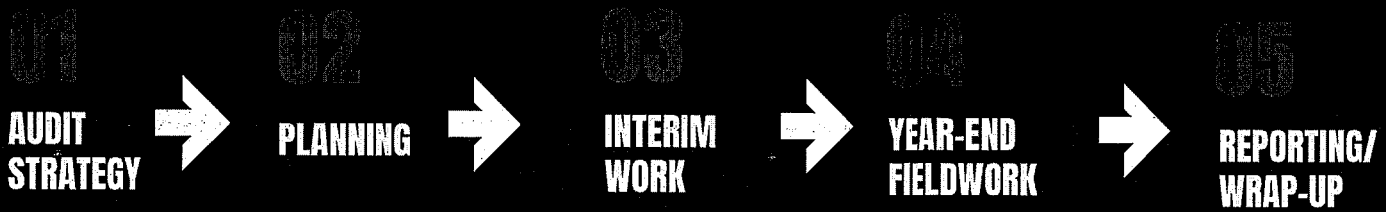
Wipfli will complete the Forms 990 at least one (1) week prior to the due date in June 2027 for proper review by PEACE, Inc.'s staff.

Engagement timetable

Below you'll find the estimated timetable for each step of the engagement. The schedule is planned around your specific requirements and to meet your deadlines, but it can be adjusted based on input from the audit committee or finance team.

Engagement steps	Dec / Jan	Apr	May
Audit strategy	X		
Planning & Interim	X		
Year-end fieldwork		X	
Reporting and wrap-up			X

AUDIT APPROACH



STEP 1: AUDIT STRATEGY

We will develop a comprehensive audit strategy for PEACE, Inc. Our audit strategy will encompass the following:

- Comprehensive understanding of the entity and its environment: We will obtain a comprehensive understanding of PEACE, Inc. Our discussions will include policies and procedures and areas of concern that management has, as well as changes in operations and funding.
- Assessment of risk of misstatement: We will review the nature of prior audit adjustments, management letter recommendations, and our initial assessment of the effectiveness of controls to assess financial statement and other risks.

STEP 2: PLANNING

During the preliminary phase of the audit, we will request a meeting with the management team to help ensure we clearly understand their preferred communication style and their expectations of Wipfli as PEACE, Inc.'s independent auditors.

The Wipfli audit team will also discuss recent activities with management that will impact financial accounting and reporting. We want to identify any significant accounting issues early and develop with management an approach to resolving them.

We will work closely with management to help ensure that the year-end financial close process proceeds smoothly and on time.

During the planning phase, we will discuss the timing for audit fieldwork, the schedules, and the records to be provided by PEACE, Inc.'s staff. We will also perform initial risk assessments for the overall engagement.

STEP 3: INTERIM WORK

An entrance conference will be held during the interim work phase of the audit.

During this phase, we will document our understanding of the organization and structure; document and test the key internal control processes; document and test significant fraud risk areas; complete testing of 2 CFR Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, and if time permits begin the audit testing of significant audit balances.

An outline of the tasks performed to achieve the audit objectives is as follows:

AUDIT APPROACH

An outline of the tasks performed to achieve the audit objectives is as follows:

Understanding of your organization and structure:

- Utilization of your fiscal policies and procedures manual
- Updating the data gathering forms related to the overall entity
- Interviews with key management and Board of Directors
- Document results in audit file

Key internal control processes:

- Identify key internal control processes
- Test most common processes tested are cash receipts, cash disbursements, payroll, and grants
- Update data gathering forms for each key activity
- Interviews key personnel related to each key activity
- Identify and test key controls within each activity
- Test a random sample of cash disbursement and payroll transactions

Fraud risk areas:

- Identify potential fraud risk areas within community action agencies are credit cards and expense reimbursements
- Interview key personnel to identify potential for other fraud risk areas
- Design tests to obtain a comfort level that potential fraud risks have been minimized

Compliance testing of major federal programs:

- Identify the major federal programs to be tested.
- Use the most recent Compliance Supplement in testing each major program.
- Review each grant for any special audit testing that may need to be performed.

- Test each program for compliance with the specific compliance requirements identified within the Compliance Supplement.
- Interview program directors and other key personnel are conducted to obtain a thorough understanding of the organization.
- Depending on the program, obtain participant lists prior to fieldwork and selections are made for testing.
- Testing of sample transactions specific to the program are also tested in conjunction with the compliance testing.

STEP 4: YEAR-END FIELDWORK

The fieldwork will be conducted to meet generally accepted auditing standards and Government Auditing Standards. To meet these requirements, we will perform audit procedures to include:

Substantive and compliance tests of the financial statements, both the Statement of Financial Position and the Statement of Activities, of the entity taken as a whole. We will perform substantive procedures on all material areas of both the Statement of Financial Position and Statement of Activities. The types of testing will depend on the risk assessment of each area.

Fieldwork encompasses numerous procedures, including testing account balances, reviewing minutes, analyzing grants, and reviewing financial statement supporting documents.

Additional tests as required to satisfy the requirements of generally accepted auditing standards, the terms and conditions of the grant awards, and the State of New York. Specific audit procedures we perform each year will vary, and some will be unpredictable.

STEP 5: REPORTING AND WRAP-UP

At the conclusion of fieldwork, we will conduct an exit conference with PEACE, Inc.'s representatives to discuss observations and recommendations (which will also be summarized in writing) including internal control and program compliance observations and recommendations.

AUDIT APPROACH

During this phase of the engagement, the entire audit file including financial statements and tax return will go through our quality control review. Our quality control review includes a full audit file review by the engagement manager and partner. A third and final quality control review of the financial statements, tax return, and significant audit areas will be completed by the concurring partner.

Use of subcontractors or contract employees

Wipfli does not use subcontractors or contract employees in our audit or tax engagements.

Resolution of technical disagreements

Differences of opinion arising during an assurance engagement, either between engagement team members or with PEACE, Inc. shall be identified and resolved promptly. We encourage open lines of communication between team members and between Wipfli and PEACE, Inc. The nature and scope of the difference of opinion, and resulting conclusions, as agreed upon by the team and PEACE, Inc., are to be documented and implemented. An assurance engagement report is not dated until all differences of opinion have been resolved.

Assistance required from your staff and use of affiliates

We understand that your staff has a lot to do. Preparing for the audit and working with your auditors can add a layer to already full workloads. We will work closely with your team to provide information requests with plenty of time to compile the information needed to do our work. We will also provide information requests for the Form 990 preparation.

“Wipfli has been such a great resource. Anytime I’ve had a question or idea, they’ve been a great sounding board for us. They are truly invested in our success.”

Alison Rumler-Gomez, CEO at Community Action Partnership of Central Illinois (CAPCIL)

PROPOSED SERVICES: 401K AUDIT

Each year, Wipfli conducts over 700 employee benefit plan audits, with as few as 100 or as many as 50,000 participants and several billion dollars in assets.

We understand the complexity of the requirements and can help you maintain compliance and adhere to your fiduciary responsibilities.

How we can help

Wipfli provides many services for qualified employee benefit plans. We have a separate group that serves as the plan administrator and record keeper for hundreds of employee benefit plans, which are non-audit clients. In addition, we prepare Form 5500s for hundreds of defined contribution, defined benefit and health and welfare plans.

Our Employee Benefit Plan practice is an integral part of our firm's service offering. We have expertise in retirement and welfare plan audits, administration, compliance, design, and consulting. Because most of our clients have employee benefit plans which comprise a substantial part of their total compensation package, they demand expertise from their most trusted business advisor, Wipfli.

We are committed to investing significantly in the education of our associates to stay abreast of law changes in the employee benefits arena so we can provide the value that our clients expect from us. Our experience as auditors, administrators, and benefit consultants makes us uniquely qualified to efficiently and expertly provide benefit plan audit services to PEACE, Inc.

In addition, Wipfli was one of the first firms in the country to become a member of the American Institute of Certified Public Accountants (AICPA) Employee Benefit Plan Audit Quality Center (the "Center"), which is focused on promoting quality in employee benefit plan audits. The Center is a valuable resource for obtaining up-to-the-minute developments concerning benefit plan audits.

Standard engagement approach

Wipfli's approach to providing these benefit plan audit services is focused on concentrating a select number of qualified professionals in providing the services. We consider it absolutely imperative that all employees participating in these audits be dedicated to providing the highest quality auditing services



AUDIT APPROACH AND ROADMAP - 401K Audit

Wipfli's audit process includes the following phases for the 401k audit:

Phase 1: Audit strategy

During this phase, the audit team assesses risks to identify areas where the financial statements may be misstated and where noncompliance is likely based on information from the new client transition phase. The team discusses audit risks and procedures, assigning staff to sections based on their knowledge and experience. Preparation lists for audit and tax work, along with various workpapers and templates, will be uploaded to the portal during this phase.

Phase 2: Planning

During this phase, the audit team prepares the audit programs and designs the procedures that have been determined necessary in response to the risks that were identified during the audit strategy phase. Certain procedures, analyses, and inquiries that can be performed remotely are performed during this phase to prepare the audit team for fieldwork and identify areas where the audit program may need to be modified due to new information and understandings gained during this phase.

Phase 3: Year-end fieldwork

Our audit team will be performing year-end fieldwork remotely. Effective audit fieldwork relies on clients providing requested information one week before fieldwork begins. During fieldwork, we maintain ongoing discussions with management to resolve inquiries and requests promptly. We aim to complete fieldwork within one week and hold an exit conference before the end of the week to discuss preliminary findings and the status of any open items.

Phase 4: Wrap-up/reporting

Report drafting and wrap-up procedures often start during fieldwork when the audit goes as planned. The process includes a detailed review of audit procedures, findings, and reports by the senior manager, followed by a partner review. Finally, an independent partner reviews the audit report for quality control and adherence to auditing and financial reporting standards.

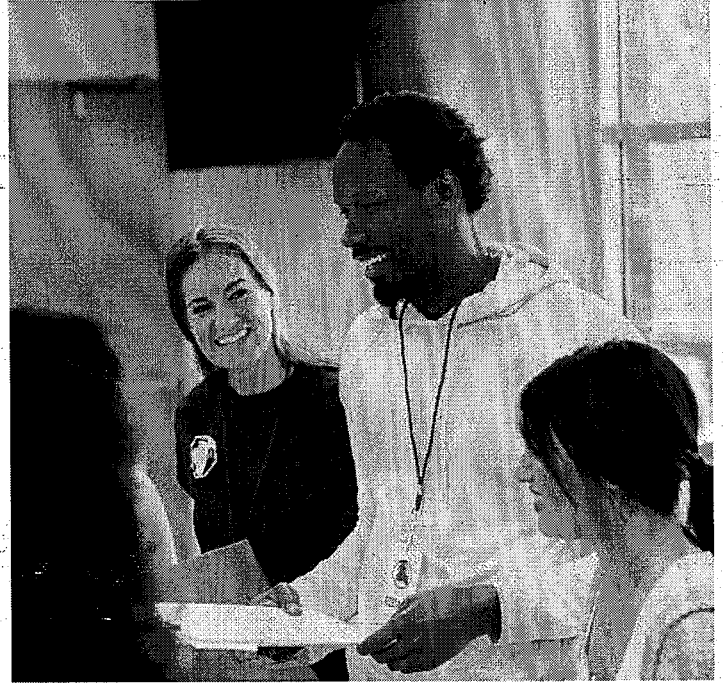
Engagement steps	April	May	June	July
Audit strategy	X			
Planning		X		
Year-end fieldwork			X	
Reporting and wrap-up				X

For many organizations, the transition to a new auditor can be stressful. But your transition can be a smooth one — and that's our main goal.

The Wipfli team meets with you in advance to develop our audit strategy and choose an approach that tackles the risks we discover.

We also work with your previous auditors to examine prior-year working papers so that we can understand their audit approach and the timing of their procedures. This helps us determine if any additional procedures are performed on opening balances of your financial statements.

Overall, by aligning our organizations and setting expectations, we can move forward with an approach that meets your needs with minimal disruption.



Transition management

Align both organizations

Procedures
Personalities
Strategy

Set expectations

Specific needs and special circumstances
Timing and communications
Deliverables

Move ahead

Holistic approach
Collaboration and trust
Day-to-day relationships

On behalf of the Offeror:

1. The individual signing certifies that he/she is authorized to contract on behalf of the Offeror.
2. The individual signing certifies that the Offeror is not involved in any agreement to pay money or other consideration for the execution of this agreement, other than to an employee of the Offeror.
3. The individual signing certifies that the prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition.
4. The individual signing certifies that the prices quoted in this proposal have not been knowingly disclosed by the Offeror prior to an award to any other Offeror or potential Offeror.
5. The individual signing certifies that there has been no attempt by the Offeror to discourage any potential Offeror from submitting a proposal.
6. The individual signing certifies that the Offeror is a properly licensed certified public accountant, or a public accountant licensed on or before February 1, 2026.
7. The individual signing certifies that the Offeror meets the independence standards of the *Government Auditing Standards*.
8. The individual signing certifies that he/she is aware of and will comply with the GAO Continuing Education Requirement of 80 hours of continuing education every two years; and that 24 hours of the 80 hours education will be in subjects directly related to the government environment and to government auditing for individuals.
9. The individual signing certifies that he/she is aware of and will comply with the GAO requirement of an external quality control (peer) review at least once every three years.
10. The individual signing certifies that he/she has read and understands the following publications relative to the proposed audits:
 - a. Government Auditing Standards (Yellow Book)
 - b. Title 2 U.S. code of Federal Regulations-Part 200, Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards ("Uniform Guidance")
 - c. Audits for Not-for-Profit Entities (AICPA Audit Guide)
 - d. Audits of State and Local Governments (AICPA Audit Guide)
 - e. New York State division of Housing and Community Renewal and New York State Housing Trust Fund corporation "Audit Guide".

Any other standards and guidelines for our grants and funding sources.

11. The individual signing certifies that he/she has read and understands all of the information in this Request for Proposal, including the information on the programs/grants/contracts to be audited.

CERTIFICATIONS

12. The individual signing certifies that the Offeror, and any individuals to be assigned to the audits, does not have a record of substandard audit work and has not been debarred or suspended from doing work with any federal, state or local government. (If the Offeror or any individual to be assigned to the audits has been found in violation of any state or AICPA professional standards, this information must be disclosed.)

Dated this 3rd day of April, 2026.

Wipfli LLP

(Offeror's Firm Name)

Mike Webber

(Signature of Offeror's Representative)

Mike Webber, Partner

(Printed Name and Title of Individual Signing)

Report on the Firm's System of Quality Control

November 12, 2025

To the Partners of Wipfli LLP and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Wipfli LLP (the firm) applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended June 30, 2025. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a system review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported on in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under the Single Audit Act; audits of employee benefit plans; audits performed under FDICIA; and examinations of service organizations (SOC 1[®] and SOC 2[®] engagements).

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Wipfli LLP applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended June 30, 2025, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)*, or *fail*. Wipfli LLP has received a peer review rating of *pass*.

Weaver and Tidwell, L.L.P.

WEAVER & TIDWELL, L.L.P.

San Antonio, Texas
November 12, 2025



December 11, 2025

Kurt Gresens
Wipfli LLP
10000 W Innovation Dr Ste 250
Milwaukee, WI 53226

Dear Kurt Gresens:

It is my pleasure to notify you that on December 11, 2025, the National Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is December 31, 2028. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,

A handwritten signature in black ink, appearing to read "Liz Gantnier".

Liz Gantnier
Chair, National PRC

+1.919.402.4502

cc: Brett Siegfried, Stephanie Cavadeas

Firm Number: 900010077210

Review Number: 616073

CONTACT INFORMATION

Jorge Estrada

Business Dev Representative

Jorge.Estrada@wipfli.com

414.259.6739

Mike Webber

Partner

mwebber@wipfli.com

608.270.2994

WIPFLI

'Wipfli' is the brand name under which Wipfli LLP and Wipfli Advisory LLC and its respective subsidiary entities provide professional services. Wipfli LLP and Wipfli Advisory LLC (and its respective subsidiary entities) practice in an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations, and professional standards. Wipfli LLP is a licensed independent CPA firm that provides attest services to its clients, and Wipfli Advisory LLC provides tax and business consulting services to its clients. Wipfli Advisory LLC and its subsidiary entities are not licensed CPA firms.

