

Insero Receives Strategic Investment from Rallyday Partners to Accelerate Growth and Expand Services

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[Insero Advisors](#), LLC ("Insero"), a leading provider of accounting, tax, and services, today announced it has received a strategic investment from [Rallyday Partners](#), a move designed to

accelerate the firm's growth and expand its service offerings to meet the evolving needs of its clients.



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Ryan Heckman, Co-Founder & Managing Partner of Rallyday Partners

Insero has built a reputation for delivering exceptional service and innovative solutions tailored to the unique needs of businesses and individuals. With this investment, Insero plans to enhance its advisory services, integrate advanced technologies into its operations, double down on its 'people first' culture, and broaden its reach across new regions. This strategic investment underscores Insero's unwavering commitment to delivering “The Highest Standard” of service and strengthening its position as a trusted partner for clients locally, nationally, and internationally.

"Insero has always been committed to helping our clients succeed by providing solutions that address their unique challenges and opportunities," said Nancy Catarisano, CEO of Insero. "We are excited for this next step as we lead the reinvention of the public accounting and consulting industries at a national level. This partnership with Rallyday is going to enable us to get to this vision faster and smarter, and we could not be more thrilled."

The accounting and consulting landscape has seen increasing demand for technology-driven solutions in areas such as financial planning, tax strategy, and operational efficiency. Insero is dedicated to staying at the forefront of the industry by investing in digital transformation and expanding its advisory capabilities to help clients navigate this rapidly changing environment.

Beyond enhancing client services, Insero plans to continue its investment in its people. Already an award-winning employer, the firm is committed to fostering a culture of growth and development, offering employees opportunities to learn, innovate, and contribute to impactful projects with a great sense of purpose.

Ryan Heckman, Co-Founder and Managing Partner with Rallyday, shared, “We are honored and inspired to partner with Nancy and the team at Insero as they redefine what it means to be a modern accounting firm. Their clients consistently praise the firm’s

ability to deliver exceptional results through a unique blend of technical expertise, operational savvy, and unwavering integrity. Insero’s commitment to innovation and personalized service truly sets them apart in the accounting and advisory space. They also share our dedication to the human side of business—prioritizing both employee development and meaningful client relationships—which makes this partnership even more compelling for Rallyday.”

Insero’s strategy will include partnering with other like-minded public accounting, advisory and professional services firms, adding more service lines that empower its clients’ ultimate success and providing a fulfilling platform for experienced professionals that seek a powerful new chapter in their lives. Following the closing of the transaction, Insero will operate an alternative practice structure in which Insero & Co. CPAs, LLP, a licensed CPA firm, will provide attest services, and Insero Advisors, LLC, will provide business advisory, tax, and other non-attest services. Under this new structure, partners and professionals will continue to deliver integrated and seamless client experiences.

Insero will be using the new capital to grow thoughtfully and in service to its clients’ evolving needs and differentiated client experience. Intrigued? Learn more [here](#) about what makes Insero a great place to work.

About Insero

Insero is a Rochester-based accounting and advisory firm with a unique focus on people. Insero’s purpose is to make a difference in people’s lives, including employees, clients, and community members. This focus, along with valuing success, integrity, accountability and innovation, is how Insero redefines the experience of working with an accounting firm beyond industry standards. More information regarding Insero is available at www.inseroadvisors.com.



Insero Team

About Rallyday Partners

Rallyday Partners is a Denver-based private equity firm that was built by successful entrepreneurs to provide a better way of serving and partnering with emerging companies and their leaders. Rallyday's purpose is to empower leaders to go even bigger, create the most value for the most amount of people, and share in the experience of a lifetime. Drawing upon its four sources of capital – creative, financial, experiential, and human capital – the firm's 'by founders for founders' strategy provides an alternative to traditional private equity for those that want to go even further, elevate entire industries, and have an experience of a lifetime together. More information regarding Rallyday is available at www.rallydaypartners.com.

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