

Aprio CEO: Culture and Capital Fuel Firms Rapid Growth

Private equity doesn't have to strip your culture.

NEW YORK CITY, NY, UNITED STATES, June 11, 2025 /EINPresswire.com/ -- In a recent episode of [Gear Up For Growth](#), powered by [CPA Trendlines](#),

Aprio Advisory Group CEO [Richard Kopelman, CPA, CGMA](#), shares insights with host Jean Caragher, president of Capstone Marketing, into the firm's meteoric rise and bold vision for the future, crediting two foundational drivers: an unwavering commitment to culture and a strategic private equity partnership.

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*Richard Kopelman, CPA,
CGMA*

Under Kopelman's leadership since 2013, Aprio has grown into the 24th largest accounting firm in the U.S., driven by a unique culture built around “31 Fundamentals” that guide daily behavior and decision-making. “Our culture is not a poster on a wall,” Kopelman says. “It's how we operate—how we communicate with each other, serve clients, and make decisions. We practice it every day.”

This deeply embedded culture has not only fueled organic growth but has made Aprio a destination firm for top

talent, landing the firm on Glassdoor and USA Today's best places to work lists.

In 2024, Aprio took a bold step by securing investment from Charlesbank Capital Partners to accelerate its long-term strategy. “We saw significant shifts in technology and client expectations and wanted to move faster,” Kopelman explains. “The partnership allows us to scale our people, technology, and M&A strategy while remaining true to our identity as a partner-owned, entrepreneurial firm.”

Aprio now boasts over 850 equity holders within the firm—far beyond the traditional partner model—demonstrating its commitment to building a future where more professionals share in the firm's success.

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"Our goal is to create opportunities—financial independence for our people, expanded services for clients, and a business advisory model that redefines what a modern accounting firm can be," Kopelman concludes.

Other highlights include:

- Aprio is moving beyond traditional accounting, adding services like legal (via the acquisition of Radix Law), cybersecurity, staffing, and wealth management.
- Private equity capital is being used for M&A, technology, and lateral partner hiring, with a focus on maintaining partnership and equity culture.
- Kopelman identifies his key leadership strengths as energy, positivity, and a relentless focus on opportunity creation for staff and clients.
- A central tenet of Aprio's success has been to "just ask the client" and evolve services based on client needs—emphasizing relationship over transaction.
- Hundreds of Aprio professionals have been trained in value-based pricing to modernize client billing, influenced by Michelle River's advanced pricing methodology.

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ABOUT US

CPA Trendlines is the online home of the freshest research and analysis in the tax, accounting, and finance professions. Here, you'll find the data and analysis you can use for your practice and your career, plus exclusive research, insights, and commentary on the most pressing issues and fastest-changing trends.

Rick Telberg is a veteran analyst, advisor, commentator, editor, and publisher. He brings a unique background and perspective to research and advisory services for the professional services community. Rick may well be the accounting profession's most widely recognized commentator, thanks to his long-standing associations with the American Institute of Certified Public Accountants, Accounting Today magazine, and now CPA Trendlines.



Richard Kopelman, CPA, CGMA, Aprio's CEO dishes on how his firm skyrocketed into the 24th largest firm in the U.S.

At Capstone Marketing (<https://capstonemarketing.com>), Jean Caragher gets things done. With over 35 years of experience working solely with CPAs, Jean knows the challenges and opportunities firms face today. Her experience and knowledge, combined with her practical approach, help growth-focused CPA firms attract the best clients and talent. A well-respected industry specialist, Jean is an inaugural AAM Hall of Fame inductee, a multiple AAM-MAA award winner, and a CPA Practice Advisor Thought Leader. She has been named twice to Accounting Today's 100 Most Influential People in Accounting.



With over 35 years of experience working solely with CPAs, Jean Caragher, president of Capstone Marketing, knows the challenges and opportunities firms face today.

Gear Up for Growth is a show tailored specifically for public accounting firms with up to 100 team members looking to expand their practices intelligently and efficiently. Hosted by Jean

Caragher of Capstone Marketing and powered by Rick Telberg of CPA Trendlines, each episode focuses on a topic crucial for accounting firms aiming for smart growth in today's competitive landscape. Listeners can expect insightful discussions with guests and panelists covering a range of subjects, including marketing and business development, client service and satisfaction, talent recruitment and retention, creating a great workplace, building a learning organization, strategy and execution, and leadership. The show aims to provide actionable insights and practical advice that accounting firm leaders can implement for smart, strategic growth.

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