

## FAQ About Our Merger

We are pleased to announce that Berger, Gherisi & LaDuke PLC has joined Yeo & Yeo CPAs & Advisors, effective July 1, 2024. Combining with Yeo & Yeo represents an opportunity for us to enhance the value we provide to our clients and our staff. We are excited about the possibilities it holds for our future together.

### Will BGL's name change?

Yes. BGL is now Yeo & Yeo CPAs & Advisors, as of July 1, 2024. While the name may change, our dedication and service to you remains unwavering.

### Will there be staff changes?

Your primary contacts and the team you have worked with at BGL will not change. The same people you have come to know and trust will continue to serve you.

### Will contact information change?

Phone and fax numbers will stay the same. We have new Yeo & Yeo email addresses that follow this convention:

firstname.lastname@yeoandyeo.com.

For your convenience, we will keep our BGL email addresses for a minimum of 18 months, and they will seamlessly be directed to one inbox, no matter which email address you use.

### Why did you merge?

For over 40 years, BGL has enjoyed great success and growth. As the accounting industry changes and client needs evolve, and as we look at our long-term plans and opportunities, we believe this merger will add significant value to our clients, our people, and our communities.

### Will there be procedural changes?

For the most part, service will be uninterrupted. Each client at the time of your engagement will have to sign an annual engagement letter, but will now be under Yeo & Yeo's name. In the coming months, we will consolidate software systems, workflows, portals, and payment methods that will lead to greater efficiency and ease. We will inform you in advance of any minor procedural changes that may affect you.

### Can I continue to access my Client Portal?

Yes. For clients using the portal to store, retrieve and send documents, you can continue to access the portal with your current login. We will be working to transition portals over the next few months and will notify you when that change takes place. Unless communicated to you otherwise, you will have until 12/31/2024 to retrieve any data posted in the portal that you may want to retain for your records.

### Where can I learn more about Yeo & Yeo?

Yeo & Yeo has a tremendous reputation as a Michigan-based firm with over 100 years of dedicated client service. As a mid-size firm, they have a diversified service portfolio to support their clients' growing needs while upholding their culture of delivering personalized service with the utmost integrity and maintaining a strong local presence.

**Visit [yeoandyeo.com](https://yeoandyeo.com) to learn more.**