

**IMPORTANT NEWS REGARDING FIRM MERGER**

September 3, 2024

Dear Client and Colleague:

Over the past 15 years, my family and I have endured a few battles. Some of those battles have been health related, several business related, and some have been very personal. But all of them have forced us to reflect on where we have come from and where we want to be when the next chapter in our lives is written.

To ensure that the preservation and care of our firm and clients is intact, no matter where we find ourselves in the distant future, it was necessary for us to find a new partner in the accounting industry. A new partner with a business plan aligned with ours. A partnership founded on the same mission and values. After a long search, we found that partner.

Beginning in November, Crace.CPA will be known as:



**Padgett**

Since their founding in 1965, Padgett Business Advisors has been a nationwide leader in the tax and accounting industry. Rex Rudolph and his team of CPAs and accountants out of Traverse City, Michigan have given me a new lease on our profession and a promise to carry on the same spirited service we have always provided.

In the distant future, I will be stepping back in my role as your tax and accounting professional. As much as I dread the day that we must part, I am convinced that Rex will take the helm and steer the ship that Angie and I have worked so hard to build over the last 13 years. But for the foreseeable future, Ben, Angie and I will continue to operate under our new umbrella and continue to provide you with the best service we know. With the added resources of Padgett, the ways in which we can assist you or your business will only expand.

In the upcoming months, you will have several opportunities to meet the new owner and his management team at a planned open house, by scheduling a meeting in our office, or via a scheduled Teams meeting. He is just as excited as I am about the transition and future of our relationship, so don't hesitate to reach out and schedule an introduction.

While I understand that change can be a bit mysterious, even unnerving, I assure you that the transition from Crace.CPA to Padgett Business Advisors will be smooth and almost unnoticeable. With so many common practices, platforms, and philosophies the only change you will notice is the logo on our communications and website. If you have any concerns about how your account will be handled, feel free to contact me directly and we can discuss it at length.

I apologize for the surprise and any uncertainty this may cause. My only request is that you grant us some understanding of what we are going through; dealing with our personal and health issues and selling something we worked so hard to build. Please give Rex and his team the opportunity to serve you and your professional needs. I deeply appreciate the relationship we have had over the years, and I hope we can remain friends as the transition carries on.

Thank you and God Bless,

Regards,

Crace CPA, LLC

A stylized, handwritten signature in black ink, appearing to be 'JL Crace'.

Jason L. Crace, CPA

A handwritten signature in black ink that reads 'Angela L. Crace'.

Angela L. Crace