

Speaking Topics:

Joseph DeMarco, CPA, Founder & Owner of Elevate CPA Group

Common Advisory Fee Billing Mistakes

The Securities and Exchange Commission (SEC) has long paid attention to what RIA firms are charging their clients. The SEC reviews advisory fee billings and other business practices to root out inaccuracies. Reviewing your RIA firm's advisory fee billings for mistakes is a complicated but necessary process to be compliant with the SEC and ensure you aren't over or undercharging your clients. In this presentation, Joe will outline:

- What the SEC requires of your RIA firm
- Two evils: overcharging and undercharging
- Calculation errors: from simple to complicated tiered fees
- Best practice fee reviews

Elevate Your RIA Firm Transition Process

Buying or selling an RIA firm is a complicated, stressful and exciting process! The fine details of a successful RIA purchase or sale go well beyond dollars and cents. Elevate CPA Group has helped several RIA firms successfully complete the process. In this presentation, the Elevate team steers you clear of pitfalls and towards success! The presentation includes:

What You Need to Know About Preparing to Sell Your RIA Firm

- Setting expectations
- Keeping top talent
- Business valuation

What You Need to Know About Preparing to Buy an RIA Firm

- Setting expectations
- Know your numbers
- Highest and best use of you

The Secret Sauce: How to Successfully Grow Your RIA Firm from Industry Experts

There is a reason you get your eyes checked by an eye doctor and not a dentist. It's the same reason that you trust industry experts with your RIA firms financials, tax planning, KPI setting and more – they know what they are doing! In this presentation, Elevate CPA Group provides a series of case studies to illustrate how they have taken RIA firms hunger for growth and turned it into clear actionable steps that lead to success.



Joseph DeMarco, CPA

Founder and Owner

Joe is one of the founding partners of Elevate. His 25-plus-year career in public accounting includes more than a decade of serving clients within the financial services industry. Joe is drawn to owners of RIA firms who genuinely desire to grow, knowing he can help them make it happen.

Over the years, Joe's commitment to his clients' best interests has cemented his reputation as a trusted partner. He relies on his deep experience in financial services to determine the most favorable tax scenario for his clients, and is a staunch advocate for proactive tax planning.

Joe graduated from University of Illinois in Champaign-Urbana and is an active member of the AICPA and Illinois CPA Society. A lifelong Chicagoan, he has been involved in the Sheilah A. Doyle Foundation and has actively supported St. Jude Children's Research Hospital for years. He spends his rare free time planning adventures with his family, running, learning the piano, or playing golf. His two daughters are his pride and joy.

To Request Joe
as a Speaker:



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