



Helping the title industry thrive

**MAKE MORE MONEY, KEEP MORE OF THE MONEY YOU MAKE
AND MANAGE BUSINESS RISKS.**



The benefits of working with us:



Save money

Our services are designed to help you make more money and keep more of it.



Mitigate IT risks

Mitigate, transfer and avoid data privacy, security and transactional risks.



A one-stop shop

Get all of the business growth, risk and operational services you need under one roof.



Leverage deep title industry expertise

Put over 50 years of combined experience to work for you.

The title industry is built on providing peace of mind.

APRIO'S TITLE INDUSTRY SERVICES GROUP WAS BUILT ON HELPING TITLE PROFESSIONALS ACHIEVE THE PEACE OF MIND THAT ENABLES THEIR BUSINESSES TO GROW AND THRIVE.

As regulatory requirements, changing market conditions and consolidation continue to reshape the business landscape, the title industry faces a unique set of challenges. Does your organization have access to the expertise and insights necessary to transform these challenges into opportunities?

Aprio created its Title Industry Services group to help agents, underwriters, lenders and service providers realize profitable growth by managing risk and improving business operations. In addition, the group pioneered ALTA Best Practices compliance testing and reporting and, as the industry leader, has continued to refine it.

The depth of the team's industry knowledge and business expertise allows us to offer a comprehensive range of services that go far beyond compliance and serve the industry with innovation available nowhere else. Whether in compliance, business valuation, cybersecurity, enterprise risk management, mergers and acquisitions, wealth management or tax planning, Aprio protects its title industry clients and strengthens their businesses.

Let us help you make the right strategic decisions for your business that enable you to make more money, keep more of the money you make and minimize risk.

Lee Fields

Partner-in Charge,
Aprio Advisory Services and
Title Industry Services

770-353-4776

lee.fields@aprio.com



Comprehensive services and ideas that help you make more money, keep more of the money you make and manage business risks.

| | Service Offering | Make more money | Keep more of what you make | Manage & minimize risk |
|-------------------------------------|--|-----------------|----------------------------|------------------------|
| Risk Management Services | Cyber Security Risk Assessments | | ✓ | ✓ |
| | SOC 1, SOC 2, ISO 27001 | ✓ | ✓ | ✓ |
| | Enterprise Risk Management | | ✓ | ✓ |
| | Forensic Investigations | | ✓ | ✓ |
| | ALTA Best Practices | ✓ | | ✓ |
| | State-mandated Escrow Audits | | | ✓ |
| Business Growth Services | Business Valuation and M&A Due Diligence | ✓ | ✓ | ✓ |
| | Succession Planning | | | ✓ |
| | Tax Planning & Preparation | | ✓ | ✓ |
| | Wealth & Retirement Planning | ✓ | ✓ | ✓ |
| Business Operations Services | FIRPTA Withholding | | ✓ | ✓ |
| | Internal Audits | | | ✓ |
| | Outsourced Accounting Services | | ✓ | ✓ |
| | Outsourced Payroll Services | | ✓ | ✓ |
| | Custom Software Solutions | ✓ | ✓ | ✓ |

“After receiving numerous recommendations from our underwriters and other business vendors, we intensively interviewed a select list of companies and finally chose to partner with Aprio. Aprio has reaffirmed our decision by extensively communicating with us throughout the audit process and helping us strengthen our settlement systems through the use of reinforced internal controls.”

-John Kulasa, President, Providence Title Company of Texas



Helping the title industry thrive in every aspect of business

Aprio's Title Industry Services group has assembled an A-team of forensic accounting, cybersecurity and internal audit experts that can help you minimize risk without compromising your company's ability to capitalize on business opportunities.

BUSINESS RISK MANAGEMENT SERVICES

As a title professional, your business faces a wide variety of risks every day, from fraud to cybersecurity and lack of internal controls. Aprio's Title Industry Services group has assembled an A-team of forensic accounting, cybersecurity and internal audit experts that can help you minimize risk without compromising your company's ability to capitalize on business opportunities. Aprio's full range of business risk services for the title industry include:

Cybersecurity - Safeguard your Non-public Personal Information (NPI) and your business. Leverage our comprehensive information risk management methodology to raise the bar from compliance to true cybersecurity. Cybersecurity services include: FFIEC risk assessments, SOC 1 (Type 1 & 2) and SOC 2 (Type 1 & 2) testing and reporting, and ISO 27001 certifications.

Enterprise risk management - Weak internal controls enable fraud to occur in the title industry across the U.S. Aprio's Title Industry Services group can audit your internal controls to minimize your business disruptions, gain efficiencies and drive operational excellence. We provide comprehensive internal audit services from audit plan design to audit representation. Should your business ever suspect fraudulent behavior has occurred, our forensic investigation experts can detect fraud in your organization to protect your bottom line and reputation. We investigate defalcations, mitigate loss, recover assets and provide expert litigation support.

ALTA Best Practices compliance - Aprio, through its ComplianceSuccess Program, is the leading CPA firm in the nation providing ALTA Best Practices testing and reporting services. Services include ALTA Best Practices readiness assessments, readiness consulting, reviews and examinations.

State-mandated escrow audits - Escrow account risk management is something that keeps title agents and underwriters up at night. Detecting issues early closes the door on fraud and will minimize the defalcation cost to your bottom line, which is essential to the health and reputation of your business. We can help you minimize the risk of business disruption and financial loss through a structured, sequential approach that helps you set goals, implement strategies and execute solutions.

BUSINESS GROWTH SERVICES

Whether you're growing quickly, have plateaued or are looking for an exit strategy, Aprio's business growth services can help you take your business to the next level and achieve your goals through:

Business valuation and M&A - Maximize the value of your transaction. Whether you are considering acquiring another company or selling your business, our M&A and Business Valuation team can help you navigate the deal and ensure a successful transition and integration of people, processes and systems.

Succession planning - Prepare for the future. Will you grow, acquire, consolidate or retire? Every business is unique, and the optimum outcome for each organization will be different. Aprio's Title Industry Services team will work closely with you to understand your individual needs, goals and circumstances and develop a customized succession plan that's right for you and your business.

Tax planning and structuring - Improve your tax situation by working with Aprio. Every day, we work with businesses and individuals to enable the effective use of tax strategies and business structuring that ensures you stay in compliance while minimizing your tax burden.

Wealth and retirement planning - Integrate your tax, estate and investment strategies, and ensure that your company's 401(k) plan complies with regulatory standards. We can help you and your employees get the most from retirement through personal and business tax planning, 401(k) management and benefits advisory.

Whether you're growing quickly, have plateaued or are looking for an exit strategy, Aprio's business growth services can help you take your business to the next level and achieve your goals.



Aprio's Title Industry Services team can help you streamline your processes and implement technology solutions to improve your business and the bottom line.

BUSINESS OPERATIONS SERVICES

The day-to-day operations of any business in the title industry are the bread and butter of the company. Without efficient and effective processes in place, your business could be wasting valuable resources and losing money. Aprio's Title Industry Services team can help you streamline your processes and implement technology solutions to improve your business and the bottom line.

Business and personal income tax return preparation - Ensure that you're in compliance with all federal and state tax requirements for you and your business.

FIRPTA withholding - Accurately calculate and report your FIRPTA withholding by partnering with Aprio's Title Industry Services group. Our team of tax experts can ensure that you remit to the government the exact payment due.

Internal audits - You want to avoid risk because it is not only distracting - it is also costly and can be debilitating for a business if not mitigated. Aprio works with businesses in the title industry to improve internal controls, evaluate accounting issues and assess the quality of information that you use every day to make business decisions. Services offered include: financial statement audits, financial statement reviews and compilations.

Outsourced accounting services - Focus on core strengths so you can grow, improve business performance and increase profits. Allow Aprio's Client Accounting Services team to handle the back office for you. Aprio brings you a dedicated team of financial and accounting professionals delivering service on world-class technology for a fraction of the cost. Basic services include: AP/bill payments, employee expenses, AR cash receipts, payroll processing, financial reports, bank reconciliation and month-end/GL reconciliation.

Payroll - Aprio Payroll Services simplifies your business by enabling seamless integration between payroll, accounting, tax and benefit administration services provided by Aprio. Integrating these services allows you to save time and money, make better decisions and mitigate compliance risks.

Customized software solutions - As all business executives know, data is a critical element required to make decisions. After all, if you can't measure it, you can't manage it. The data you collect may be accurate, but do you know what it means? With success dependent on making "sound" short-and long-term decisions, Aprio can provide you with customized tools to help you understand, decide and act with confidence through our dashboard monitoring services.

Aprio is an integral part of the title industry community

Aprio is proud to be recognized as a preferred provider of compliance, accounting and consulting services by many of the country's top underwriters:

- First American
- Fidelity National Title
- Old Republic Title
- WFG National Title Insurance Company
- North American Title Insurance Company
- Alliant National Title Insurance Company
- Conestoga Title Insurance Co.

Aprio's Title Industry Services group works with over 400 title agencies across the country, including many of the most recognizable names in the industry.

- PGP Title
- Providence Title
- Crescent Title, LLC
- North American Title Group, Inc. and Affiliates
- Republic Title of Texas
- The Judicial Title Insurance Agency, LLC

Contact us:
For more information,
call 1-844-848-6529 or
visit us online at
www.title.aprio.com.

Aprio at a glance



400
Professionals



45
Partners



6 Industry
Specialties



Clients in
40+
Professionals



25+
Languages
Spoken



Clients in
49 of
the
50 States

Aprio's Title Industry Services leadership team



Lee Fields

Partner-in-Charge,
Advisory Services and
Title Industry Services



Michele Mosetti

Client Services
Executive



Adam Klein

Client Relationship
Executive



Paul Smith

Client Relationship
Executive

About Aprio's Title Industry Services group

Aprio's Title Industry Services group elevates the operational effectiveness of agents, underwriters, lenders and service providers across the title industry. The group pioneered ALTA Best Practices compliance testing and reporting and, as the industry leader, has continued to refine it. The depth of the team's industry knowledge and business expertise allows them to offer a comprehensive range of products and services that go far beyond compliance and serve the industry with innovation available nowhere else. Whether in compliance, business valuation, cybersecurity, enterprise risk management, mergers and acquisitions or tax planning, Aprio protects its title industry clients and strengthens their businesses, delivering peace of mind.

To learn more about Aprio's Title Industry Services, visit www.title.aprio.com.