

Aprio acquires Mize and Prism

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Aprio CEO and managing partner Richard Kopelman *Scott Areman*

Aprio, a Top 25 Firm based in Atlanta, has agreed to acquire Mize CPAs Inc., a Regional Leader based in Topeka, Kansas, along with its affiliated wealth management firm, Prism Financial Group LLC.

The deal is part of Aprio's plans to expand into the Midwest. Mize specializes in providing accounting and advisory services for entrepreneurs and McDonald's owner/operators.

The acquisitions are expected to close around Nov. 1, 2025. Once the deal closes, it will give Aprio two more offices in Topeka and Overland Park, Kansas, along with an additional 20 partners and more than 300 professionals. (Mize brings 19 partners and over 300 team members, while Prism adds one partner and eight team members).

Financial terms of the deal were not disclosed. Aprio ranked No. 24 on Accounting Today's 2025 list of the Top 100 Firms, with \$485.34 million in annual revenue, while Mize, a Regional Leader in the Midwest, earned \$47,462,837 in revenue.

Aprio is accelerating its Midwest expansion, and growing its regional team to more than 450 professionals, less than a year after entering the market. With three Chicago metro offices established earlier this year, Aprio is rapidly building a meaningful presence in the region. The firm plans to scale to 1,000 professionals over the next three years, reinforcing its commitment to growth and leadership in the Midwest.

"With the powerful addition of Mize and Prism, we will continue to deliver best-in-class service and transformative value to franchisees and business owners across the Midwest and beyond," said Aprio CEO Richard Kopelman in a statement Friday. "It's exciting to bring together firms that share our culture and vision for building the professional services firm of the future, while fulfilling our commitment to help our clients and team members achieve their boldest ambitions. We are honored to welcome Mize and Prism, two highly admired firms, to Aprio."

"Our strategy around M&A is around growth, and it is not to solve a talent shortage for the organization," Kopelman recently told *Accounting Today*. "We are involved in our local communities, encouraging students that are entering universities and thinking about their careers to give accounting serious consideration. It's personally been a great career for me. I encourage people all the time to consider it, and we have been working very closely with dozens and dozens of universities around the country that we've heard from to ensure that that we are attracting the talents and the people to the organization that we need."

Mize CPAs dates back to 1956 and is best known for being the largest accounting and payroll services provider to McDonald's owner/operators and delivering payroll, tax, and tech-driven business solutions to franchisees and businesses nationwide. Mize also serves the construction, manufacturing and distribution, and auto dealership industries. Mize's affiliate, Prism Financial Group, is a wealth management firm based in Kansas, providing comprehensive financial planning and investment advice to high-net-worth individuals, business owners, and franchisees across 42 states and managing \$1.8 billion in assets.

Prism will join Aprio Wealth Management, Aprio's registered investment advisor, providing fiduciary-based financial planning and investment management services that complement the firm's broader tax, legal, and advisory capabilities. With the addition of Prism, Aprio Wealth Management will reach \$5 billion in assets under management.

"Our proudest moments come from helping clients achieve their goals and unlock new growth," said Mize CPAs managing partner James Hilbert in a statement. As part of Aprio, we will deliver an unprecedented level of support and resources. We're also excited about the limitless potential this creates for our team members to grow and thrive. Together, we're committed to delivering the guidance, technology, and personal attention that drive real results."

As part of the transaction, Hilbert and Prism managing partner Tim Shmidl will join Aprio as partners. In a newly created role, Bryan Phillips will serve as the McDonald's owner/operator market leader.

Koltin Consulting Group CEO Allan Koltin advised all the parties on the transaction. "The combination of Aprio, Mize, and Prism creates a powerhouse in the Midwest, blending unmatched capabilities in serving franchisees, high-net-worth individuals and entrepreneurs," he said in a statement. "The synergies between these firms are extraordinary, uniting deep industry knowledge and a shared commitment to client success. Together, they are set to dominate the region, offering comprehensive support and opportunities that raise the bar for clients and talent alike."

Aprio received a private equity investment in July 2024 from Charlesbank Capital Partners. Earlier this year, it acquired RSM US's Professional Services+ practice in the U.S. and Canada, JMS Advisory Group in Atlanta, and AI accounting assistant platform TimeCredit.

"Certainly the M&A engine has continued to pick up," said Kopelman.

The firm recently announced plans to open a law firm in Arizona known as Aprio Legal LLC, in partnership with Radix Law. (KPMG has also recently opened a law firm in Arizona known as KPMG Law US.) Aprio has completed over 20 mergers and acquisitions since 2017, adding Ridout Barrett & Co. CPAs & Advisors last December, and before that, Antares Group, Culotta, Scroggins, Hendricks & Gillespie, Aronson, Salver & Cook, Gomerding & Associates, Tobin & Collins, Squire + Lemkin, LBA Haynes Strand, Leaf Saltzman, RINA and Tarlow and Co.