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**McKean Financial Merges into TAG**

*Transaction Enhances Range of Family CFO Practice Area of San Diego-Based Outsourced Accounting Consultancy*

SAN DIEGO – TAG, Southern California’s premier outsourced accounting consultancy, announced today that it has merged with McKean Financial, which has been providing family office services to its clients for over 32 years.

As part of the comprehensive agreement, Susie McKean, president of McKean Financial and her team of accountants will join TAG’s Family CFO practice area. Robert Scherer, president and founder of TAG, said the new combination ensures continuity in serving existing McKean clients while enhancing the depth of services and skills in this important and growing practice area. TAG’s Family CFO practice area aims to simplify its client’s lives through a personalized Wealth Concierge Program which offers a comprehensive array of services to individuals for the day-to-day management of their financial affairs.

This transaction marks TAG’s second acquisition in 2 months and is part of a series of strategic acquisitions designed to enhance the company’s scope of services in its three primary practice areas: outsourced accounting, accounting software and high-net-worth family accounting. The merger will increase TAG’s revenue and client base by more than 25%.

“McKean Financial has deep resources and a broad range of technical expertise in this specialized field, which complements our financial and accounting resources,” says Scherer. “As TAG expands, we will continue to look for additional acquisitions of the quality of McKean Financial that fit our vision, values and geographic needs.”

The McKean Financial merger includes a well-established customer base primarily located in the La Jolla area. Founded in 1976, McKean Financial established long-term, trusted relationships with their clients while offering a wide range of financial services from bill payment and cash flow analysis to vendor coordination. The organization of the newly-merged firms will enable these valued relationships to continue and thrive by drawing from TAG’s more than 30 years of

experience in the personal financial services industry. Susie McKean will continue to offer private fiduciary services to her long-term clients.

Anneke Stender, vice president of TAG's Family CFO practice and Susie McKean, now senior vice president of TAG's Family CFO practice, will head the division, providing leadership to the team and dependable results to clients. Stender has over 10 years of experience in the accounting and finance industry. Prior to joining TAG five years ago, she worked in the Private Client Group for both Salomon Smith Barney and Merrill Lynch.

"We have a tremendous amount of respect for what McKean Financial has accomplished throughout its history and we are very pleased to bring our companies together," said Stender. "TAG's Family CFO team is looking forward to a seamless integration and to continuing to serve McKean Financial clients with the personal touch and quality Susie pioneered. This merger will give us the momentum to continue the growth of our Family CFO practice into Orange County and Riverside."

TAG currently has 35 employees and has offices in San Diego and La Jolla. The company, which was originally founded in 1996 as two separate companies: The Accounting Group and Next Stage Software, officially launched its brand on June 3. TAG recently announced the acquisition of Contractor Software Corporation (CSC), a San Diego-based firm providing job cost accounting software for the construction industry. It plans on adding offices in Orange County and Riverside in the next year.

### ***About TAG***

TAG, an employee-owned company founded in 1996, provides an unparalleled array of customized accounting services and software to support entrepreneurial companies and high-net worth individuals with complex needs in achieving their business and financial goals. TAG serves as an engaged and trusted extension of each client's business, using skilled teams of experts and proprietary systems to ensure timely, dependable results, enabling its clients to focus on growing their businesses. It has particular expertise in financial services, trust accounting, the life sciences, professional services, manufacturing and the building industry. TAG is also an authorized business partner for Sage Software. TAG is based in San Diego and serves clients throughout Southern California. For further information, see [www.teamtag.net](http://www.teamtag.net).

### ***About McKean Financial***

McKean Financial, La Jolla's foremost accounting firm has been providing comprehensive personal financial services since 1976 to individuals in the day-to-day management of their financial affairs. McKean Financial offers a wide range of personalized financial services including: timely bill payment, cash management, record keeping, monthly transaction statements, budgeting and trust accounting.

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