



community
2026 life at YHB

steadfast

To our YHB community,

Each year when I sit down to write this letter, I think about the moments that defined the last 12 months. In 2025, those moments arrived quickly and often. Our profession changed at a pace few of us have ever seen. Yet through all of it, one thing stayed constant. YHB remained grounded in the values that have guided us for more than 75 years. That sense of steadiness shaped every decision we made.



Below is a look at where the profession stands, how YHB responded this past year, and what that means for you as we move into 2026 together.

A Changing Profession

Believe it or not, the accounting world has been moving fast. Many firms are being bought or accepting investment by large outside investors. Others are shifting their entire focus toward technology or racing to hire staff in a shrinking talent market. Automation and artificial intelligence have also become part of everyday work, changing how tasks are completed and how teams collaborate.

These changes can feel dramatic from the outside. They can even feel unsettling at times. But the important thing to know is that not all firms are responding in the same way. Some are chasing quick growth. Others are standing still and hoping familiar routines will carry them through.

We chose to remain steadfast in our commitment to our clients, team, and community by assessing how we can adapt in this changing environment to get even better at what we do and how we serve.

Choosing a Steady Path Forward

In 2025, we completed one of the most thoughtful planning efforts in our history. The result was a long-range plan that gives us clarity about where the profession is heading and how YHB can continue to serve you well in the years ahead. A few ideas guided that work.

Staying Independent and Locally Anchored

We chose to remain privately and locally owned. That means the decisions we make are based on what is best for clients, team members, and the long-term health of the firm, not the priorities of an outside investor. You can expect the same direct relationships and the same personal attention you have always known. This doesn't mean we're standing still though.

Investing in the Right Technology

Technology is changing the profession, but the goal is not to replace people. The goal is to make the work smoother, safer, and more helpful. We continued building a unified platform that allows teams to spend less time on repetitive tasks and more time on thoughtful conversations that matter to you. Better tools mean more meaningful information, clearer communication, and a better experience overall.

Expanding Advisory Support

We saw more clients looking for guidance throughout the year, not only during tax season or an audit. That led us to expand our advisory work in ways that support the everyday decisions you face. This included help with accounting operations, planning for growth, transaction support, understanding financial and wealth options, and navigating moments that can shape the future of an organization.

A growing number of clients also shared concerns about cybersecurity. To meet that need, we are introducing a Cybersecurity Advisory service built around practical support. Some clients simply want a point-in-time view of how secure their systems are and where the real risks might be. Others prefer a deeper, ongoing partnership. For them, we now offer virtual Chief Security Officer support, giving you a consistent advisor who understands your environment, helps you stay ahead of issues, and guides you through decisions as they come.

All this builds on the foundation of your tax return and financial statements. It does not replace them. It strengthens your overall picture and helps you move through the year with more clarity and confidence.

Focusing on Talent and Expertise

Across the country, fewer people are entering the accounting profession. That reality has made it even more important to invest in our team and technology. In 2025, we continued to strengthen leadership programs, flexible work options, and career development pathways. We also expanded our use of specialized support teams so our local staff can focus on higher level work and deeper client relationships. The goal is simple. You deserve a team that has the time and expertise to understand your world and meet you where we can bring the most value.

Progress You Can See

The past year brought tangible movement in how we serve clients. Our assurance team deepened its industry focus and put new tools to work, which sharpened analysis and raised the bar on audit quality. Tax moved steadily toward a true planning model, spending more time with clients throughout the year instead of concentrating conversations in busy season. Our CAAS team continued to expand, giving organizations day-to-day support that eases the pressure on their internal staff.

We also received regional and national recognition for client service and workplace experience. Awards are not the aim, but they signal that the changes we are making resonate with the people we serve and the people who choose to build their careers here. Culture has always been a hallmark at YHB. People and culture are our focus because they are the key to giving superior service to our communities.

What This Means for You

At the end of the day, you should feel the effect of these changes in simple, tangible ways. Your relationship with YHB should feel more forward looking. Your conversations should feel more focused on decisions and possibilities, not just documents or deadlines. And the people you work with should feel steady, informed, and available when you need them.

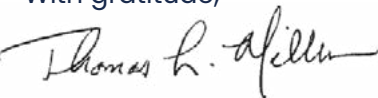
We want your experience with us to be easier, more helpful, and more connected. That is the heart of our work.

Looking Ahead with Confidence

As we enter 2026, I feel a deep appreciation for everyone who puts their trust in us. You have allowed us into your organization, your families, and your plans for the future. That is a responsibility we take seriously and never take for granted.

No matter how the profession continues to evolve, our commitment to you remains. We will keep listening. We will keep adapting with intention. And we will continue building a team and a firm that will stand beside you in every season. Thank you for being part of the YHB community.

With gratitude,



Thomas L. Milburn, CPA | CEO



by the numbers

These numbers are one way to show what it looks like when a firm stays close to the people it serves. They reflect our effort to offer guidance when it is needed, create space for learning, and stay connected in ways that support real decisions, not just deliver work.

63k+

friends of YHB read our e-mailed newsletter

24

YHB hosted seminars & webinars

2,300+

guests attended YHB hosted events

256

articles posted to the YHB website

18k+

community members read the YHB blog

170

breaking news & update emails sent

41

new employees joined the YHB team

34

future employees experienced YHB's internship

COMMITMENT IN ACTION



Our mission and vision ask us to do more than provide expertise. They ask us to lift the places where we live and work and to stand with people who rely on steady partners. That promise shows up most clearly in the stories that follow. These moments reveal how our team steps into the community with purpose, whether they are helping an organization move its work forward, offering guidance to someone who needs it, or giving their time simply because it matters. This is the deeper reason we gather these reflections each year. They remind us that our strongest impact comes not from the services we deliver, but from the way we choose to show up for others.



Members of our Winchester team rolled up their sleeves for United Way of Northern Shenandoah Valley's Day of Caring. They spent the day at Bowman Library in Stephens City, VA where a few dozen volunteers from the office cleaned windows throughout the building and helped refresh the space for the people who rely on it. It was a simple effort that brought real energy to the library staff and offered our team a chance to connect with one another while doing something meaningful for the community.

celebrating our impact with Comfort Cases

When children in foster care are moved to new homes, too often their belongings are carried in nothing more than a trash bag. Rob Scheer, a former foster child himself, set out to change that through his nonprofit Comfort Cases. Based in Rockville, Maryland, Comfort Cases provides foster children with backpacks filled with pajamas, toiletries, and comfort items. Offering not just essentials, but dignity and hope during a difficult transition.

YHB Joins the Mission

At this year's annual gathering of all team members at Firm Day, we came together to learn about Comfort Cases and launch YHB's own campaign to support foster youth. Our goal was simple yet powerful: raise \$6,000 to fill backpacks for children entering foster care.

In true YHB fashion, our firm immediately embraced the cause. Before we even officially shared the donation link, YHB team members had already raised over \$2,200. Within just weeks, we had surpassed our original goal and set a new one of \$10,000, which we quickly exceeded as well.

Exceeding Expectations

By the end of the campaign, YHB staff had raised an incredible \$16,768, with colleagues from Choreo Advisors contributing alongside our team. With YHB adding an additional \$10,000, the total impact exceeded \$26,000!

This effort was more than a fundraiser, it was a firm wide movement that showcased the heart and generosity of our YHB family.

Packing It All Up

On August 12, every YHB office hosted its own Comfort Cases Packing Party, bringing the campaign full circle. Across the firm, team members came together to assemble backpacks, write notes of encouragement, and see firsthand the difference our collective efforts would make. It was an inspiring day of teamwork, compassion, and community impact, the perfect reflection of what makes YHB truly special.

Thank you to everyone who donated, packed, and participated, including the team at Choreo Advisors, for helping make this initiative such a success. Together, we've delivered dignity, comfort, and hope to hundreds of children in foster care across our region.



employee resource groups & affinity groups

At YHB, our Employee Resource Groups (ERGs) and Affinity Groups (AGs) continue to be a driving force in building an inclusive and connected workplace. These employee-led communities help build a sense of belonging, offer opportunities for professional development, and help shape policies and initiatives that promote equity and inclusion. We're proud to share the progress and impact of our ERGs and AGs from this past year.



LGBTQ+ Network

The LGBTQ+ Network continues to celebrate and support the growing community of LGBTQ+ employees and allies across the firm. This year, the group organized several meaningful initiatives including hosting guest speakers and sharing Pride flag magnets across offices to promote visibility and allyship.



Remote Workers

The Remote Workers AG brought together YHB team members throughout the year for virtual luncheons, "water cooler" chats, and other team-building activities. These gatherings offer space to share stories and strengthen the sense of community among employees working remotely.



Mental Health Advocacy Group

Through education, training, and connection, YHB's Mental Health Advocacy Group works to strengthen awareness and resilience across the firm. This year, the group sponsored webinars on suicide prevention and guided meditation. They shared creative ways to prioritize our mental well-being, from book, movie, and podcast recommendations to self-care tips for employees to use during the firm's compression period.



Developing the Voices That Shape Our Culture

This summer, the leaders of all our ERGs and AGs connected in our Winchester office for a dynamic leadership training session. The day was filled with collaboration, skill-building, and sharing of best practices, aimed to strengthen our commitment to an inclusive and supportive workplace.



Organization of Latin American Accountants

The Organization of Latin American Accountants (OLAA) builds community and connection by supporting the Latinx population at YHB and their allies. This year, OLAA partnered with the Mental Health Advocacy Group to bring post-April 15 deadline piñata celebrations to each office. They later celebrated Hispanic Heritage Month by sharing stories, historical facts, and cultural recommendations, as well as distributing festive fiesta pins that captured the energy and traditions of Hispanic and Latin American communities.



Sustainability AG

The Sustainability AG shares resources to help employees make greener choices at work and at home. A highlight of the year was a volunteer day at Peaceful Fields Sanctuary, where colleagues from across the firm came together to support sustainable practices and animal welfare.



Network of Black Accountants

The Network of Black Accountants (NOBA)'s mission is to empower professionals within the firm and the community. This year, the group hosted a Juneteenth Lunch & Learn featuring a discussion of the film *Six Triple Eight*, organized Black History Month trivia for staff to enjoy and learn together, and sent cookies to each office from Junita's Jar, a black-owned and woman-owned business during Black History Month.



Women's Network

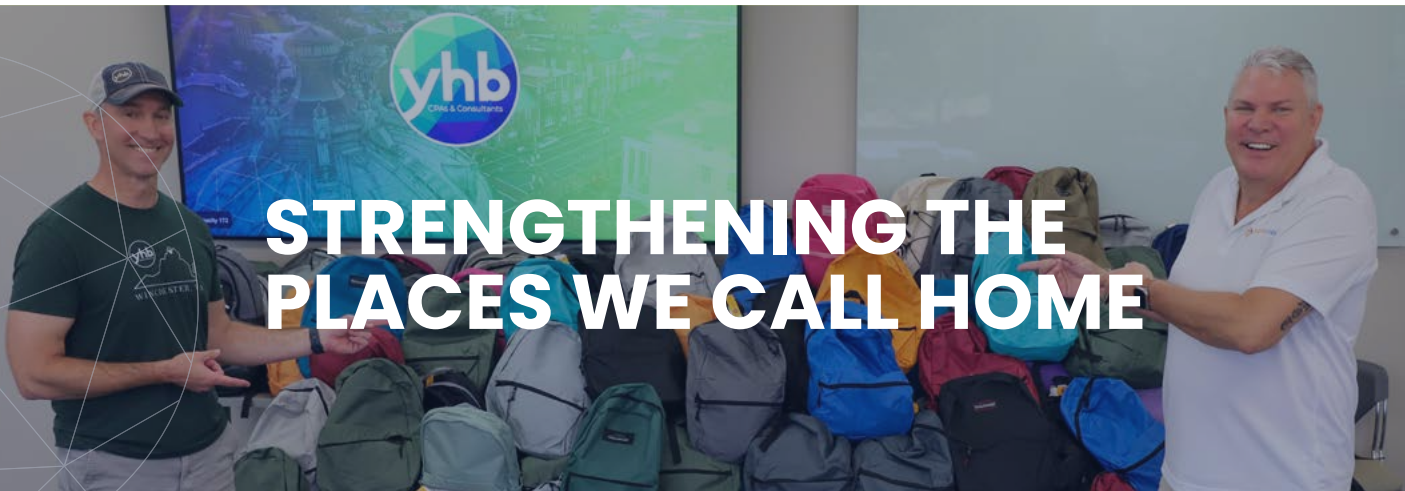
The Women's Network ERG empowers professional women at YHB to thrive through collaboration, mentorship, and leadership development. Throughout the year, the group shared encouragement, practical tips, and thoughtful insights that supported women at every stage of their careers. They also created space for honest conversations about growth, balance, and opportunity.



Working Parents Support Group

The Working Parents Support Group provides a space for parents at YHB to share advice, encouragement, and support as they navigate the balance between work and family life. This year, the group introduced a new resource outlining the benefits available to families at YHB who are welcoming a new child and hosted a live chef demo that featured nutritious lunch ideas for kids and parents.

STRENGTHENING THE PLACES WE CALL HOME



a year in review

The past year brought meaningful movement across YHB. Our teams earned recognition for leadership and community impact, and the firm reached milestones that signaled steady momentum in our long term strategy. This timeline captures the moments that defined the year and the people who drove them.

January

Lee Mariano recognized among Virginia Black Business Leaders

Mariano, YHB's Chief People Officer, was recognized among the 2025 Virginia Black Business Leaders by Virginia Business. Lee's leadership, dedication, and community impact continue to inspire us all, and this honor is a well-deserved celebration of her outstanding contributions.



March

YHB Joins the Choreo Partner Alliance

YHB entered a partnership with Choreo to expand wealth management support for clients with complex planning needs. The alliance gives our teams access to deeper estate planning, business exit planning, and tax-focused investment tools while strengthening our ability to coordinate advice across a client's full financial picture.



March

Jeremy Shen honored with Emerging Leader Award

YHB's Chief Strategy Officer was honored as the Emerging Leader of the Year at the Greater Good Awards presented by the Top of Virginia Regional Chamber. The awards celebrate individuals and organizations that exemplify resilience, creativity, and community spirit throughout the Shenandoah Valley.



January

Recognized as a Best Place to Work in VA

YHB was named to the 2025 Best Places to Work in Virginia list, a signal of the firm's steady commitment to a people first culture. The honor added to a growing slate of workplace recognition across VA, MD and national acknowledgment.



May

Krystal McCants Named Chairman of the VSCPA

McCants was appointed Chairman of the Virginia Society of CPAs Board of Directors for the 2025 to 2026 term. She will help guide the Board's strategic direction and support work that strengthens the CPA community.



RECOGNITION THAT REFLECTS YOUR TRUST

The past year brought a range of honors for YHB, from national rankings to awards for client satisfaction, and workplace culture. These recognitions matter because they point back to the relationships that make our work possible. They show that the standards you expect from us are being met and often exceeded. We are proud of the acknowledgment, but even more grateful for the trust that earned it.



June

Celebrating Teamwork at Firm Day

Our annual Firm Day brought our team together for a day of connection. This year, we did our own take on SNL and gathered at theaters across the region to celebrate the teamwork that makes YHB such a special place.



June

Purpose Driven Conversations at the Symposium

Our Not-for-Profit Symposium brought together over 100 passionate leaders and change makers dedicated to making a difference in our communities.



June

A Record Class of Interns Join YHB

This summer, we were thrilled to welcome 34 talented interns, our largest class to date! These bright, driven students brought fresh ideas and energy to our offices across the region.



September

Dorrie Franzello-Kurtz Named to Virginia Business Women in Leadership List

Franzello-Kurtz was named to Virginia Business' 2025 Women in Leadership list, a testament to her leadership, innovation, and dedication to mentoring the next generation.



September

Four YHB Leaders Named to Top Financial Professionals List

Krystal McCants, Andrew Lampropoulos, Brian Kling, and Kelly Domenick were named to Northern Virginia Magazine's 2025 Top Financial Professionals list.



August

VA Business Names Thomas Milburn Among Top Leaders

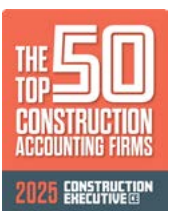
Milburn, YHB's CEO, was named to the Virginia Business 2025-26 Power List, recognizing the most influential leaders in business across the commonwealth.



November

What We Heard From You | 2025 Client Survey

This year's survey drew our highest level of participation yet and delivered encouraging feedback. Our Net Promoter Score rose to 79, well above the accounting industry's 45 average. Thank you for participating!



EVERYDAY YHB

This collection offers a snapshot of how our culture took shape over the year. New spaces, community events pulled teams together, and everyday moments reminded us what it feels like to work side by side. A simple record of the people and places that defined the past twelve months for our YHB team.



Winchester team joining the soup club tradition to break up the winter season



The Culpeper team went with a 101 Dalmatians theme for Halloween



Our Richmond team laced up for the annual Corporate Run



Creative time at the Falls Church holiday gathering



Catching the solar eclipse with our Owings Mills team



Our Not-for-Profit Symposium drew over 100 attendees in person & online



Halloween costumes in full force from our Leesburg team



Ribbon cutting with over 200 clients, team members & friends at our new Winchester HQ



Our entire YHB team came together for our annual Firm Day held across 3 movie theaters with an SNL theme. It is a yearly chance to step back from daily work, hear what is ahead, and reconnect with the broader YHB community



A client night at the Fredericksburg Nats game



Celebrating the opening of our new Fredericksburg office

a.i. & innovation at work

How YHB Is Learning, Adapting, and Shaping What Comes Next

When you look across YHB right now, you can see a steady push toward smarter ways of working. It shows up in how we train, how we run engagements, and how we bring new tools into the firm. None of it is technology for its own sake. The goal is straightforward. Give our people what they need to grow and give our clients an experience that feels clearer, faster, and more thoughtful.

You can see that mindset in the work led by Rachel Schaefer, who joined us this spring of 2025 as Director of Employee Development. Rachel stepped in with a focus on making learning part of the daily rhythm of the firm. Over the past several months she has met with teams across YHB, shaped development priorities, and introduced practical training around communication, listening, and presentation skills. The early reactions have been consistent. People leave her sessions with something they can use right away and a sense that the firm is investing in them as individuals.



Innovation also shows up in the tools we are adopting and the way we introduce them. Artificial intelligence has become part of the business conversation for nearly everyone, and many clients want to know how we are approaching it. Our stance remains careful and transparent. We look for ways emerging technology can support our people, strengthen accuracy, and remove friction from the work. We also maintain clear guardrails. In late 2025 we made the investment to give the entire firm access to Enterprise ChatGPT, which provides a secure environment that keeps client information protected and never trains on our data. If a tool touches client work, we explain how it is used and why it matters.



That same thinking guided our rollout of our new Assurance software, Inflo, a secure cloud platform that brings the financial statement process into a cleaner digital space. Inflo streamlines document exchange, helps us provide deeper analysis, and gives clients a clearer view of what we are doing. We launched it this summer with clients and will continue rolling it out through next year. The early feedback has already shown the value of a process that feels more organized and less repetitive.

We took an even bigger step with the launch of YHBI, our firm wide ERP system built on Oracle NetSuite. YHBI brings our data, workflows, and teams into one environment. It removes the clutter that builds when information lives in too many places and gives leaders a more complete picture of what is happening across the firm. More important, it sets the foundation for a stronger future. YHBI changes how we operate each day and signals where we are headed. One system built around one shared vision for the firm.

Why It Matters to You

All of this points to something larger than new tools or new training programs. It is about building a firm that can stand steady in a profession that is becoming more complex every year. Talent will stay tight. Technology will keep accelerating. Clients will expect sharper insight delivered with less friction. The firms that stay relevant will be the ones that invest early, learn quickly, and keep their focus on the people who rely on them.

That is the real purpose behind these choices. When our teams have better systems and better skills, they spend more time solving problems and less time wrestling with process. They see risk earlier. They bring stronger ideas to the table. They help clients make decisions with more confidence. That is what long term sustainability looks like in our field. Not size. Not speed. Strength built on clarity, discipline, and the ability to adapt.

Our clients should care because this work shapes the experience they receive. It means engagements that move more smoothly. It means insights that are easier to act on. It means a partner who stays ahead of what is changing rather than reacting to it. In a landscape defined by uncertainty, that steadiness matters.

Innovation is not our destination. It is the discipline that keeps YHB moving forward and ready for whatever comes next.





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**stay
connected**

