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CONTACT: Liz Gow ♦ 570-575-3588 ♦ [egow@apogee.us](mailto:egow@apogee.us) ♦ [www.apogee.us](http://www.apogee.us)



BDO delivers customized accounting, consulting, and financial advisory services to clients of all sizes – across industries, throughout the country, and around the world. We understand the changes and challenges facing institutions of higher education, from rising tuition and fees to reduced government funding, and our clients rest assured that their dedicated BDO industry leaders are at the forefront of the higher education conversation. What truly sets

BDO apart is our commitment to higher education and our dedication to delivering exceptional client service, without exception. We understand that at its core, our job is about helping – in thousands of different ways, for thousands of different clients – and that we measure success one relationship at a time.

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## CAPTRUST

CAPTRUST is an independently owned and operated retirement planning and investment advisory firm headquartered in Raleigh, NC with \$600 billion in assets under advisory, we serve as fiduciary consultants for 169 educational institutions, representing approximately 735 retirement plans and totaling over \$198 billion in assets under advisement in the education sector. As a firm, we work with 40 providers for 403(b), 457, and 401(a) plans — counting TIAA, Fidelity, and Vanguard as our top provider relationships. CAPTRUST has developed the specialized expertise required to help plan sponsors optimize their retirement plans while effectively managing fiduciary risk in a constantly changing environment. We are committed to the independence required for complete objectivity.

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As a nationally recognized firm, Cherry Bekaert has the resources to take your institution to the next level. Our higher education industry specialists understand the current operating environment and challenges facing independent colleges and universities, so we can help you make the most of emerging opportunities while minimizing compliance headaches. Our capabilities go far beyond audit and regulatory compliance and include customized solutions in the areas of risk advisory, cybersecurity, data analytics, technology consulting and solutions, compensation and benefits, and international tax services. Ranked among the largest accounting firms in the country, Cherry Bekaert specializes in offering solutions that impact our clients' ability to succeed and grow.

**CONTACT: Matthew Socha, Partner/Education Industry Leader ♦ 704.940.2680 ♦ msocha@cbh.com ♦ www.cbh.com**



CPL provides architectural and engineering services to higher education clients in the eastern US and in NC through our offices in Raleigh, Greensboro, and Charlotte. Our practice includes unique specialty services: space utilization/planning; building condition/system surveys; energy audits/planning; and capital/maintenance project planning. Dining, athletics, residence life, science & technology, renovation of historic campus buildings, and engineering of MEP systems are areas of expertise.

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**Duke Energy Sustainable Solutions** is a nationwide leader in sustainable energy, connecting large power users to the renewable and reliable energy infrastructure they need to achieve -- and exceed -- their goals. During the past 25 years, our highly experienced professionals helped 900+ commercial and public sector customers cut costs, lower emissions, increase resiliency and improve operational efficiency. On your campus, maybe you need to avoid unplanned downtime. Maybe you need to cut costs, refocus resources and get back to what matters most. Or maybe you're looking to cut emissions and reach ambitious sustainability goals. From wind and solar solutions to resilient backup power and managed energy services, we're here to help you imagine more. Do more. And be more. We'll connect you to innovative and sustainable solutions designed to help your business do more, reach higher and make a meaningful impact on the world around us.

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**BUILD WELL**

EDC provides Owner's Representation and Project Management services to institutional owners for the design and construction of their new and renovated facilities. Established in 1990 and based in Midlothian Virginia, EDC has delivered over four million square feet totaling over \$600 million of higher education and research and development projects. EDC manages the entire project from preliminary programming and budgeting through construction and occupancy.

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**First American Education Finance** provides NCICU institutions with customized financing solutions at preferred rates. For more than 20 years, First American has served the needs of the education community helping more than 800 schools deliver the best education possible to their students. Their unique financing solutions solve school challenges ranging from complex campus projects to technology management – all through a simple and transparent experience. Examples of First American Programs Include:

- ♦ Technology Renewal Program ♦ Software Program ♦ Campus Maintenance Program ♦ Energy Program
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**CONTACT: Phil Palermo ♦ 786.475.7234 ♦ phil.palermo@faef.com ♦ www.faef.com/education**



**HRP Associates, Inc.** is an environmental health & safety risk management consulting engineering firm that specializes in the fields of environmental and OSHA health and safety compliance, lab safety, industrial hygiene, asbestos, mold, and lead paint consulting, and property acquisition due diligence. To date, we have helped over 300 college and university campuses across the United States resolve their environmental, health and safety risk management challenges. HRP's professional environmental engineers have been helping private and public organizations meet complex regulatory compliance obligations for over 35 years. Example services include compliance auditing, technical EPA and OSHA compliance training, permitting, and industrial hygiene testing. HRP works diligently to keep you up to date with changes in federal, state, and local EH&S regulatory requirements and provide you with sound and practical solutions that you can realistically implement.

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## HIGHER EDUCATION

IMA is a national risk management and commercial insurance broker. IMA has a property & casualty insurance program that is endorsed by The Coalition for College Cost Savings and is designed specifically for private institutions. IMA also specializes in employee benefits and student and athletic insurance. IMA has clients in all fifty states and has offices throughout the country. IMA has a 100% success rate in driving down net costs for private colleges. To learn more about IMA's complimentary preliminary assessment, please contact Nick via the contact information provided below.

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The Higher Ed Studio of **McMillan Pazdan Smith Architecture** provides master planning, architectural and interior design services to college and university clients throughout the Southeast and has 6 office locations including one in Asheville and one in Charlotte. Experience includes academic, athletic and student life facilities on over 75 college campuses. We work with institutions to identify strategies for smart growth and fiscal responsibility through understanding our clients' culture and mission, creating spaces to enhance the social and educational experience specific to each.

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[rsmith@mcmillanpazdansmith.com](mailto:rsmith@mcmillanpazdansmith.com) or [kcalhoun@mcmillanpazdansmith.com](mailto:kcalhoun@mcmillanpazdansmith.com)**



**Millennium Advisory Services, Inc.** is a SEC registered investment advisory firm that provides 403(b) retirement plan services for private institutions of higher education throughout the eastern and mid-western United States. We work with other professional fiduciary partners offering a turn-key retirement plan solution to individual educational institutions as well as Multiple Employer Plans. Our solutions are designed to help plan sponsors meet their fiduciary obligations on both the participant level and the plan level. We provide communication and education services for plan sponsors as well as financial planning, fiduciary advice and professional asset management for plan participants and high net worth individuals. Millennium's mission is to help plan sponsors deliver a retirement plan to their employees that truly changes participant behavior and drives meaningful retirement outcomes, helping participants and their families achieve their personal and financial life goals.

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NCICU's members gain expert outside guidance and solid solutions for transforming themselves by engaging **Mindstream**. Our record of success with private not for profit colleges and universities demonstrates a history of refocusing strategy, boosting efficiency, and streamlining processes, while transferring knowledge to key stakeholders across the institution and maintaining each school's unique culture. Our services include:

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Rodgers is headquartered in the Carolinas and ranks among the nations' top construction managers. **Rodgers** offers full-service preconstruction and construction management services, with focused expertise in markets including healthcare, education, commercial/mixed use, cultural and community, senior living, and concrete services.

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Our Business Affiliates are companies or individuals whose work with NCICU colleges and universities has earned NCICU's endorsement.

