

NCICU is grateful to the corporate sponsors of this year's CFO Conference.

APOGEE

Established in Austin in 1999, Apogee is a leading provider of managed technology services that enable colleges and universities to innovate to enrich the campus experience and foster student vitality. Uniquely positioned to serve higher education, Apogee supports a community of more than one million students and administrators at over 350 colleges and universities nationwide. The company's comprehensive managed services portfolio includes managed campus networks, residential networks (ResNet), campus engagement, and HDTV and streaming video. Visit Apogee at 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.

BHDP

BHDP, an award-winning international architectural firm, is recognized for innovative and inspiring solutions in architecture, planning, interior design, experiential graphic design, project management, and strategic consulting to provide more informed design solutions for our clients.

BHDP's expertise in the planning and design of Higher Education facilities is founded upon our deep knowledge of the business of higher education and a passion for improving student and faculty experiences. We design places of learning and discovery that inspire thinkers, leaders, and professionals. Our strategic, people-focused approach encourages understanding, collaboration, and innovation, enabling us to further an institution's mission and strategy through its campus and buildings.



The challenges of higher education will continue at an extraordinary pace. As the industry continues to face these challenges, you will need an exceptional relationship with, and commitment from, a group of accounting professionals who advise you and support your efforts. For over 40 years, Brown Edwards has been dedicated to providing exceptional service and expertise to our higher education clients throughout the mid-Atlantic region. By partnering with our clients and understanding their needs and concerns, Brown Edwards is a true alternative to the "business as usual" approach. And, as a Top 100 firm, you can be sure you have access to industry-leading resources while receiving the personalized service our clients deserve and expect.



As a national full-service CPA and consulting firm devoted to serving nonprofit organizations, CapinCrouse provides professional solutions to organizations whose outcomes are measured in lives changed. Since 1972, the firm has served universities, seminaries, and other organizations by providing support in the key areas of financial integrity and security.



CAPTRUST

CAPTRUST is an independently owned and operated retirement planning and investment advisory firm headquartered in Raleigh, NC. With over \$750 billion in assets under advisory, we serve as fiduciary consultants for 190 educational institutions, representing approximately 850 retirement plans and totaling over \$200 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.

centrica

Business Solutions

Centrica Business Solutions is an integrator of sustainable energy solutions that works with higher education institutions to remove complexity. We deliver a full range of comprehensive energy solutions and services encompassing energy efficiency measures, renewable energy offerings, and demand response services. Our targeted approach to energy implementation establishes goals, identifies opportunities, installs solutions, and ensures support in delivering on financial and environmental agendas.



Cherry Bekaert^{LLP}

CPAs & Advisors

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.

CINTAS

READY FOR THE WORKDAY®

Cintas helps more than one million businesses of all types and sizes get **READY™** to open their doors with confidence every day by providing a wide range of products and services that enhance our customers' image and help keep their facilities and employees clean, safe and looking their best. With products and services including uniforms, floor care, restroom supplies, first aid and safety products, fire extinguishers and testing, and safety and compliance training, Cintas helps customers get **Ready for the Workday®**. Cintas has over 500 locations across the U.S. and 19 locations to serve the state of North Carolina.



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.



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.

BUILD WELL EDC manages the entire project from preliminary programming and budgeting through construction and occupancy.



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 Athletic Equipment Program Purchasing Card Program



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, COVID planning and response services, 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 40 years. Example services include compliance auditing, technical EPA and OSHA compliance training, permitting, and industrial hygiene testing, and Brownfield grant funding. HRP works diligently to keep you up-to-date with changes in federal, state, and local EH&S regulatory requirements and provides you with sound and practical solutions that you can realistically implement.



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.



The Higher Education Studio of McMillan Pazdan Smith Architecture partners with colleges and universities to support their growth in smart and fiscally responsible ways by providing master planning, architectural and interior design services for academic, athletic, and student life facilities. With 7 regional offices, including Asheville and Charlotte, our team members have served as trusted advisors and partners on hundreds of

campuses throughout the Southeast. We design environments that advance culture, create community, and enhance the campus experience.



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.



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:

- Institutional Transformation
- Cost Transformation
- Academic Transformation
- Admissions and Enrollment Transformation



National Management Resources Corporation was founded in 1978. National provides services exclusively to private education institutions. Services include physical plant maintenance and repair, custodial, landscape, event planning and setups, security, and

construction management. National tailors its services to meet the needs and goals of the clients they serve. With National, you can rest assured that your facilities look their best or recruitment, retention, and advancement.



TIAA is the leading provider of financial services in the academic, research, medical, cultural and government fields. TIAA has nearly \$1.2 trillion in assets under management (as of 06/30/2022) and offers a wide range of financial solutions, including investing, banking, advice and education, and retirement services.



Transact Campus Inc. provides NCICU campuses with an enabling agreement (pre-negotiated master terms) and aggressive year-one discounts on hardware and software. We provide solutions for securing campuses with access control and video surveillance; giving campuses the convenience of a true cashless environment; tracking attendance in the classroom; and offering students a

secure and easy way to make purchases on and off-campus using just their ID card or mobile credential. Our unified credential methodology includes using the ID card, mobile phone, and biometrics. Transact also provides a diversified payment solution through Payment Software for Tuition Billing, Payment Processing, Payment Plans, Refunds, and eCommerce Storefronts. These solutions leverage innovative technologies to improve the transaction experience for both students and higher education campus financial services teams. Over 65% of all NCICU campuses use Transact.



Truist is a purpose-driven company dedicated to Lighting the Way to Financial Well-Being for the people, businesses, and communities it serves. Truist leads a national movement inspiring Americans to build financial confidence. Headquartered in Charlotte NC, the Company has two business segments: Consumer and Wholesale. It operates an

extensive branch and ATM network throughout the high-growth Southeast and Mid-Atlantic states, along with 24-hour digital access. Certain business lines serve consumer, commercial, corporate, and institutional clients nationally.



United Bank, founded in 1839, is a community bank with dual headquarters in the DC Metro Region and Charleston, WV. With a history of safe, sound and secure banking practices, we pride ourselves on our ability to develop and nurture relationships, and we are committed to providing each relationship

with an unmatched level of service. Our network spans across the Mid-Atlantic and Southeast, offering nearly 250 full-service banking locations and loan production offices, with 47 full-service banking locations in North Carolina.

NCICU BUSINESS AFFILIATES

The NCICU Business Affiliate Program provides a mutually beneficial link between North Carolina's business community and the state's 36 private colleges and universities. Our Business Affiliates are companies whose work with NCICU colleges and universities has earned NCICU's endorsement. NCICU Colleges and Universities are encouraged to contact these business partners when there is a need for the products and services they provide. Contact information can be found on our website at <https://ncicu.org/business-affiliates/>

ADP	Harvest Table Culinary Group
AffinityLTC, LLC	Honeywell
APOGEE	HRP Associations, Inc.
Aramark	IMA
BDO	Jenzabar
BHDP	Kognito
BrownEdwards	McMillan Pazdan Smith
CapinCrouse	Millennium Advisory Services, Inc.
CAPTRUST	Mindstream
Cengage	National Management Resources
Centrica	Neteffect Technologies
Cherry Bekaert	Pharos
Cintas	PNC
Corporate Risk Management	Rodgers
CORT	Security Marketing Group
Coursedog	TIAA
CPL	Truist
Delta Dental	Transact
Duke Energy Sustainable Solutions	United Bank
EDC	USI Insurance
Elinvar	VerkadaVirtual Care Group
First American Education Finance	Womble Bond Dickinson