TECHNOLOGY INDUSTRY

Optimize Growth, Compliance, and Innovation

CBIZ provides comprehensive assurance, tax, risk, transaction, and advisory solutions tailored to serve technology companies at every stage of growth.

CBIZ.COM



How CBIZ Helps Technology Companies Succeed

The technology industry moves at an unprecedented pace, with companies navigating rapid innovation cycles, evolving regulatory requirements, and increasing cybersecurity threats. CBIZ helps technology leaders balance aggressive growth with stability, delivering proactive solutions designed for your distinct business model, growth stage, and funding environment.

What We Do

Assurance & Tax Solutions
Reduce tax burdens, leverage available incentives, and maintain compliance with evolving regulations.

Financial Accounting & Advisory Services
Build a sound accounting foundation to align your financial and operational goals in anticipation of future exit events.

Transactional Services Solutions
Facilitate successful deals with seamless, strategic transaction solutions.

Valuation Advisory
Ensure accurate valuations for intellectual property, acquisitions, and funding rounds.

Technology Solutions
Drive innovation, maintain compliance, and stay ahead of market demands.

Human Capital Management & Benefits Services
Enhance recruitment, retention, and compliance with robust total rewards and talent solutions.

In-depth Industry Expertise

We deliver financial and operational vision to guide a wide range of technology companies forward, including:

- Software Companies: Streamline finance, tax, and compliance to boost growth.
- IT & Managed Services Organizations: Enhance reporting, multi-state compliance, and cybersecurity.
- Semiconductors: Manage global tax structures and supply chain risks while enhancing financial performance.
- Clean & Green Energy Firms: Leverage technology to improve efficiency and energy management.
- AI & Machine Learning Companies: Secure venture funding and create tax-efficient growth strategies.
- Cybersecurity Firms: Develop products and services to protect against cyber threats and ensure privacy.



Industry Expertise & Proof

Why Technology Companies Choose CBIZ

Our team brings hands-on experience in the technology ecosystem, blending financial, operational, risk, and compliance strategies. We know that technology companies must move quickly, and we help you stay ahead of the curve with insights that impact and infrastructure that scales.

- **Industry Expertise:** We understand your fast-paced world and offer tailored solutions that help growth-stage companies, both public and private, navigate the evolving landscape.
- **Integrated Services:** Our integrated service model is designed to address a wide range of pain points, from financial accounting and advisory to human capital management.
- **National Presence:** Your team of advisors consists of CPAs, valuation experts, risk advisors, and benefits consultants — all working together to help your organization thrive.
- **End-to-End Support:** From early-stage startups to publicly traded companies, we offer support at every stage of growth.

> *"Technology companies move at a pace that demands agility, clarity, and proactive strategy. Our role at CBIZ is to help leaders unlock value and build resilient organizations that are not only ready for today's challenges, but positioned for tomorrow's opportunities."*
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> *— Michael Brooder, National Technology Industry Leader, CBIZ*

A Team Built for Technology

Our national technology team includes accounting and tax professionals, valuation specialists, cybersecurity and risk advisors, and human capital consultants who understand the complex financial, regulatory, and operational landscape of the technology industry. Whether you're scaling a startup, preparing for an IPO, or managing global compliance, you'll work with trusted advisors who understand your business and speak your language.

Outcomes & Next Steps

Scale With Confidence

CBIZ is a strategic ally to the people behind the platforms. We help technology companies operate with confidence, reduce risk, and deliver the financial clarity investors expect. Whether securing funding, optimizing financial operations, ensuring compliance with SEC and international regulations, or managing cybersecurity risks, our team is prepared to guide you forward.

Stay Ahead of What's Next

From evolving data privacy laws to rapid advances in AI, technology companies must stay nimble in an environment defined by constant change. CBIZ tracks the trends and regulations shaping your industry and delivers proactive guidance to help you refine your strategy and capitalize on new opportunities.

See How CBIZ Powers Growth-Oriented Technology Companies

Connect with the CBIZ Technology Industry Team

Cbiz.com/technology

CBIZ

CBIZ is a consulting, tax and financial services provider that works closely with CBIZ CPAs P.C., an independent CPA firm that provides audit, review and other attest services.

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