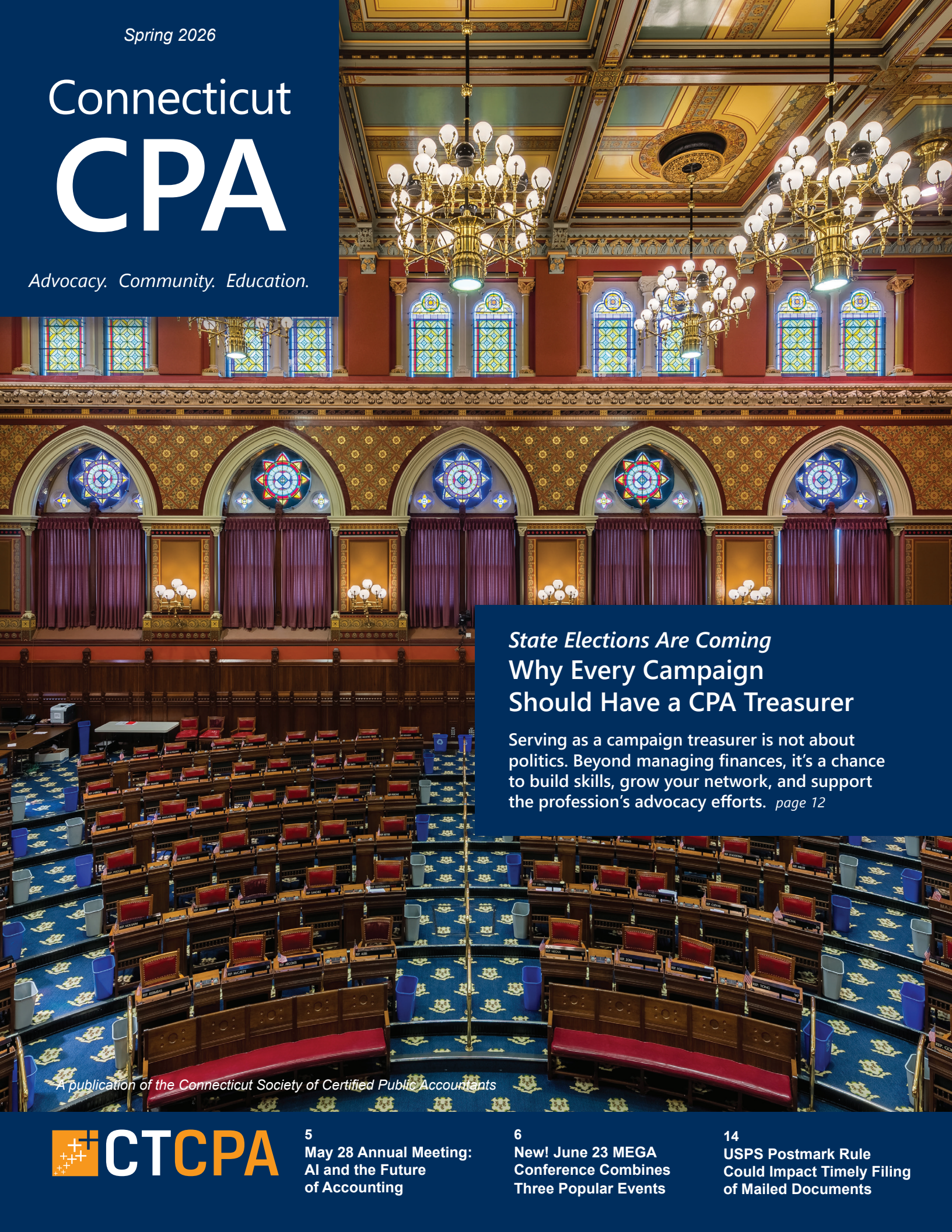


Spring 2026

Connecticut CPA

Advocacy. Community. Education.



State Elections Are Coming Why Every Campaign Should Have a CPA Treasurer

Serving as a campaign treasurer is not about politics. Beyond managing finances, it's a chance to build skills, grow your network, and support the profession's advocacy efforts. *page 12*

A publication of the Connecticut Society of Certified Public Accountants



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AI and the Future
of Accounting

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New! June 23 MEGA
Conference Combines
Three Popular Events

14
USPS Postmark Rule
Could Impact Timely Filing
of Mailed Documents



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CTCPA is more than a membership – it's the community that moves your career forward.

Today's profession demands a strong support system keeping you current, confident, and ready to lead:



Protect your profession with advocacy.

Your membership helps champion sensible regulation, fair enforcement, and a knowledgeable voice representing CPAs and finance professionals at the Capitol.



Drive innovation with the right tech tools.

As technology revolutionizes the profession, harness practical training, real-world peer insights, and expert guidance.



Connect and stay informed.

Be the first to get vital updates on regulatory changes, industry trends, and more through news alerts, Town Halls, education programs, and interest groups.

It's membership renewal time!

Please renew your membership at www.ctcpas.org/Renew.

A publication of the Connecticut
Society of Certified Public Accountants

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Connecticut CPA Spring 2026, Vol. 67, Issue 2 (USPS #004 433) is published quarterly for members of the Connecticut Society of CPAs by the CTCPA, 95 Glastonbury Blvd., Suite 411, Glastonbury, CT 06033. Periodicals postage paid at Hartford, CT and at additional mailing offices. POSTMASTER: Send address changes to CTCPA, 95 Glastonbury Blvd., Suite 411, Glastonbury, CT 06033.



From the Executive Director and CEO

The CTCPA Annual Meeting: Networking and AI Insights You Can't Miss!

Last year, many of you told us the networking breakfast was the highlight of the Annual Meeting – so we're excited to bring it back, bigger and better! Kick off your morning on Thursday, May 28 at the Sheraton Hartford South Hotel to catch up, spark new collaborations, and start your day energized by the power of our community.

We're thrilled to welcome keynote speaker **James Bourke** of Withum – one of the profession's most influential voices on technology. In his keynote presentation, Jim will show how artificial intelligence is already changing the way we work, offering practical insights to help you stay ahead, adapt, and thrive in this fast-moving era.

Between energizing conversations and forward-looking insights, this morning is designed to inspire and inform. Don't miss it!



Bonnie Stewart, Executive Director & CEO

Official Notice of the 2026 CTCPA Annual Meeting

In accordance with the bylaws, notice is hereby given that the annual meeting of the Connecticut Society of CPAs will be held on Thursday, May 28 at 8:00 a.m. at the Sheraton Hartford South Hotel in Rocky Hill. The election and installation of the 2026-2027 Board of Directors will take place at that time.

The report of the Nominating Committee is as follows:

Muhammad Malloy, CPA of CohnReznick LLP,
Chair-elect for 2025-2026, will be installed as Chair;

Amber Moore, CPA, MSA of Goldblatt Bokoff LLC for Chair-elect;

Katherine Patnaude, CPA, MSA of PKF O'Connor Davies for Treasurer;

Eliot Bassin, CPA, CFE of Fiondella, Milone & LaSaracina LLP for Secretary;

Kariann McDougall, MSA, CPA of EY for Advisory Council Chair;

Anne Comer, CPA of CRC Group for Member-at-Large;

Thomas Maddaloni, CPA of Birchwood Country Club for Member-at-Large;

Michael Sabol, CPA, CFE, CFF of MahoneySabol for Member-at-Large;

Jennifer Schempp, CPA of Beers, Hamerman, Cohen & Burger, P.C.
for Member-at-Large;

Other nominations may be made in accordance with Section 6.4 of the CTCPA bylaws. The full leadership slate is available at www.ctcpas.org/Nominees.

Sincerely,

CTCPA Secretary Katherine Patnaude, CPA, MSA of PKF O'Connor Davies

2026 CTCPA Annual Meeting

Thursday, May 28 • Sheraton Hartford South Hotel, Rocky Hill

1 CPE Credit • Member Price \$95 • Non-Member Price \$115

AI and the Future of Accounting – Transforming Every Corner of the Profession

Networking Breakfast:
8:00-9:00 a.m.

Business Meeting and Keynote Speaker:
9:00-10:30 a.m.

The CTCPA Annual Meeting celebrates the accounting profession through awards and recognition, our annual business meeting, and an engaging keynote speaker.

Following an interactive networking breakfast hour, we'll conduct our annual business meeting, taking a brief moment to thank outgoing CTCPA Chair **Mary Manfredi** of General Dynamics Electric Boat and welcome incoming Chair **Muhammad Malloy**, CPA of CohnReznick LLP, elect the 2026-2027 Board of Directors, install our new Advisory Council members, and honor the winner of the Jack Brooks Leadership Award.

Register or become a sponsor at
www.ctcpas.org/AnnualMeeting.



Featuring AI Expert

James Bourke
of Withum

Jim Bourke, CPA, CITP, CFF, CGMA, Managing Director of Advisory Services at Withum, will discuss how artificial intelligence and emerging technologies are no longer concepts for the future – they're transforming the way we work today. Waiting to adapt is not a strategy; it's a risk. Explore how AI is reshaping the profession, and why professionals who hesitate will fall behind.

You'll gain insights into practical applications of AI, the competitive advantages of early adoption, and actionable steps to position your organization for success in this era of rapid change. The future isn't coming – it's here. Are you ready?

Accounting Today named Jim to its 2025 annual Top 100 Influential People in Accounting list. The Top 100 are chosen for their outstanding contributions to the profession, including their leadership, mentorship, and how they use their voice to promote and advocate for the profession. Jim was praised for his global influence and for leading the industry toward transformation by advancing the integration of technology with accounting.

MEGA Accounting & Auditing Conference

Tuesday,
June 23
Cromwell
& Online
8 CPE credits

For the first time ever, we're bringing together three of our popular spring conferences into one powerhouse event: the **MEGA Accounting & Auditing Conference!**

This dynamic program features engaging general sessions along with specialized and cross-track sessions that deliver insights spanning multiple key areas. Attend in person – or join virtually from anywhere.



**Accounting
& Auditing**



**Not-For-Profit
Organizations**



**Governmental
Accounting & Auditing**

Schedule

Tuesday, June 23 • 8:30 a.m. - 5:00 p.m.

CPE Credit

8 hours

Registration Fees

\$289 Member Early **\$414** Nonmember Early
\$324 Member Standard **\$449** Nonmember Standard

Early registration applies through June 16.

Register: www.ctcpas.org/Conferences

Express Codes:

MEGA (in person) and **MEGAWEB** (online)

8:30 -
9:30 AM

GENERAL
SESSION 1



Looking for Fraud? Start with the Most Trusted Person
The Five Fraud Schemes Accounting Professionals Commonly Overlook

Robert Nordlander, CPA, CFE - Nordlander CPA, PLLC, Former IRS Criminal Investigator & Author

BREAKOUT
ROUND 1

ACCOUNTING

AUDITING

NOT-FOR-PROFIT

GOVERNMENTAL

9:40 -
10:55 AM



GAAP & AICPA Update
Thomas J. Groskopf, CPA, CVA, MBA
Barnes Dennig, Co.
AICPA's Center for Plain English Accounting (CPEA)



FASB Update
Jeffrey D. Mechanick
Financial Accounting
Standards Board (FASB)



GASB Update
Tony Boras, CPA
Crowe LLP

BREAKOUT
ROUND 2

ACCOUNTING

AUDITING

NOT-FOR-PROFIT

GOVERNMENTAL

11:05 -
11:55 AM



**Update on Standards for Reviews, Compilations, and
Financial Statement Preparation Engagements**

Michael P. Glynn, CPA, CGMA - AICPA
Kenneth Heaslip, MS, MBA, CPA, CGMA - Kenn Heaslip Seminars



**Peer Review Update: Common Deficiencies
and Best Practices**

Michael Brand, CPA, CGMA
BMSS Advisors & CPAs

12:00 -
12:45 PM



Lunch & Networking

BREAKOUT
ROUND 3

ACCOUNTING

AUDITING

NOT-FOR-PROFIT

GOVERNMENTAL

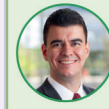
12:45 -
1:25 PM



Financial Reporting Implications of Tariffs
Thomas J. Groskopf, CPA, CVA, MBA
Barnes Dennig, Co.
AICPA's Center for Plain English Accounting



**Nonprofits: Where They Stand After
the Legislative Session & Where
They Are Headed**
Gian-Carl Casa
CT Community Nonprofit Alliance



**Government Audit Update:
Key Updates and Insights**
Tony Boras, CPA
Crowe LLP

BREAKOUT
ROUND 4

ACCOUNTING

AUDITING

NOT-FOR-PROFIT

GOVERNMENTAL

1:35 -
2:25 PM



**The New Emphasis on the Statement of
Cash Flow**
Kenneth Heaslip, MS, MBA, CPA, CGMA
Kenn Heaslip Seminars, LLC



**Practical Hybrid AI for Accounting Professionals: Using Data and
GenAI to Drive Efficiencies, Accuracy, Growth, and Adoption**
Rich Lanza
Grant Thornton LLP

BREAKOUT
ROUND 5

ACCOUNTING

AUDITING

NOT-FOR-PROFIT

GOVERNMENTAL

2:35 -
3:50 PM



**What We've Learned: Post-Implementation
Reviews of Leases and Revenue Recognition**
Sean C. Prince, CPA
Crowe LLP



**Staying Current: Key Updates to the Compliance
Supplement and Single Audit**
John D'Amico, CPA - CBIZ and CBIZ CPAs P.C.
XiXi Dong, CPA - CBIZ and CBIZ CPAs P.C.

4:00 -
5:00 PM

GENERAL
SESSION 2



**From Chaos to Control: Cybersecurity, Compliance and AI in a Rapidly
Changing World**

Konrad Martin - Tech Advisors, Inc.



Advocacy Update

Note: This information was accurate as of press time. Things change quickly during the legislative session. Check www.ctcpas.org/Advocacy for the latest.

Early Legislative Win: Provisions Threatening State Board of Accountancy Oversight Removed from HB 5222

Earlier this session, we alerted members to concerns with Sections 1 and 2 of HB 5222, which would have allowed the Connecticut Department of Consumer Protection (DCP) to take enforcement action in CPA matters without involving the State Board of Accountancy. That change would have weakened the expert oversight the Board provides in regulating this highly technical profession and would threaten mobility as NASBA and other states could deem us as not substantially equivalent.

This is excellent news for the profession and was an early legislative victory this session. Removing these provisions preserves the State Board of Accountancy's critical role as the expert body responsible for CPA oversight and discipline in Connecticut.

Currently, the Connecticut State Board of Accountancy – a body that includes licensed CPAs with deep technical expertise – has the authority to determine whether professional standards have been violated and what discipline is appropriate. DCP conducts investigations, but the Board provides the expert oversight necessary.

Sections 1 and 2 of the bill would have allowed DCP to conduct hearings, issue cease-and-desist orders, seek court action, and impose civil penalties of up to \$50,000 in CPA matters without any requirement to notify the Board, consult the Board, or follow the Board's determinations. Over time, this change could have sidelined the Board and weakened the expert oversight that protects both the profession and the public.

At our request and after a number of letters from our members, CTCPA CEO **Bonnie Stewart** and State Board of Accountancy Chair **Timothy Egan** met

with DCP leadership, including Deputy Commissioner **Jeffrey Marvin**, to discuss these concerns and the potential impact on CPA regulation. We're pleased to report that following that meeting, the Department of Consumer Protection requested those sections be removed from the bill, preserving the Board's central role in CPA oversight; the bill did pass out of committee with those sections removed.

This is excellent news for the profession and was an early legislative victory this session. Removing these provisions preserves the State Board of Accountancy's critical role as the expert body responsible for CPA oversight and discipline in Connecticut.

Thank you to the members who engaged on this issue and helped elevate the profession's concerns. Your advocacy continues to make a meaningful difference in protecting the integrity of CPA regulation.



Your Membership Is Vital to Protect the Profession

Strong advocacy and informed oversight do not happen without support. CTCPA's ability to protect CPAs and finance professionals in Connecticut is made possible by member dues.

By renewing your membership – and encouraging colleagues to do the same – you help champion sensible regulation, fair enforcement, and a knowledgeable voice representing CPAs and finance professionals at the Capitol.

Thank you for standing with CTCPA.

CTCPA State Tax Group Testifies in Support of Proposal to Simplify Bond Premium Rules, but Urges Further Action

CTCPA State Tax Group Chair **Alan Clavette** recently testified before the Connecticut General Assembly's Finance, Revenue and Bonding Committee in support of the State Tax Group's proposal, HB 5445 – *An Act Concerning the Amortizable Bond Premium Subtraction for Purposes of the Personal Income Tax*. More than a dozen group members and CTCPA CEO **Bonnie Stewart** also submitted written testimony supporting the proposal.

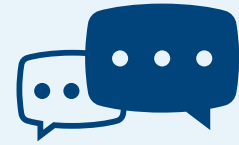
Under current law, taxpayers may subtract amortizable bond premiums only if the premium is tied to a trade or business – a rule that forces practitioners to perform “complex calculations” for non Connecticut municipal bonds and increases the risk of filing errors.

HB 5445 would remove that trade or business requirement, a change that would make the system more intuitive and reduce unnecessary audit scrutiny. The bill accomplishes this by eliminating bond premium language from the section of law dealing with business related expenses.

In her written testimony, Bonnie called the bill “a positive step” but urged lawmakers to strengthen it. She noted that taxpayers should not face “a more complex or less favorable state tax outcome just because a municipal bond was issued outside Connecticut.”

We've asked legislators to go further by explicitly allowing amortizable bond premium deductions for non Connecticut municipal bonds or, at minimum, providing a basis adjustment. We believe that either change would improve fairness, reduce administrative burdens, and make compliance easier for taxpayers and preparers.

We will keep you apprised as this moves forward.



CTCPA Stakeholders Meet with Department of Revenue Services

At the start of the legislative session, our stakeholder group met with the Connecticut Department of Revenue Services (DRS) to establish regular communication and ensure a strong, ongoing working relationship between CTCPA and DRS. These discussions help keep lines of communication open and ensure that the profession's priorities are clearly conveyed.

Following the close of the legislative session, stakeholders will meet again with DRS to recap developments, evaluate progress, and identify next steps on key issues the profession is working to address. This ongoing collaboration strengthens CTCPA's ability to advocate effectively on behalf of Connecticut CPAs.

Update on Federal Student Loan Proposal Affecting Accounting Programs

CTCPA is working with the AICPA and CPA societies nationwide to address a Department of Education Notice of Proposed Rulemaking (NPRM) that could affect accounting students.

The notice clarifies which “professional degree programs” qualify for higher federal graduate student loan limits under the One Big Beautiful Bill Act.

The NPRM designates 11 fields – law, medicine, pharmacy, dentistry, chiropractic, optometry, osteopathic medicine, podiatry, veterinary medicine, clinical psychology, and theology – as professional degree programs. Accounting was not included.

Loans made on or after July 1, 2026, would be capped at \$50,000 per year and \$200,000 lifetime for those 11 programs, while all other graduate students, including accounting students, would face lower limits of \$20,500 annually and \$100,000 total.

The Department has noted that this designation is intended solely for loan-limit purposes and is not a value judgment about the profession.

Nonetheless, excluding CPA-track programs could have serious unintended consequences; the profession already faces a growing talent shortage, many CPA candidates rely on graduate-level coursework to meet state licensure requirements, and limiting access to af-

fordable financing threatens the pipeline of qualified CPAs who protect investors, businesses, and the public.

In response, CTCPA – alongside the AICPA and other CPA associations – has formally urged the Department to include accounting programs within the definition of a professional degree. Programs leading to CPA licensure meet the Department's own criteria: advanced education, specialized experience, passage of a national exam, and state licensure.

CTCPA will continue advocating for equitable treatment of CPA-track programs and will keep you informed as the NPRM process moves forward.

A Profession United: Massive Multi-State Effort Advances New CPA Pathways and Mobility

Across the country, the accounting profession is undergoing one of the most significant licensure transformations in decades. State CPA associations and boards of accountancy are working together to strengthen the talent pipeline while preserving the rigor and public protection that define the profession.

This nationwide effort is supported by updates to the Uniform Accountancy Act led by the American Institute of CPAs (AICPA) and the National Association of State Boards of Accountancy (NASBA). CPA associations are working with legislatures across the country to advance pathway reforms aimed at reducing unnecessary barriers, increasing flexibility, and responding to evolving workforce needs.

Mobility legislation is also moving forward alongside these pathway reforms to ensure CPAs can continue serving clients across state lines without disruption with provisions that preserve interstate practice privileges and maintain consistency across jurisdictions.

To help members track this progress, we developed a national pathways map [right page] showing where legislation has passed, where it is pending, and

The evolution of the CPA Exam reflects how rapidly the profession itself is changing. As technology, data, and advisory services become more central to accounting, students are looking for pathways that align with where the opportunities are growing.

Connecticut's New CPA Pathways

Pathway 1: Post-baccalaureate degree, passage of the CPA Exam, and one year of general experience.

Pathway 2: Bachelor's degree plus 30 credit hours, passage of the CPA Exam, and one year of general experience.

Pathway 3: Bachelor's degree, passage of the CPA Exam, and two years of general experience.

For more, visit www.ctcpas.org/BeaCPA.

where discussions are underway. The map highlights the breadth of this coordinated, nationwide effort to strengthen and modernize the CPA credential.

Connecticut's Collaborative Leadership

In Connecticut, CTCPA has worked closely with the Connecticut State Board of Accountancy to implement new licensure pathways that balance education, examination, and experience requirements.

These reforms align with similar efforts underway in neighboring states such as Massachusetts, New York, and Rhode Island, reinforcing both regional alignment and national consistency.

Early Results from CPA Evolution

As licensure pathways expand, the CPA Exam itself has also changed through the recent CPA Evolution initiative. Candidates now complete three core sections – Auditing and Attestation, Financial Accounting and Reporting, and Taxation and Regulation –

along with a discipline that allows them to demonstrate deeper knowledge in a specialized area.

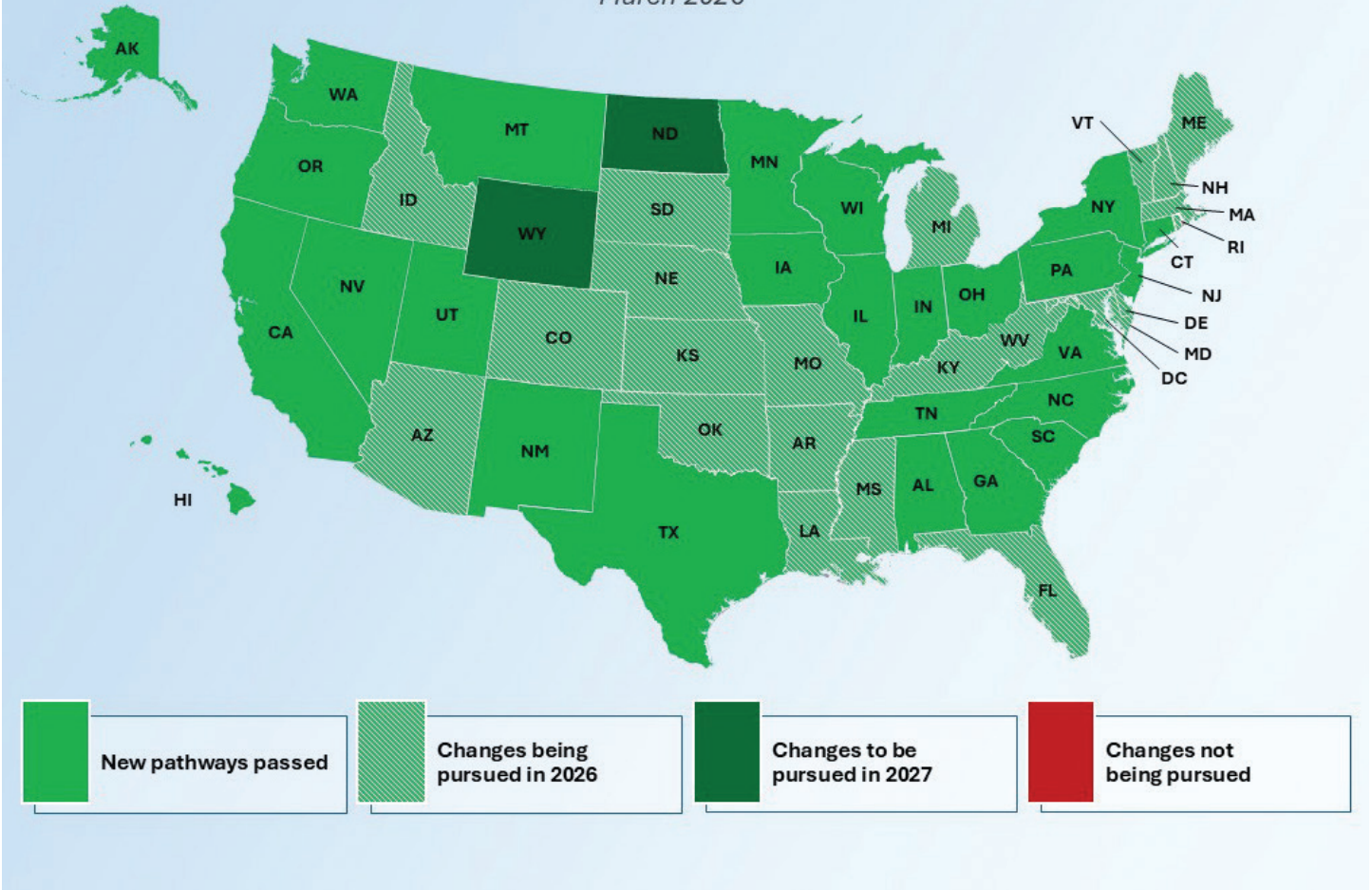
Discipline options such as Business Analysis and Reporting and Information Systems and Controls reflect the growing importance of analytics, technology, and advanced reporting skills in today's marketplace.

"The evolution of the CPA Exam reflects how the profession itself is changing. As technology, data, and advisory services become more central to accounting, students are looking for pathways that align with where the opportunities are growing," CTCPA CEO **Bonnie Stewart** said.

"We're seeing a significant number of our student members take advantage of the new CPA Exam disciplines by pursuing specialized college courses or earning focused certificates. These options allow candidates to deepen their knowledge in areas that are shaping the future of the profession – whether that's leveraging data for strategic decision-making, strengthening financial reporting expertise, or understanding

CPA Pathways Progress

March 2026



the systems and controls that underpin today’s digital environment,” Bonnie explained.

“It’s clear that when we modernize pathways, offer relevant specializations, and provide flexibility, students respond,” she added.

Strengthening the Profession for the Long Term

The modernization of CPA licensure is a strategic investment in the profession’s future.

“This is exactly why supporting CTCPA’s advocacy efforts matters,”

Bonnie explained. “Meaningful change doesn’t happen on its own – it requires collaboration with regulators, engagement with lawmakers, and a unified professional voice. Our members’ support allows us to advance solutions that strengthen the CPA pipeline while ensuring a smooth transition.”

As more states enact pathway and mobility legislation – and as candidates increasingly pursue the new CPA Evolution disciplines – the results are already becoming clear: greater accessibility, stronger workforce development, and a more resilient CPA profession nationwide.

Meaningful change doesn’t happen on its own – it requires collaboration with regulators, engagement with lawmakers, and a unified professional voice.

Our members’ support allows us to advance solutions that strengthen the CPA pipeline while ensuring a smooth transition.



State Elections Are Coming Why Every Campaign Should Have a CPA Treasurer

When members of a professional organization take the time to build relationships with their legislators, the impact multiplies. Lawmakers pay attention when they hear directly from knowledgeable, credible constituents, and the more voices they hear from a single profession, the harder it is to ignore that perspective.

Grassroots advocacy becomes far more effective when members already have personal connections with state legislators – ensuring lawmakers are ready to listen, take your calls, and consider your perspective whenever an issue affecting the profession arises.

If CTCPA members served as treasurers on even half of the campaigns in the upcoming state elections, the collective influence on our advocacy efforts would be enormous – and could make a real, measurable difference in shaping policy for Connecticut CPAs.

Why Be a Campaign Treasurer?

Being a campaign treasurer might sound intimidating, but for CPAs, it's a natural fit – and it comes with plenty of perks. Serving as a campaign treasurer is not about politics. Beyond managing finances, it's a chance to build skills and grow your network.

- **Put your skills to work.**
CPAs have the expertise to keep a campaign organized and transparent. Tracking donations, managing expenditures, and preparing accurate reports ensures compliance while allowing the candidate to focus on winning support.
- **Build professional relationships.**
Treasurers work closely with candidates and campaign teams, building trust and credibility. You'll also meet volunteers, donors, and community leaders – expanding your professional network in ways that benefit both your career and your organization.
- **Boost your credibility.**
Managing campaign funds demonstrates integrity, reliability, and leadership to lawmakers, colleagues, and clients.



It's the Perfect Time to Step Up, and We Can Help!

With statewide and local elections coming in 2026, there's no better moment to start.

The Connecticut State Elections Enforcement Commission (SEEC) provides resources and training for new treasurers, including guides, checklists, filing calendars, and online or in-person sessions. Compliance staff are also available to answer questions.

If we get enough interest from members, we can request a dedicated training specifically for our members!

Reach Out!

If you're interested in getting started or learning more, reach out to CTCPA CEO Bonnie Stewart at bonnies@ctcpas.org and she would be happy to share her insights and answer questions.

If you're already a campaign treasurer or are planning to become one, please let Bonnie know so we can add you to our Legislative Key Contacts list.



Become a CTCPA Legislative Key Contact

Every day at the State Capitol, legislators make decisions that affect you, your business, and your clients. That's why it's so important for our elected officials to understand how proposed laws could impact the business community.

As a CPA or accounting professional, you're in a unique position to help – you can break down complex tax, financial, and economic issues in a way that really matters. Lawmakers value hearing directly from their constituents, and your insight can make a real difference in the legislative process.

Our Legislative Key Contact program brings together members who can work with the CTCPA and elected officials during the legislative session when key issues arise. We'll keep you informed with the details you need.

>> Sign up or learn more at www.ctcpas.org/KeyContact.

Legislative Key Contacts will:

- **Build and maintain a relationship with a legislator.**
If you already know someone, that's fantastic – but if not, we'll help you make that first connection.
- **Call or meet with your legislator about key proposals or issues impacting the CPA profession.**
We'll supply you with all the background information and research you'll need.
- **Attend CTCPA legislative events and update sessions.**
We'll keep you in the loop and ready to make an impact.

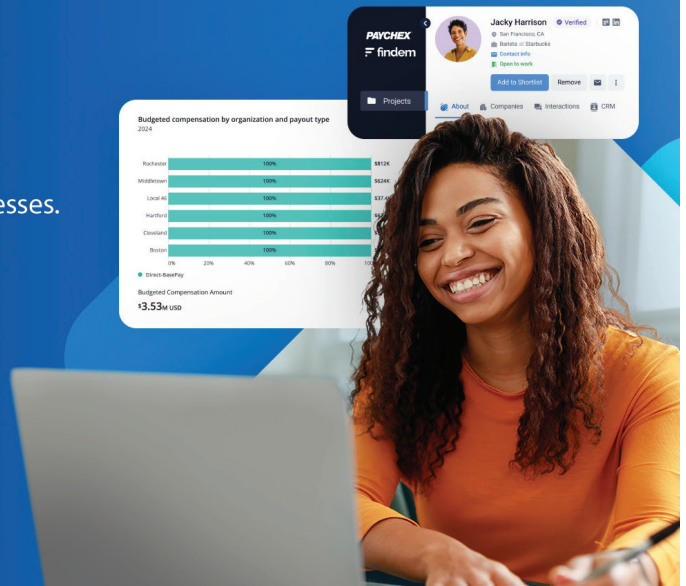
Use HR Technology to Streamline & Save Time

HR technology can simplify complex HR administrative functions, free up resources, and create more efficient processes.

Paychex can help your clients:

- automate their HR
- access business analytics to make informed decisions
- find the right mix of HR solutions and service for their business

Get started today at go.paychex.com/ctcpa-hrtech.
Simplify the grind. Elevate your role.



Paychex is proud to be an endorsed provider for the CTCPA.
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USPS Postmark Rule Could Impact Timely Filing of Mailed Documents

Under a new U.S. Postal Service (USPS) rule effective in December 2025, the USPS has clarified that a machine-applied postmark indicates the date the item is first processed by USPS using an automated sorting machine, which may be later than the day it was received by the post office. That means a document received by the post office on time could end up with a postmark dated after the deadline.

This can affect a wide range of mailed items, including tax returns and payments, payroll filings, elections, appeals, responses to notices, and other documents where timeliness depends on the postmark date. For tax filings, the timely mailing rule of IRC Section 7502, still applies, but relying on a machine postmark alone may be riskier.

If mailing a document close to a deadline, the USPS recommends one of the following:

- Ask for a manual postmark at the retail counter.
- Use Certified Mail or Registered Mail to get proof of the mailing date.
- Build in extra time whenever possible.

Please see FR Doc. 2025-20740 for more details.



CTCPA Town Hall Meetings On Demand: Critical Updates on the USPS Postmark Rule and Much More



Recent CTCPA Town Hall Meetings have brought together experts from a number of organizations to share breaking developments impacting CPAs including:

- United States Postal Service – to clarify the agency’s new postmark-handling policy.
- AICPA – to give us the latest information on the Department of Education and the status of accounting as a profession.
- IRS and DRS – to share timely insights and address critical federal and state tax issues.
- CTCPA’s contract lobbyists Roy & Leroy – to discuss the current legislative session.

Don’t miss your opportunity to get the inside scoop on what’s happening in the profession. Catch this and many more CTCPA Town Hall Meeting on demand now at www.ctcpas.org/TownHallMeetings

Make Sure You Don’t Miss What’s Next: Registration is open for the full 2026 CTCPA Town Hall Meeting series!

Get more information on page 18 of this issue or at www.ctcpas.org/TownHallMeetings.

Maximize Your ROI With These Top Five CTCPA Member Benefits!



Top five ways to innovate, advance, and make an impact:



1. Drive innovation with the right tech tools.

As technology revolutionizes the profession, harness practical training, real-world peer insights, and expert guidance to help you adapt, innovate, and lead.



2. Stay on top of news and trends.

Be the first to get vital updates on regulatory changes, tech trends, business strategy, and more through news alerts, Town Halls, education programs, and interest groups.



3. Track and shape policy and regulations.

Get direct access to the policymakers and actionable steps to get involved as we monitor developments and champion your profession and business.



4. Support your profession and community.


Jump into meaningful service – volunteer or join charitable initiatives that strengthen communities and elevate the public interest.



5. Fill the pipeline and develop leaders.

Inspire the next generation through student outreach, mentorship, and leadership development programs that equip emerging professionals to grow, excel, and lead.

Learn more at www.ctcpas.org/Benefits.



High-Impact Automation Opportunities for Accounting Firms

Insights from K2 Enterprises

Accounting firms are facing increasing pressure to streamline their operations, reduce manual workloads, and enhance client service. What are your high-impact automation opportunities? With a focus on professional education and technical training for financial professionals, your firm will be well-positioned to leverage automation to improve efficiency and scalability.

Here are three key automation opportunities that can transform their internal processes.

1. Opportunity Area: Automating Client Onboarding and Document Collection

The Challenge:

Client onboarding is often time-consuming, requiring manual follow-ups for missing documents, data entry, and verification. Many firms encounter delays in gathering tax forms, financial statements, and other essential client data, resulting in workflow bottlenecks. Above all, it wastes time to start an engagement without all needed supporting PBC (Prepared by Client) documentation.

The Automation Solution:

AI-powered client portals with automated reminders and Optical Character Recognition (OCR) can streamline document intake. Clients upload files directly, while automated validation ensures accuracy. Machine learning categorizes and routes documents to the correct workflow without manual intervention. Examples include Truss, Liscio, Kipsi, and Soraban.

Why It Matters for You:

By reducing the time spent chasing documents, there are many advantages. Your firm can accelerate onboarding, improve client satisfaction, and free staff for higher-value advisory work. Automated validation has advantages, as well. Validation minimizes errors, ensuring compliance and reducing the need for rework.

2. Opportunity Area: AI-Powered Financial Reporting and Analysis

The Challenge:

Generating financial reports, such as profit and loss statements, balance sheets, and cash flow forecasts, requires the manual consolidation of data from multiple sources. This process is prone to errors and time-consuming, particularly for firms managing multiple clients with diverse reporting requirements.

The Automation Solution:

AI-driven reporting tools automatically pull data from accounting software, reconcile transactions, and generate standardized reports. Natural Language Processing (NLP) can summarize key financial insights for quick client reviews. There are around 100 reporting tools for QuickBooks alone. Above all, we recommend reporting tools that support more than one platform. Examples include 4ImpactData, Clockwork.ai, Digits, and Jirav.

Why It Matters for You:

Automated reporting reduces human error, enabling your firm to deliver faster and more accurate financial insights. This positions the firm as tech-forward, enabling it to provide real-time financial intelligence.

Don't Miss These Specialized K2 Technology Conferences!

3. Opportunity Area: Intelligent Workflow Automation for Training and Compliance

The Challenge:

Your firm needs CPE training for accounting professionals. But managing course registrations, attendance tracking, and certification compliance manually is inefficient. Missed deadlines or incomplete records can create compliance risks. Above all, much free CPE is simply sales pitches for products or services with little strategic value.

The Automation Solution:

AI-driven learning management systems (LMS) automate enrollment, track attendance, and issue certificates upon completion. Chatbots manage FAQs, while predictive analytics flag at-risk participants who may need additional support.

Why It Matters for You:

Automating training workflows ensures seamless compliance, reduces administrative overhead, and enhances the learning experience for attendees. This allows your firm to scale training programs without increasing staff workload.

Conclusion

For accounting firms, automation is not just about cutting costs. It unlocks efficiency, reduces errors, and delivers better client experiences. In addition to the suggestions above, what other high-impact automation opportunities are there for your firm?

By focusing on document intake, financial reporting, and training workflows, firms can position themselves as leaders in the next wave of accounting innovation. The question is not whether to automate, but where to start.

Technology

May 21 & 22 • Online • 16 Credits • Express Code: TECWEB

Excel Mastery for Accounting Professionals

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Nonprofit Technology

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Artificial Intelligence

June 22 • Online • 8 Credits • Express Code: AICWEB

New Technology Innovations

June 29 • Online • 8 Credits • Express Code: K2TIC

Government Accounting Technology

August 24 • Online • 8 Credits • Express Code: K2GAC

Automation and Workflow Productivity Conference

October 5 • Online • 8 Credits • Express Code: K2AC

Artificial Intelligence

November 6 • Online • 8 Credits • Express Code: AICWEB-B

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December 14 • Online • 8 Credits • Express Code: KECWEB2

Tax and Technology Conference

December 23 • Online • 8 Credits • Express Code: K2TTC



Stay Connected. Stay Ahead. Attend a TechConneCT Roundtable.

Join fellow CTCPA members for virtual discussions each quarter on the latest tech trends affecting accounting. No CPE – but the tips, tricks, and expert guidance are priceless!

Whether you're a tech newbie or a seasoned pro, this is a free, collaborative space to share ideas, ask questions, and learn from peers and Technology Group experts.

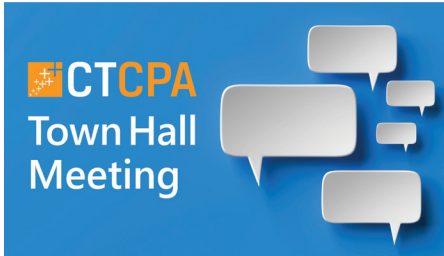
TechConneCT Roundtable: The Good, the Bad, and the Ugly of Tax Season IT

Thursday, May 14 • 9:00-10:30 a.m. • Online
Register at www.ctcpas.org/MemberMeetings.

Member Meetings



Register and find more at www.ctcpas.org/MemberMeetings.



CTCPA Town Hall Meetings – Register Now for the Full 2026 Series!

Join us for our monthly Town Hall Meetings – a must-attend event for anyone looking to stay ahead of the latest hot topics impacting the profession. This is your chance to engage with leading voices in the finance and accounting industry. Gain insights, ask questions, and connect with experts who are shaping the future of our field. Learn more and register at www.ctcpas.org/TownHallMeetings.

Third Wednesday of the Month • 9:00-10:00 a.m. • Online • 1 credit

May 20	September 16
June 17	October 21
July 15	November 18
August 19	December 16

Want to register for the full series?

Please email **Shenna Medrana** at shennam@ctcpas.org and she can take care of registration for you!



Virtual Premier Member Coffee Hours

Premier Members have exclusive access to the inside scoop from CTCPA Executive Director **Bonnie Stewart!** If you aren't a Premier Member yet, learn more and join at www.ctcpas.org/PremierMembers.

Wednesday, July 22 • 9:00-10:00 a.m. • Online
Wednesday, November 4 • 9:00-10:00 a.m. • Online



TechConneCT Roundtables

9:00-10:30 a.m. • Online

Connect with members of the CTCPA Technology Group for an exchange of ideas, best practices, and practical applications.

The Good, the Bad, and the Ugly of Tax Season IT
Thursday, May 14



Not-for-Profit Organizations Group Meeting

Focus on accounting, taxation, and financial reporting for not-for-profits.

Thursday, May 21 • 9:00-11:00 a.m. • Online



Governmental Accounting & Auditing Group Meetings

Discuss developments, regulations, and compliance issues with public sector and public accounting professionals.

Thursday, June 25 • 9:00-10:00 a.m. • Online
Tuesday, September 15 • 9:00-10:00 a.m. • Online



Educators Group Meeting

We'll provide a focused update on key developments impacting accounting education. Topics include CPA Evolution exam performance trends as of 2025 Q3, discipline-level insights, and an overview of recent changes to Connecticut's CPA education and eligibility requirements adopted by the State Board of Accountancy.

Friday, May 8 • 12:00-1:00 p.m. • Online

Connect, Give Back, and Have Fun!

Register and find more at www.ctcpas.org/MemberMeetings.

Enjoy these social events, networking, and charitable activities that make membership even more rewarding!

Crossing Paths: One Drink, Three Professions, Endless Connections

Thursday, May 7 • 5:00-7:00 p.m.

Truck Bar, Berlin • Members: \$30 Nonmembers: \$40

Join New and Young Professionals from accounting, law, and architecture for a relaxed night of connection, conversation, and community.

Accounting Scholarship Foundation Trivia Night

Thursday, June 11 • 4:00-5:00 p.m.

Online • Members and nonmembers: \$20

Sign on to this fast-paced, high-energy trivia night where quick reflexes, sharp memory, and maybe a little friendly trash talk could earn you ultimate bragging rights in the office, all while raising critical funds for the Accounting Scholarship Foundation.

Yankees vs. Red Sox: MLB Baseball Game in NYC

Saturday, August 29 • 4:00-9:00 p.m.

Yankee Stadium • Members: \$100 Nonmembers: \$140

We're bringing our members and families an unforgettable night at the ballpark as the New York Yankees face off against the Boston Red Sox. Enjoy prime seats along the third base line with this rare, discounted opportunity. Limited seats available, so don't wait!

"FIRM"ly Feud: Fast-Paced and Survey-Based Virtual Competition

Thursday, October 22 • 5:00-7:00 p.m. • Online

Members: \$20/team Nonmembers: \$30/team

Survey says ... You'll have a blast at our version of the classic game show! "FIRM"ly Feud is a fast-paced, survey-based showdown where accounting, law, and architecture firms compete head-to-head with peer firms to see who knows their profession best. Teams consist of up to four players.



CTCPA Accounting Scholarship Foundation Golf Tournament

Monday, July 20, 2026

The Farms Country Club, Wallingford

www.ctcpas.org/Golf

Join us as we return to The Farms Country Club for a fun day of golf, camaraderie, refreshments, and an afternoon reception while supporting scholarships for the profession's next generation.

Want to help make a great event even better? Join the Golf Group at www.ctcpas.org/Golf!

\$300 Individual Player Registration

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(Foursome Plus Sponsor Recognition)

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Consider Donating a **Raffle Prize!**

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CTCPA Groups and Committees

Special Interest Groups

Join groups and find upcoming meetings at www.ctcpas.org/Groups.

Connect with colleagues, subject matter experts, regulators, legislators, and more. Whether you're a seasoned professional looking to give back or a young professional just discovering your path, every member is welcome to join these special interest groups.



Accounting, Auditing, Financial Reporting Group

Discuss exposure drafts and enhance relationships with standard-setters.

Contact: April DiFalco • aprild@ctcpas.org



Cannabis Group

Meet and learn together with others exploring and working in this new hot topic.

Contact: Lisa Bugryn • lisab@ctcpas.org



Chief Financial Officers Group (Exploratory)

Share best practices, industry trends, regulatory updates, and other professional development opportunities.

Contact: April DiFalco • aprild@ctcpas.org



Educators Group

Discuss hot topics in this candid, conversational group.

Contact: April DiFalco • aprild@ctcpas.org



Employee Benefit Plans Group

Discuss issues affecting benefit plans, program audits, and employers.

Contact: Lisa Bugryn • lisab@ctcpas.org



Federal Taxation Group

Discuss issues and build relationships with legislators and regulators.

Contact: April DiFalco • aprild@ctcpas.org



Financial Institutions Group

Share trends, regulatory and legislative developments, and new pronouncements.

Contact: April DiFalco • aprild@ctcpas.org



Firm/Company Administrators Group

Connect and learn about best practices and tools to help your organization grow.

Contact: April DiFalco • aprild@ctcpas.org



Golf Group

Support scholarships/grants by helping plan our annual golf tournament.

Contact: April DiFalco • aprild@ctcpas.org



Governmental Accounting & Auditing Group

Talk FASB, GASB, and single audits with public sector and audit professionals.

Contact: Lisa Bugryn • lisab@ctcpas.org



Internal Audit Group (Exploratory)

Connect with fellow industry members in audit for idea sharing and collaboration opportunities.

Contact: April DiFalco • aprild@ctcpas.org



Not-for-Profit Organizations Group

Focus on accounting, taxation, and financial reporting for not-for-profits.

Contact: Lisa Bugryn • lisab@ctcpas.org



Pipeline Task Force

Work with subcommittees to inspire students, promote accounting, and support future Connecticut CPAs.

Contact: April DiFalco • aprild@ctcpas.org



State Taxation Group

Navigate the regulatory and legislative aspects of Connecticut tax compliance.

Contact: April DiFalco • aprild@ctcpas.org



TechConneCT Roundtable

Ask and answer questions on anything related to technology or software at our interactive roundtables.

Contact: April DiFalco • aprild@ctcpas.org



Trust, Estate, and Gift Taxation Group

Discuss taxation, trusts, gifting strategies, and more.

Contact: April DiFalco • aprild@ctcpas.org

Leadership Committees

Leadership committees have specific membership requirements and appointment procedures. Please contact the staff liaison for more.



Membership Committee

Assist with member recruitment and evaluating benefits to increase engagement and the member experience.

Contact: April DiFalco • aprild@ctcpas.org



New & Young Professionals Cabinet

Plan programs and volunteer opportunities for members aged 35 and younger.

Contact: April DiFalco • aprild@ctcpas.org



Peer Review Committee

Stay ahead of changing standards and explore the peer review market niche. *Membership by CTCPA Chair appointment.*

Contact: Lynette Lindner • lynettel@ctcpas.org



Investment Committee

Oversee the CTCPA's investment portfolio and report to the Board of Directors.

Contact: Bonnie Stewart • bonnies@ctcpas.org

Governance Committees

Governance committees are by election or appointment only. Please contact the staff liaison for more.



Bylaws Committee

Recommend bylaws modifications to the Board of Directors and voting members. *Membership by CTCPA Chair appointment.*

Contact: Bonnie Stewart • bonnies@ctcpas.org



Nominating Committee

Nominate a slate of leadership nominees and Advisory Council appointees. *Membership by CTCPA Advisory Council election.*

Contact: Bonnie Stewart • bonnies@ctcpas.org



Professional Ethics Committee

Investigate ethics complaints and maintain the Code of Professional Conduct. *Membership by CTCPA Chair appointment.*

Contact: Lynette Lindner • lynettel@ctcpas.org



Audit-Review Committee

Recommend and oversee an independent CPA firm attestation engagement. *Membership by CTCPA Chair appointment.*

Contact: Bonnie Stewart • bonnies@ctcpas.org

CTCPA Women's Awards



Pictured are honorees (back row, from left) **Mary-Jean K. Parnell**, CPA, CCA of SRC, Certified Public Accountants, P.C., **Dawn Meeker**, CPA of CBIZ, Inc., **Morgan Bielert** of CBIZ, Inc., **Amanda Jagello**, CPA of Whittlesey, PC, **Mary K. Wisenski**, CPA of Fiondella, Milone & LaSaracina LLP, **Kathleen E. McKeon**, CPA of Gitlin & Company, LLC, **Courtney Miller** of CLA (CliftonLarsonAllen), **Sarah A. Treese**, CPA of PwC US Tax LLP, **Laura J. Clark**, CPA, CFE of Risk & Regulatory Consulting, LLC, **Guergana Rangatcheva**, CPA of Bradley, Foster & Sargent, Inc., (front row, from left) **Caitlin Nero**, CPA of Whittlesey, PC, **Shari Elias**, CPA of Beers, Hamerman, Cohen & Burger, P.C., **Cynthia Calderón** of CohnReznick LLP, **Lucia Visconti**, CPA of CohnReznick Advisory LLC, and **Robyn Hunter** of PricewaterhouseCoopers LLP (PwC).

View the event photos and meet our winners at www.ctcpas.org/CTCPAWomen.

The 2026 CTCPA Women's Awards celebrated female CPAs and accounting professionals making significant contributions to their organizations and the profession. Thank you to our panelists **Melissa Ferrucci**, CPA of CohnReznick, **Susan Martinelli** of RSM US LLP, and **Danielle Wellington**, CPA, CIA of Pratt & Whitney for joining us for an inspiring keynote interview with emcee **Renee DiNino** of WFSB Channel 3.

View photos from the event, read more about each honoree, and watch inspiring videos about how they selected the accounting profession, future plans, and advice to their younger selves at www.ctcpas.org/CTCPAWomen.



(from left) Emcee **Renee DiNino** of WFSB Channel 3 leads a panel discussion with **Danielle Wellington**, CPA, CIA of Pratt & Whitney, **Susan Martinelli** of RSM US LLP, and **Melissa Ferrucci**, CPA of CohnReznick.

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Save 40% on select books of the month and 25% on all CCH tax and accounting books.

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A MOMENT AWAY



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CTCPA Insurance Hub



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Save on dental and vision insurance for you, your family, and your company. For complete details, contact Mark Williams with Acrisure at 860-351-0107 or MarWilliams@acrisure.com or view our Specialty Benefits Guide at www.ctcpas.org/MemberPerks.



Identity Theft Protection

Protect you, your family, and your workforce from identity theft and cyber attacks with a suite of protective tools and support services. Learn more at www.ctcpas.org/MemberPerks or contact Lauren Kuhn with Progressive Benefit Solutions at 203-208-4841.



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Member Spotlight on **Dick Dumont**

Where Practice Meets Purpose: A CPA's Path to Teaching

By *Caitlin Q. Bailey O'Neill* – Connecticut CPA Assistant Editor

In his first semester of community college, **Dick Dumont's** accounting professor didn't pull any punches.

"Dumont, you will never be an accountant."

Ouch.

With those words ringing in his ears – and with the needs of his country calling – Dick left college to join the U.S. Army, serving two tours in Vietnam.

"The experience changed my life and strengthened my resolve," Dick recalls. "When I returned home, I was determined to prove that professor wrong."

And that's exactly what he did.

Dick returned to school and earned his B.S. in accounting, graduating summa cum laude from Central Connecticut State University. He went on to obtain his CPA credential and began his career in public accounting. Dick later dedicated his professional career to the banking industry, becoming a Senior Officer in charge of audit and security.

While many of his peers began looking toward retirement, Dick chose a different path – one focused on shaping the next generation of accountants. He accepted an adjunct accounting position at Post University in Waterbury. A single teaching assignment progressed to becoming an accounting professor and ultimately led to his current role as Chair of the accounting program.

"Teaching has been one of the most rewarding chapters of my career," Dick shares. "Guiding students, watching them grow, and helping them achieve their goals brings me tre-



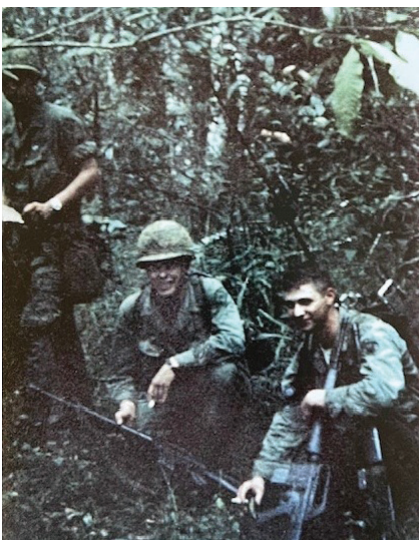
Dick in the classroom at Post University.

mendous satisfaction. In many ways, I see a bit of myself in each of them – a reminder that with determination, setbacks can become the foundation for lifelong success."

Last spring, Dick was featured in *Post University Magazine*. In the article, student after student shared stories highlighting his passion, mentorship, and enthusiasm.

According to students and alumni, Professor Dumont's ability to make accounting understandable – and even enjoyable – has earned him a special place in their academic journeys. Identifying untapped talent in the accounting classroom is Dick's superpower. Inspiring the next generation of the accounting profession has truly been his calling.

Dick, a previous recipient of the CTCPA's Annual Service Award, has a favorite quote: "If you like your job, you'll never work a day in your life."



Dick (center) in Vietnam near the Cambodian border on patrol.

Tell Us Your Unique Career Story – We'd Love to Feature You!

We know our members have stories worth sharing – maybe you serve a distinctive client niche, work in a surprising industry, or have taken a career path that's far from traditional. Whatever your journey, we want to hear about it!

To share your story, reach out to **Caitlin Bailey O'Neill** at caitlinb@ctcpas.org.

Thank You, 2025-2026 CTCPA Premier Members!

Thank you to these Premier Members for their commitment to help CTCPA stay strong today and into the future. Learn more and become a Premier Member at www.ctcpas.org/PremierMembership.

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Square10 Solutions LLC

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John C Bailey, CPA

John Barbosa Jr.**Greg Caggainello**

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Virtual Premier Member Coffee Hours

Premier Members have exclusive access to inside scoop from CTCPA Executive Director **Bonnie Stewart!** Pour yourself a cup of coffee and fire up your computer to connect with Bonnie and hear what's happening in the profession and at the CTCPA.

If you aren't a Premier Member yet, learn more and join at www.ctcpas.org/PremierMembers.

Wednesday, July 22 • 9:00-10:00 a.m. • Online

Wednesday, November 4 • 9:00-10:00 a.m. • Online

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for CPAs and Finance/
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Once a coupon book is purchased by a member of your firm/company, an email will be sent to the purchaser with your coupon numbers. These can then be applied at checkout for any programs with two, four, six, or eight CPE credits.

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View information on your upcoming courses, get virtual meeting links, download eMaterials for future and past courses, access purchased self-study courses, and more in the CTCPA My Professional Development Hub at www.ctcpas.org/My-CPE.

Our CPE tracker provides details and transcripts for the credits you've earned through CTCPA, and you can also add other courses you've taken to make your record-keeping complete.



Have multiple employees? Designate a CTCPA Firm/Company Administrator.

Identify an individual at your organization to be a CTCPA Firm/Company Administrator to:

- Register multiple individuals for programs,
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To enroll, please contact cpe@ctcpas.org or call 860-258-4800 and press 2.

Upcoming Conferences

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June 1 • Online • 8 Credits • Express Code: KECWEB1

Nonprofit Technology

June 15 • Online • 8 Credits • Express Code: K2NPTC

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June 29 • Online • 8 Credits • Express Code: K2TIC

Government Accounting Technology

August 24 • Online • 8 Credits • Express Code: K2GAC

Automation and Workflow Productivity Conference

October 5 • Online • 8 Credits • Express Code: K2AC

Artificial Intelligence

November 6 • Online • 8 Credits • Express Code: AICWEB-B

Technology

November 30 & December 1 • Online • 16 Credits •
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Employee Benefit Plans

May 19 & 20 • Online • 8 Credits
Express Code: EBPWEB



Financial Institutions

In partnership with the Iowa Society of CPAs

May 28 • Online • 8 Credits • Express Code: FICWEB



Taxation on Real Estate

In partnership with the Illinois Society of CPAs

June 17 • Online • 8 Credits • Express Code: TRECWEB



New!

MEGA Accounting & Auditing Conference

Bringing together three of our popular spring conferences into one powerhouse event!



Accounting
& Auditing



Not-For-Profit
Organizations



Governmental
Accounting
& Auditing

June 23 • Cromwell and Online • 8 Credits
Express Codes: MEGA (in person) & MEGAWEB (online)

Professional Development

▶ Register for these programs and hundreds more at www.ctcpas.org/Register.

Date	Title	Course Code	Member Early/Standard	Nonmember Early/Standard	CPE Hours	Location
May						
7	K2's Better Reporting with QuickBooks Online	BRQO2	\$79/\$89	\$114/\$124	2	Online
7	K2's Technology Update	TUP4-A	\$160/\$180	\$225/\$245	4	Online
8	Excel Accounting Tools: Most Useful Formulas and Pivot Tables	EAT4-A	\$160/\$180	\$225/\$245	4	Online
8	Harnessing ChatGPT – Unlocking Professional Efficiency	HCGPT4-A	\$160/\$180	\$225/\$245	4	Online
11-14	AHI: Level II – Semi-Senior Staff Training	SSST24-A	\$800/\$835	\$925/\$960	24	Online
13	K2's Technology for CPAs - Don't Get Left Behind	TEC-A	\$289/\$324	\$414/\$449	8	Online
14	K2's The Best Kept Secrets of Microsoft 365	MS3652-A	\$79/\$89	\$114/\$124	2	Online
14	K2's Excel PivotTables for Accountants	EPT4-A	\$160/\$180	\$225/\$245	4	Online
18	K2's Top PDF Features You Should Know	TPDF2	\$79/\$89	\$114/\$124	2	Online
18-21	AHI: Level III – Beginning In-Charge Staff Training	BIC24-A	\$800/\$835	\$925/\$960	24	Online
18	Outlook and Teams: Collaboration Champions	OTCC4-A	\$160/\$180	\$225/\$245	4	Online
19	Creating Powerful and Effective Presentations with PowerPoint	CPEPP	\$104/\$119	\$144/\$159	3	Online
19	Critical Tips for Avoiding Identity Theft and Data Breaches	CTAIT2	\$79/\$89	\$114/\$124	2	Online
19-20	Employee Benefit Plans Conference	EBPWEB	\$289/\$324	\$414/\$449	8	Online
19	Fraud in Today's Workplace: What Accountants Need to Know	FITW2	\$79/\$89	\$114/\$124	2	Online
20	K2's Accessing Your Company's Data with Power Query and Power BI	ACDPQ3	\$104/\$119	\$144/\$159	3	Online
20	K2's Microsoft Teams	K2MT4	\$160/\$180	\$225/\$245	4	Online
20	SSARS27: An Exciting Alternative in Financial Statement Preparation Services	HSSARS27	\$79/\$89	\$114/\$124	2	Online
21	Annual Accounting and Auditing Update	ACAU-A	\$289/\$324	\$414/\$449	8	Online
21	Estate Planning Conference (In-Person)	EPC	\$349/\$379	\$469/\$499	8	Online
21	Estate Planning Conference (Virtual)	EPCWEB	\$249/\$299	\$349/\$399	8	Online
21	Evaluating Fraud Risk in a Financial Statement Audit	ARF4	\$160/\$180	\$225/\$245	4	Online
21-22	K2's Technology Conference	TECWEB	\$489/\$524	\$614/\$649	16	Online
26	Free and Open Source Technology for Your Organization	FOST2	\$79/\$89	\$114/\$124	2	Online
26	Demystifying Accounting for Blockchain, Cryptocurrency, and NFTs	DAB4-A	\$160/\$180	\$225/\$245	4	Online
27	2026 Preparation, Compilation, and Review Services	HSSARS	\$289/\$324	\$414/\$449	8	Online
27	Exploring Business Valuation Fundamentals	BVF2	\$79/\$89	\$114/\$124	2	Online
27	Taxation of Tips and Overtime Under OBBBA	TTO2	\$79/\$89	\$114/\$124	2	Online
27	K2's Excel Essentials for Staff Accountants	EES-A	\$289/\$324	\$414/\$449	8	Online
28	Top Ten Questions from Partnership Clients Regarding Section 754 Election	T754-4	\$160/\$180	\$225/\$245	4	Online
28	K2's Advanced Excel	ADE-A	\$289/\$324	\$414/\$449	8	Online
28	Financial Institutions Conference (Virtual)	FICWEB	\$305/\$355	\$365/\$415	8	Online
29	Construction Contractors: Critical Accounting, Auditing, and Tax Issues	CONS	\$289/\$324	\$414/\$449	8	Online
29	K2's Getting Started with Artificial Intelligence	GSAI2	\$79/\$89	\$114/\$124	2	Online
29	K2's Understanding Your Ransomware Risk	URR2	\$79/\$89	\$114/\$124	2	Online
29	The How's and Why's of Data Analytics	HWDA2	\$79/\$89	\$114/\$124	2	Online
June						
1	2026 Financial Statement Disclosures	HFSD	\$289/\$324	\$414/\$449	8	Online
1	K2's Excel Conference	KECWEB	\$289/\$324	\$414/\$449	8	Online
1-4	AHI: Level IV – Management and Leadership Essentials Training	MLE24-A	\$800/\$835	\$925/\$960	24	Online
2	K2's Building a Cutting-Edge Virtual Office	BCEVO2	\$79/\$89	\$114/\$124	2	Online
2	Surgent's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships	HMBI-A	\$289/\$324	\$414/\$449	8	Online
4	Ethics: Practical Application of the AICPA Code of Professional Conduct and Review of CT	HETH4	\$160/\$180	\$225/\$245	4	Online
4	How to Settle a Client's Estate	SEAZ	\$289/\$324	\$414/\$449	8	Online
5	Preparing Not-for-Profit Financial Statements	ENFP	\$289/\$324	\$414/\$449	8	Online
8	Evaluating Evidence and Workpapers: Is It Enough?	EEW4	\$160/\$180	\$225/\$245	4	Online
9	Annual Update and Practice Issues for Preparation, Compilation, and Review Engagements	CORU	\$289/\$324	\$414/\$449	8	Online
9	Best Practices in Not-for-Profit Accounting and Reporting	BPN4	\$160/\$180	\$225/\$245	4	Online
9	Mid-Year Tax Strategies: Business Planning and the One Big Beautiful Bill Act	MIDB4	\$160/\$180	\$225/\$245	4	Online

Date	Title	Course Code	Member Early/Standard	Nonmember Early/Standard	CPE Hours	Location
9	Mid-Year Tax Strategies: Planning for Individuals Under the One Big Beautiful Bill Act	MIDI4	\$160/\$180	\$225/\$245	4	Online
9	Yellow Book and Single Audits: How to Stay in Good Graces and Out of Bad Places with Your Peer Reviewer	YBS4	\$160/\$180	\$225/\$245	4	Online
10	K2's Formatting Excel Spreadsheets the Right Way	FES2	\$79/\$89	\$114/\$124	2	Online
10	K2's Implementing Internal Controls in QuickBooks Online Environments New for 2026!	ICQ4-A	\$160/\$180	\$225/\$245	4	Online
11	2026 Private Company GAAP Financial Statements	HPCC4	\$160/\$180	\$225/\$245	4	Online
11	Lease Accounting: Making Sense of a Difficult Standard	HLA4	\$160/\$180	\$225/\$245	4	Online
11	Surgent's Individual and Financial-Planning Tax Camp	IFCP	\$289/\$324	\$414/\$449	8	Online
12	2026 – Tax Basis and Other Special Purpose Frameworks	HSPF4	\$160/\$180	\$225/\$245	4	Online
12	Estate Planning for Now and Beyond	EPXX	\$289/\$324	\$414/\$449	8	Online
15	AI-Driven Ethics and Data Analytics: A Roadmap for Accountants	AIE4	\$160/\$180	\$225/\$245	4	Online
15	Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses	GSM4-A	\$160/\$180	\$225/\$245	4	Online
15	K2's Nonprofit Technology Conference	K2NPTC	\$289/\$324	\$414/\$449	8	Online
15	Unlocking AI: Fundamentals and Generative AI for Accountants	UAI4	\$160/\$180	\$225/\$245	4	Online
15	Update on Recent AICPA Standard Setting: Staying Current in a Changing Environment	USS4	\$160/\$180	\$225/\$245	4	Online
16	2026 Accounting and Auditing Update	HFAU	\$289/\$324	\$414/\$449	8	Online
16	Are You Really Ready? Effective Disaster Recovery and Business Continuity Planning	AYRR2-B	\$79/\$89	\$114/\$124	2	Online
16	Buying and Selling a Business: Critical Tax and Structuring Issues	SELL	\$289/\$324	\$414/\$449	8	Online
16	K2's The New World of Expense Management: Smart Cards, Real-Time Tracking	NWEM3	\$104/\$119	\$144/\$159	3	Online
16	Securing Confidentiality: Safeguarding Client Data Under IRS Rules	SCSCD2	\$79/\$89	\$114/\$124	2	Online
16	The Complete Guide to Preparing Forms 706 and 709	706X	\$289/\$324	\$414/\$449	8	Online
17	K2's CPA Firm Update	CPAFU2	\$79/\$89	\$114/\$124	2	Online
17	K2's Excel Tips – Today's Best Features	ETBF2	\$79/\$89	\$114/\$124	2	Online
17	K2's Top Ten Productivity Booster Apps in Microsoft 365	TTPD2	\$79/\$89	\$114/\$124	2	Online
17	Limited Liability Companies: Losses, Liquidations, Terminations, Continuances, and Sales	ACL4	\$160/\$180	\$225/\$245	4	Online
17	Simply Auditing Not-for-Profits Efficiently	SAN4	\$160/\$180	\$225/\$245	4	Online
17	Taxation on Real Estate Conference	TRECWEB	\$405/\$405	\$505/\$505	8	Online
18	A Practical Guide to Trusts: Maximizing Financial, Estate, and Protection Strategies	PGTT	\$289/\$324	\$414/\$449	8	Online
18	K2's CRM – The Ultimate Business Automation Tool	CRM2	\$79/\$89	\$114/\$124	2	Online
18	Multistate Income Tax Issues	MIT4	\$160/\$180	\$225/\$245	4	Online
18	The One Big Beautiful Bill Act (OBBBA): What You Need to Know	OBB4-A	\$160/\$180	\$225/\$245	4	Online
18	K2's Ten PDF Tips You Need to Know	PDF2-A	\$79/\$89	\$114/\$124	2	Online
22	Compilations, Reviews, and Preparations: Engagement Performance and Annual Update	CRAU	\$289/\$324	\$414/\$449	8	Online
22	K2's Artificial Intelligence Conference	AICWEB	\$289/\$324	\$414/\$449	8	Online
22	Real Estate Boot Camp	RETC	\$289/\$324	\$414/\$449	8	Online
23	Four Tiers of Loss Limitations: A Guide to the Rules for Pass-Through Entities	FTL4	\$160/\$180	\$225/\$245	4	Online
23	MEGA Accounting and Auditing Conference – NEW!	MEGA	\$289/\$324	\$414/\$449	8	Cromwell
23	MEGA Accounting and Auditing Conference – NEW! (Virtual)	MEGAWEB	\$289/\$324	\$414/\$449	8	Online
25	Ethics and Professional Conduct: Updates and Practical Application	CL4GRE4	\$160/\$180	\$225/\$245	4	Online
25	IRS Tax Examinations and Hot Issues	EXI4	\$160/\$180	\$225/\$245	4	Online
25	Latest Developments in Government and Nonprofit Accounting and Auditing	GNAA	\$289/\$324	\$414/\$449	8	Online
25	Surgent's Individual Income Tax Update	BIT4	\$160/\$180	\$225/\$245	4	Online
26	Peer Review Update	PRU4	\$160/\$180	\$225/\$245	4	Online
26	This Year's Top Tax and Financial-Planning Ideas	IEF4	\$160/\$180	\$225/\$245	4	Online
26	Trump Accounts Created by OBBBA: A Comprehensive Guide for Accounting and Finance Professionals	TAC2-A	\$79/\$89	\$114/\$124	2	Online
26	What Tax Practitioners Need to Know About Medicare	MEDC2	\$79/\$89	\$114/\$124	2	Online
29	Accounting, Auditing, and Attest Update for Practitioners with Small-Business Clients	SMBP	\$289/\$324	\$414/\$449	8	Online
29	Annual Update for Accountants and Auditors	AUAA	\$289/\$324	\$414/\$449	8	Online
29	K2's New Technology Innovations Conference	K2TIC	\$289/\$324	\$414/\$449	8	Online
29	Maximizing Your Social Security Benefits	SSR4-A	\$160/\$180	\$225/\$245	4	Online
30	AH! AI for Accountants – Practical Applications	AHIAI2-A	\$79/\$99	\$114/\$134	2	Online
30	K2's Excel Best Practices	EBP-A	\$289/\$324	\$414/\$449	8	Online



Welcome, New Members!

We're pleased to welcome the following individuals to CTCPA membership:

New Certified Members

Jessica Chalecki
Doherty, Beals & Banks, P.C.

Esther Fong

Jessica Palmer
PKF O'Connor Davies, LLP

Theodor Rosenholm
HarperWhitfield P.C.

Arta Sadiku
KPMG

Marisol Salaman
State of Connecticut –
Department of Education,
Office of Internal Audit

Michael A. Smolinski

New Professional Colleagues

Steven Arnott
Halloran & Associates LLC

Thomas E. Baggott Jr.
Thomas E. Baggott Jr.

Katilyn Brijmohan
HarperWhitfield P.C.

Michael Bruno
Bailey Scarano, LLC

Sashoy Chambers
Rothstein & Company, LLC

Probir C. Das

Chaz DellaCorte
KPMG

Andrew Hansen
Bakewell & Mulhare LLC

Lianne Joslin
Miller, Moriarty & Company, LLC

Norbert Jurkiewicz
HarperWhitfield P.C.

Thomas R. Kashuba
Budwitz & Meyerjack, P.C.

Amin A. Lotfy

Joley L. Luppi
State of Connecticut –
Department of Education,
Office of Internal Audit

Gregory MacLeod
Simione Macca & Larrow, LLP

Samanta Music
HarperWhitfield P.C.

Max Paolillo
Bailey Scarano, LLC

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Simione Macca & Larrow LLP

Jahmai Scarlett
Beers, Hamerman, Cohen & Burger, P.C.

Danielle Turner
LCvista

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Mergers/Acquisitions

Tax Practice Sale/Merger Opportunity – Fairfield County. Retirement-minded CPA with tax practice (Gross 350K+) (CCH Prosystem Fx) seeks association with firm through sale/merger. Practice limited to tax preparation. Real estate available for sale. Contact Diana Builes at dianab@wrllc.net.

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Member News

Send your news to Caitlin Bailey O'Neill at caitlinb@ctcpas.org.



Paul Iannone

Paul N. Iannone and **Danny A. Pannese**, both associate professors in the Jack Welch College of Business and Technology at Sacred Heart University, wrote the cover story “CPA firm M&A tax issues” for the February 2026 issue of *The Tax Adviser*.



Danny Pannese



Michael Palombella

Michael Palombella recently joined The Innovative CPA Group as a Director. He brings extensive experience in tax planning, compliance, and strategic advisory services, serving closely held businesses and high-net-worth individuals with proactive, solutions-oriented guidance.

In addition, **The Innovative CPA Group** (ICG) announced its merger with Cerrone, Graham & Shepherd, P.C. of Worcester, MA. The combined firm will operate under the name The Innovative CPA Group and the team in Worcester will remain in place and continue to manage all client relationships from their current office. This merger strengthens the company’s expertise and expands their ability to offer integrated accounting, tax, audit, advisory, and consulting services.

The Innovative CPA Group also expanded globally, launching its new office in Bangalore, India.

Fiondella, Milone & LaSarcina (FML) announced the promotion of **Vinny Fanelli** and **James Goldkamp** to partner, tax and advisory services.



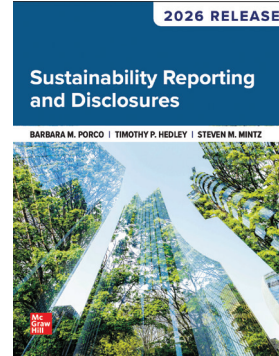
Vinny Fanelli

Vinny Fanelli focuses on U.S. federal and state income tax compliance and strategic planning with experience providing comprehensive services to private equity backed companies and closely held businesses including service providers, biotech, construction, manufacturers and real estate. Vinny specializes in individuals connected to flow through partnership and S Corporation businesses including high-net-worth individual tax returns.



James Goldkamp

James Goldkamp manages engagements for the firm’s Credits, Incentives and State Tax practice with a focus on federal and state research and development credits, state income tax, sales tax, and other federal and state credits and incentive services.



CTCPA Past Chair **Timothy Hedley** of Fordham University’s Gabelli School of Business has co-authored a forthcoming textbook, *Sustainability Reporting and Disclosures*, along with fellow faculty members Barbara Porco and Steven Mintz. According to Fairfield University, the book “provides students and professionals with a practical, accessible framework for understanding and applying these critical practices.”

Whittlesey received the 2026 Clearly-Rated Best of Accounting Award for superior client service. Whittlesey received satisfaction scores of 9 or 10 out of 10 from 79.8% of its clients, well above the industry average of 48%.

In addition, **Drew Andrews**, managing partner and CEO of Whittlesey, was interviewed in the article “AI reshapes how accounting firms operate” in the *Hartford Business Journal*. “What accounting is going to look like in three to five years is going to be totally different than what it looks like today,” Drew said in the piece.



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