

Connecticut CPA

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Inside:

Governor Lamont Declares Accounting Opportunities Week as Part of Extensive CTCPA Pipeline Initiative

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CTCPA Women's Awards

Celebrating Connecticut's exceptional female CPAs



Isabelle V. Curtiss, CPA/PFS
Isabelle V. Curtiss, P.C., CPA



Jeanna M. Doherty
Ernst & Young LLP



Kimberly Napp, CPA
Whittlesey



Teresa S. Polley
SSGA Select Sector SPDR Trust



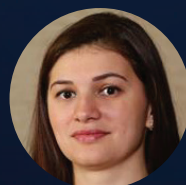
Noelle A. Taddei, CPA, MST
Educator, Accounting Coach,
and Career Advocate



Amber D. Tucker, CPA
FML CPAs



Melissa Braun, CPA
Whittlesey



Alina Macchia
Deloitte & Touche LLP

Meet this year's winners, who will be honored at a special event at the TPC River Highlands on January 18.

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2023 CTCPA Annual Meeting

Wednesday, May 10, 2023

Watch your email and www.ctcpas.org for details!

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To reserve your sponsorship, contact Liz Frazza:
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Editor’s Note

Governor Lamont Declares Accounting Opportunities Week as Part of Extensive CTCPA Pipeline Initiative



As finding and retaining qualified staff continues to be a top challenge for our members and their organizations, we’re upping our game to help ensure that the pipeline is full and the profession attracts the diverse talent it will need to thrive into the future.

We were thrilled to have **Governor Ned Lamont** proclaim November 7-11 as Accounting Opportunities Week in the state of Connecticut.

“Whereas the accounting profession offers a great variety of engaging career options – both in terms of the diverse organizations for which individuals might work, and the types of varied services they perform; now therefore, I, Ned Lamont, Governor of the State of Connecticut, do hereby officially proclaim the week of November 7 - 11, 2022, to be Accounting Opportunities Week,” he said in the proclamation.

Accounting Opportunities Week was part of a nationwide movement including the American Institute of CPAs (AICPA) and more than 40 state CPA associations to promote all the great things a career in accounting can bring. We placed members as speakers in high schools across Connecticut during Accounting Opportunities Week and beyond as part of this celebration of the profession.

Attracting aspiring CPAs to the profession starts well before college. Unfortunately, pipeline initiatives by their nature aren’t an overnight fix. The seeds we plant today could take years to bear fruit.

On page 10 of this issue, you’ll see a number of additional programs we’re aiming toward students. In addition to providing classroom guest speakers for high schoolers, we invited hundreds of them to take part in field trips to Connecticut universities for our three Accounting Is My Major (AIM) careers conferences this fall. We’re meeting with college students at career fairs on campus and helping them find job and internship opportunities through our Interview Day program.

As we move forward, we will be forming a pipeline initiatives task force led by CTCPA Immediate Past Chair **Brian Reilly** as well as working with students and educators to prepare for changes to the CPA Exam as part of the extensive CPA Evolution initiative to modernize CPA certification (learn more on page 7).

We’ll be with you every step of the way as we ensure the profession is strong and vibrant today and into the future.



See you next issue,

Kirsten Piechota, Managing Editor



CTCPA Advocacy Toolkit

Help protect your career, your company, and your clients by getting engaged in the legislative process with these simple steps.

Many issues related to how competitive our state is for our businesses and employees are decided by policy at the State Capitol. If more members become involved in these efforts, we can bring about far more meaningful change. At the same time, you'll be able to learn about the legislative process and grow as a leader.

If you have questions or are interested in becoming more involved, please contact Director of Operations & Advocacy Cindy Panioto at cindyp@ctcpas.org or 860-258-0213. She'd love to tell you more.



Stay informed with CTCPA updates.

CTCPA updates, including our Advocacy Update, Member eNews, and legislative alerts and advisories, bring you breaking news and identify the issues most important to the profession. Please be sure to read these alerts and reach out to your staff and colleagues to ensure they're doing the same.



Send messages with our simple action center when issues arise.

Grassroots advocacy – where a large number of constituents are mobilized and contact their legislators about a specific issue – is a vital part of the process and will often make or break a proposal's success. It's also the main action we simply can't implement without your help.

This level of involvement is extremely quick and easy. When an issue arises, we'll send you an alert explaining the situation and include a link to our VoterVoice Action Center, where we provide a pre-written message for you to send. All you need to do is edit it a bit with your own personal perspective or a little about yourself. Next, put in your address and hit "send message." The system will automatically identify your districts and send the message directly to your legislators. That's all there is to it!



Take your involvement to the next level.



Get to know your legislators.

Visit www.ctcpas.org/ActionCenter and enter your address under the "Find Officials" heading to get contact information for your representatives and senators. A note, email, or phone call is a great way to introduce yourself and let your elected officials know that you and the CTCPA are here to answer any questions related to taxation, business, and the profession. Many officials will be happy to meet up with constituents for in-person or virtual meetings when possible.



Make a personal ask for help on important issues.

Large-scale contact through our VoterVoice Action Center is imperative to create a groundswell and bring attention to our issues and proposals. However, there are many competing interests and factions at the Capitol. Personal phone calls or other outreach to legislators you have taken the time to get to know personally can be extremely effective to further bring important issues to the forefront.



Write and submit testimony.

Each year CTCPA staff and members testify on bills important to the profession. You could help change a law or requirement that poses significant issues for your company or your clients. If there is a legislative matter you have in-depth knowledge of or that you feel should be addressed in the upcoming session, please reach out to us.



From the Executive Director & CEO



Rediscover your CTCPA membership to make sure you're making the most of everything we have to offer!

There are so many benefits to being a CTCPA member that sometimes when someone asks me why they should join, I need to pause for a moment. From the strong peer-to-peer interactions I see in meetings and in our online community to the experts we bring in for professional development and committee meetings to the real difference we make while connecting our members to regulators and elected officials, sometimes it's hard to know where to begin.

Check our member benefits page to make sure you're making the most of your membership.

At right you'll see a sampling of some of the benefits we showcase in our full membership brochures. We've created two different versions – one for members in public accounting and one for those in business and industry. Those brochures (available at www.ctcpas.org/MemberBenefits) are not just for new members – they're also a great place for existing members to refamiliarize themselves with everything our organization has to offer.

While many of these benefits are evergreen and ongoing, we're also constantly shifting to bring you just-in-time news and information. Recent free member programs and committee meetings have focused on hot topics in ESG, EIDL, technology, the state's new cannabis industry, and more.

Bring your staff and colleagues into the mix. Don't forget your new and young professionals!

I hope you will also make sure your peers and younger team members recognize the value of membership. The best way to help them get involved is to bring them along with you to a committee meeting or encourage them to attend an event so they can see the benefits and opportunities firsthand.

We've provided ways to have fun and give back through our hugely popular New and Young Professionals Dodgeball Tournament (shout out to our top teams from Deloitte, FML, PWC, and CLA) as well as time to connect at a Wolf Pack game or give back at our Day of Giving.

We've put our new and young professionals benefits all in one place in a new membership brochure designed just for them – you can download that at www.ctcpas.org/MemberBenefits as well.

Something for everyone.

CTCPA really does have something for everyone. Whether you want to be around similarly minded individuals, get answers to tough technical questions in a seminar or workshop, or enjoy a fun evening out with your peers, there's a place for you in the CTCPA.

Bonnie Stewart, Executive Director & CEO



Rediscover your membership! www.ctcpas.org/MemberBenefits



Participate in peer-to-peer discussion in the specialized groups that are right for you.



Make connections to grow your business or client base.



Learn and have fun at our specialized new and young professionals, diversity, and industry-specific events.



Get to personally know key players at regulatory agencies.



Get breaking news and insider information from the State Capitol and policymakers as we advocate on your behalf.



Ask questions and swap knowledge in our private online community.



Keep on top of emerging issues from technology and the economy to the latest regulatory and compliance developments.



Take advantage of specialized professional development at a generous discount.



Save with our member perks and affinity partnerships.

CPA Evolution: New Exam on Track for January 1, 2024

The multi-year CPA Evolution initiative to make the CPA licensure and exam future-proof and more reflective of today's business environment is quickly heading for completion – and currently on schedule. That means that on January 1, 2024, less than one year from now, we will have a new CPA Exam.

If an individual passes and retains credit for all four CPA Exam sections by December 31, 2023, the changes to the CPA Exam will NOT impact their journey. An individual who will still be working through the CPA Exam in January 2024 will need to switch over to sitting for the new CPA Exam at that time.

CPA Exam Transition Policy

The National Association of State Boards of Accountancy (NASBA) has announced the transition policy for individuals continuing to sit for the CPA Exam into 2024.

Candidates who have credit for AUD, FAR or REG on the current CPA Exam will not need to take the corresponding new core section of AUD, FAR, or REG on the 2024 CPA Exam. Candidates who have credit for BEC on the current CPA Exam will not need to take any of the three Discipline sections.

If, however, a candidate loses credit for AUD, FAR, or REG after December 31, 2023, they then must take the corresponding new Core section of AUD, FAR, or REG.

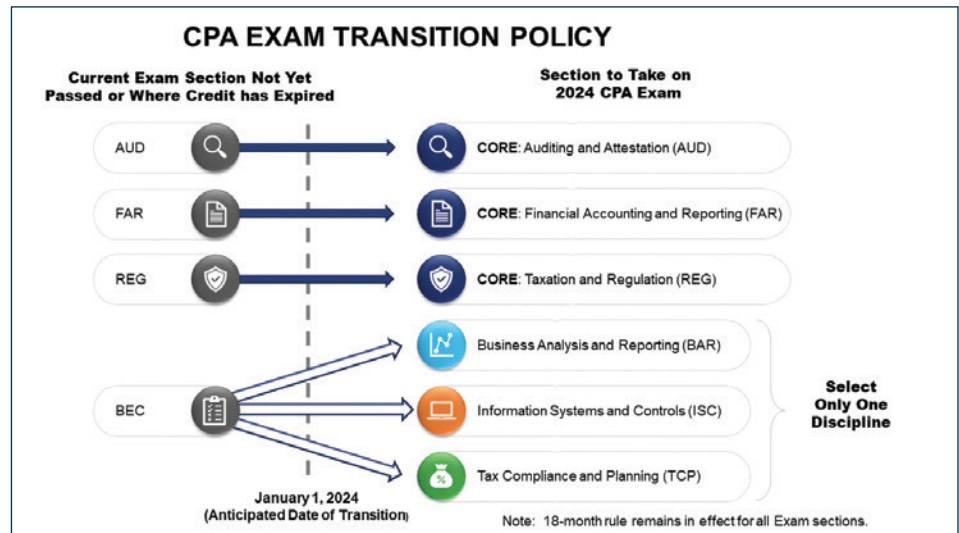
A candidate who loses credit for BEC after December 31, 2023 must select one of the three Discipline sections to be tested.

It is anticipated that testing will commence on January 10, 2024, for all sections. While the core sections (AUD, FAR, and REG) will first be available for scheduling through March 26, 2024, in the first quarter of 2024, the discipline sections (BAR, ISC, and TCP) will be available through February 6, 2024. Scores are anticipated to only be released once per test section per quarter due to necessary standard-setting analyses and activities.

Connecticut CPA Exam Section Credit Extension Announced

Due to a limited testing schedule and delayed score releases anticipated in 2024, the Connecticut State Board of Accountancy recently approved a proposal that will allow candidates with CPA Exam credit(s) for sections passed within 18 months of January 1, 2024 to have those credit(s) extended to June 30, 2025.

Download the chart below and additional information about the CPA Exam transition policy at www.ctcpas.org/TransitionPolicy.



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Connecticut State Board of Accountancy News and Updates

Increased Reinstatement and Late Fees

The Connecticut State Board of Accountancy (SBoA) has had extensive discussions about reinstatement and late fees (Proposed Revisions to Regs. §20-280-25). There have been several cases this year that have come before the board concerning CPAs who were practicing without an active license. During those conversations, late fees were discussed. After a lengthy debate, the SBoA approved the staff's recommendation to propose a new late fee schedule.

The schedule is as follows:

You have 90 days after your license lapses to renew your license. You must apply for reinstatement if you do not renew in those 90 days. Should you wait more than three years, you will have to apply for a new license.

If you apply for reinstatement:

For persons who did not practice while the license lapsed:

- No changes (still \$565 reinstatement fee with evidence of 40 CPE credits).

For persons who practiced during the lapse of license:

- \$565 reinstatement fee for each year lapsed.
- Late fees: \$150 late fees for the first three months and \$50/month during the first lapsed year, and \$100/month during the second lapsed year, and evidence of 40 CPE credits for every CPE cycle (all accumulated CPE requirements must be completed).

If the license lapsed for two years or more, your license cannot be reinstated until the SBoA reviews your case.

For persons who did not practice accountancy but still used the title CPA:

- \$565 reinstatement fee for each year lapsed.
- Late fees will be 10% of all back license fees.
- Must provide evidence of 40 CPE credits earned in the last 12 months.

We will keep you informed as this proposal progresses and send a member alert once the changes become final.

Facilitated State Board Access

It has been requested that Department of Consumer Protection (DCP) staff get Facilitated State Board Access (FSBA) through the AICPA to review peer review filings to ensure they have been submitted correctly. The DCP has access to the software and will complete the necessary training to familiarize themselves with the system.

Uniform Accountancy Act (UAA) Model Rule Revisions

Several changes were made to the UAA in 2020. Connecticut has adopted some changes but is not in complete alignment yet.

In July, the National Association of State Boards of Accountancy (NASBA) spoke with the SBoA about some of the changes, what NASBA's focus is right now, and matters they think should be on the Connecticut SBoA's radar screen, including:

- **Accreditation:** NASBA emphasized board staff reviewing transcripts and ensuring that the language referencing the accrediting bodies is accurate and up-to-date.
- **Specific Accounting Coursework:** NASBA shared the changes with actual classes required and internship hour modifications.

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— Sal Giuliano, Managing Director
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Public Company Accounting Oversight Board Proposes a New Quality Control Standard

Comments due by February 1

The Public Company Accounting Oversight Board (PCAOB) issued an exposure draft for public comment that it believes would, if adopted, lead registered public accounting firms to improve their quality control (QC) systems significantly.

The PCAOB requests public comment on the proposal (available at www.ctcpas.org/QC) by February 1, 2023. Please submit your comments to the PCAOB and copy advocacy@ctcpas.org.

Current QC standards were developed and issued by the AICPA before the PCAOB was established in 2002. The auditing environment has changed significantly since that time, so QC is a pressing area for modernization.

The proposed standard, if adopted, would replace the current QC standards in their entirety and would provide a framework for a firm's QC system that is grounded in proactively identifying and managing risks to quality, with a feedback loop from ongoing monitoring and remediation designed to drive continuous improvement.

The proposal would foster a more structured approach where a firm would annually evaluate its QC system and report the results of its evaluation on new Form QC.

View the proposal at www.ctcpas.org/QC.

Please submit your comments by February 1, 2023 to the PCAOB and copy advocacy@ctcpas.org.

State Unemployment Taxes Cut to Offset Increased Federal Unemployment Tax Act (FUTA) Taxes

News from the Connecticut Department of Labor

Trust Fund and Pandemic Borrowing

The Connecticut Unemployment Insurance Trust Fund had a balance of approximately \$700 million prior to the COVID-19 pandemic. According to the formula outlined within the Connecticut General Statutes, the Trust Fund needed \$1.4 billion to be considered solvent.

Due to the impact of the COVID-19 pandemic and the depth of the economic recession, the Trust Fund was depleted in August 2020.

As a result, the Connecticut Department of Labor (CTDOL) began borrowing funds from the United States Department of Labor to continue paying state UI benefits. As of November 30, 2022, CTDOL has borrowed approximately \$1 billion and has a loan balance due to the U.S. Department of Labor of \$76 million.

The Impact of Borrowing on Employer Federal Tax Rates

One of the federal statutory mechanisms for repaying outstanding federal loans is through increased Federal Unemployment Tax Act (FUTA) taxes. Each state that has federal loans outstanding for at least two consecutive years subjects their employers to increased FUTA taxes each year until all loans are paid in full. The payments from FUTA tax increases are applied directly to that state's outstanding federal loan balance.

As Connecticut has an outstanding loan balance, Connecticut employers will have a FUTA tax increase of 0.3%, applied to payroll paid from January 1, 2022 through December 31, 2022 – up to \$21 per full-time employee. The calendar year 2022 FUTA tax return payments will be due and payable in January 2023.

Connecticut Reduced State Tax to Mitigate Federal Increases

To mitigate the impact of the FUTA tax increase to employers, the Connecticut Legislature passed Public Act 22-118, which contains a provision reducing the state unemployment tax rates by 0.2% for calendar year 2023.

This state unemployment tax rate reduction lessens the impact of the FUTA tax increase for those that are paying State Unemployment Tax Act (SUTA) in 2023.

Public Act 22-118 creates a temporary reduction of 0.2% in the state's new employer and fund solvency tax rates for calendar year 2023 only.

All employers (new and existing) will see a 0.2% reduction in their calendar year 2023 tax rate:

- The state's new employer rate, originally 3.0% for 2023, is reduced to 2.8%.
- The fund solvency tax, originally 1.4% for 2023, is reduced to 1.2%.



Filling the Pipeline

Finding and retaining talent is a major concern across the profession. A strong and diverse pipeline of students entering the profession is imperative to future success and growth.

CTCPA has developed several programs to help engage the next generation and make sure they're aware of all the opportunities accounting and finance careers have to offer.

From reaching high school students through member speaking engagements at their schools and field trips to our popular Accounting Is My Major (AIM) programs at Connecticut Colleges, to college visits and our Interview Day event matching top college accounting majors with companies seeking interns and new hires, the fall was a busy and exciting time for the next generation of accounting professionals.

Accounting Is My Major (AIM) Programs Bring High School Students to Connecticut Colleges

Our Accounting Is My Major (AIM) programs returned this fall, bringing high school students from across the state to Connecticut colleges and universities.

Participants heard from college faculty and students as well as those working in the profession about all of the opportunities an accounting degree and the CPA designation can bring.

Thank you to **Quinnipiac University**, the **University of Connecticut**, and the **University of Hartford** for welcoming students and hosting these programs.

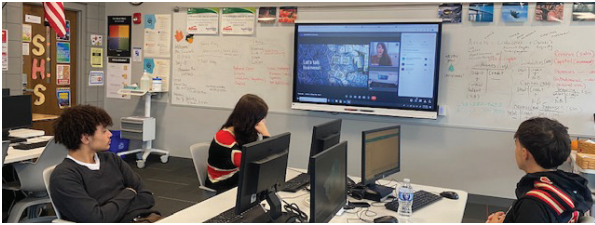


Promoting the Profession at College Career Fairs

CTCPA staff headed to college career fairs around the state this fall, providing students with materials including our *Becoming a CPA in Connecticut* guidebook and career information from our joint partnership with the American Institute of CPAs (AICPA).

We've also launched a new student member benefits handout available at www.ctcpas.org/Students.





Jayme Lynn White of *Rolleri & Sheppard CPAs, LLP* speaks at *Stratford High School*



Matthew Piechota of *Cheshire Academy* speaks at *Cheshire High School*



Michael Maksymiw of *Aprio Firm Alliance* speaks at *Southington High School*



Jonathan Comer and Thomas Comer of *Comer & Company* speak at *Nathan Hale-Ray High School*



Members Visit Classrooms as Governor Proclaims Nov. 7-11 Accounting Opportunities Week

Governor Ned Lamont declared November 7-11 as Accounting Opportunities Week in Connecticut. As part of a nationwide initiative, we joined forces with the American Institute of CPAs (AICPA) and other state CPA associations. Our goal? Get members into as many classrooms as possible to share their stories and career paths and inspire tomorrow's CPAs – now.

Thank you to these members who spoke to high school students about their careers and the profession:

Jayme Lynn White of *Rolleri & Sheppard CPAs, LLP*
Stratford High School

Matthew Piechota of *Cheshire Academy*
Cheshire Academy and *Cheshire High School*

Michael Maksymiw of *Aprio Firm Alliance*
Southington High School

Ben Maini and **Chris Montefiore** of *Reynolds + Rowella*
Masuk High School

Cynthia Calderón of *CohnReznick*
Warren Harding High School

Mary Manfredi of *General Dynamics Electric Boat*
Robert E. Fitch Senior High School

Muhammad Malloy of *CohnReznick LLP*
Grasso Technical High School

Jonathan Comer and **Thomas Comer** of *Comer & Company*
Nathan Hale-Ray High School

Ryan Sheppard of *Rolleri & Sheppard CPAs, LLP*
Fairfield Ludlowe High School

CPA Career Pathway Videos Your path. Your journey. Your CPA Career.

These new videos help students explore different career paths, find out what CPAs really do, and discover where an accounting career can take them.

The message to students is simple: Every business needs a CPA. No matter what you're into, there's a CPA for that.

There is a full version of the video (about 10 minutes) as well as a shortened version (about 4 minutes). We've also posted a short video about why diversity is vital to the profession.

The videos are available on our website at www.ctcpas.org/Careers as well as on YouTube, Facebook, Twitter, Instagram, and LinkedIn @ConnecticutCPAs.

Please view and share these videos, both on your own social media and with interns or others who would benefit from a better understanding of the opportunities the accounting career path provides.



CTCPA INTERVIEW DAY 2022



Largest-Ever Interview Day Hosts 225 Job/Internship Interviews

The CTCPA hosts Interview Day each fall, bringing top accounting students together with hiring companies for a day of interviews. Interview Day 2022 was our biggest event yet, with 28 companies interviewing 48 students for a total of 225 individual interviews in one day. Thank you to all who participated!

Thank you to the following companies for joining us:

Accounting Resources Inc.

Adams Samartino & Co., P.C.

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Bailey, Moore, Glazer, Schaefer & Proto, LLP

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

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PKF O'Connor Davies

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Reynolds + Rowella LLP

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The Innovative CPA Group, LLC

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UHY LLP

Whittlesey PC

Thank You, 2022-2023 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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TechConneCT Roundtables

These roundtable meetings are designed to help all members with virtual work, software, and anything else you're dealing with technology-wise.

Thursday, February 16 • 9 - 10:30 a.m. • Online
Thursday, May 18 • 9 - 10:30 a.m. • Online
Thursday, August 17 • 9 - 10:30 a.m. • Online



State Tax Committee Meeting

Tuesday, January 17 • 9:00 - 10:30 a.m. • Online

This group navigates the political, regulatory, legislative, and judicial details of Connecticut tax compliance. Members meet frequently with legislators and officials from the Connecticut Department of Revenue Services. The group has a very widely used CTCPA Connect online community where members ask questions, share ideas, and offer solutions to tough problems.



Federal Tax Committee Meeting

Thursday, January 12 • 8:30 - 9:30 a.m. • Online

We welcome those with an interest in federal tax, no matter your career stage or level of expertise. This group of tax professionals works together to educate our members on changes and nuances of federal tax laws and/or regulations affecting individuals, corporations, and pass-through entities.



Trust, Estate & Gift Taxation Committee Meeting: Charitable Trusts

Thursday, January 19 • 9:00 - 10:00 a.m. • Online • CPE: 1

This Trust, Estate, and Gift Tax Committee meeting will feature **Brianna Marquis, Esq.** from Cummings & Lockwood. She will discuss charitable trusts such as CRTs, CLTs, information on foundations, and donor-advised funds.

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CTCPA Connect is our private online community where you can ask and respond to questions, collaborate, and share with fellow members.

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Accounting, Auditing, & Financial Reporting Committee

Discuss exposure drafts and enhance relationships with standard-setters.

Contact: *Cindy Panioto* • cindyp@ctcpas.org



Bylaws Committee

Each year a group of members are assembled to serve on the Bylaws Committee. *Membership by CTCPA chair appointment.*

Contact: *Bonnie Stewart* • bonnies@ctcpas.org



NEW!

Cannabis Committee

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

Contact: *Lisa Bugryn* • lisab@ctcpas.org



COMING SOON!

Client Advisory Services

Collaborate on this fastest-growing part of most audit and advisory practices.

Contact: *Bonnie Stewart* • bonnies@ctcpas.org



Company Administrators Group

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

Contact: *Liz Frazza* • lizf@ctcpas.org



Diversity, Equity, Inclusion, & Access Initiative

Promote diversity and inclusion within the profession and at our organizations.

Contact: *Jennifer Cooley-Brewer* • jenniferc@ctcpas.org



Educators FOOD Group

Discuss hot topics in this candid, conversational group.

Contact: *Alyssa Boerenko* • alyssab@ctcpas.org



Employee Benefit Plans Committee

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

Contact: *Lisa Bugryn* • lisab@ctcpas.org



NEW!

Environmental, Social, and Governance (ESG) Committee

Discuss sustainability reporting, disclosures, and more.

Contact: *Cindy Panioto* • cindyp@ctcpas.org



Fairfield County Chapter

Meet for networking and educational events in Fairfield County locations.

Contact: *Cindy Panioto* • cindyp@ctcpas.org



Federal Taxation Committee

Discuss issues and build relationships with legislators and regulators.

Contact: *Cindy Panioto* • cindyp@ctcpas.org



Finance Professionals in Industry Group

Explore regulatory, compliance, and management issues.

Contact: *Cindy Panioto* • cindyp@ctcpas.org



Financial Institutions Committee

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

Contact: *Alyssa Boerenko* • alyssab@ctcpas.org



Golf Committee

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

Contact: *Liz Frazza* • lizf@ctcpas.org



Governmental Accounting & Auditing Committee

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

Contact: *Lisa Bugryn* • lisab@ctcpas.org



Investment Committee

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

Contact: *Bonnie Stewart* • bonnies@ctcpas.org



Membership Committee

Recruit new members and ensure that membership is a rewarding experience.

Contact: *Cindy Panioto* • cindyp@ctcpas.org



New & Young Professionals Cabinets

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

Contact: *Cindy Panioto* • cindyp@ctcpas.org



Not-for-Profit Organizations Committee

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

Contact: *Liz Frazza* • lizf@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



Professional Ethics

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

Contact: *Lynette Lindner* • lynettel@ctcpas.org



Southeastern CT Chapter

Meet in locations across Southeastern Connecticut.

Contact: *Bonnie Stewart* • bonnies@ctcpas.org



State Taxation Committee

Navigate the regulatory and legislative aspects of Connecticut tax compliance.

Contact: *Cindy Panioto* • cindyp@ctcpas.org



TechConneCT Roundtable

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

Contact: *Cindy Panioto* • cindyp@ctcpas.org



Valuation, Forensic, & Litigation Support Group

Connect on legal considerations, witness reports, testimony, and more.

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CTCPA Women's Awards

Celebrating Connecticut's exceptional female CPAs

Wednesday, January 18, 2023 • TPC River Highlands, Cromwell

The fourth annual CTCPA Women's Awards program returns to the beautiful TPC River Highlands on January 18, 2023 to recognize the many contributions female CPAs are making in Connecticut.

This year, eight outstanding women will be honored in two categories: Distinguished Service and Women to Watch.

The winners represent a diverse group of Connecticut women, from public accounting to education to an independent trustee. Read more about their contributions to the profession in the pages that follow.

Keynote speaker **Heather Lavallee**, who takes over the reins of Voya Financial as CEO on January 1, will inspire with her story of climbing the ladder, while emcee **Renee DiNinno**, renowned iHeartRadio personality, leads us in the festivities.

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There's still time to join us at the event!
Register at www.ctcpas.org/CTCPAWomen.

Wednesday, January 18, 2023 • TPC River Highlands

Registration and networking: 7:30 - 8:30 a.m.

Breakfast: 8:30 - 9:00 a.m.

Keynote speaker and awards: 9:00 - 10:15 a.m.

Member price: \$45 • Non-member price: \$55



Distinguished Service Award

Isabelle V. Curtiss, CPA/PFS

Isabelle V. Curtiss, P.C., CPA

Isabelle is the owner of Isabelle V. Curtiss, P.C., CPA. As both a CPA and a Personal Financial Specialist (PFS), she has amassed a long list of accolades throughout her career. A former CTCPA Board member, she served as a member of or liaison to many committees, and was founder of the CTCPA Personal Financial Planning Committee.

What inspired you to pursue the CPA career path?

When I chose the CPA career path, I wanted to assist clients beyond tax and accounting. Working as a professional with credentials, I felt I could assist in a meaningful way with a combination of cash flow, budgeting, tax, investments, retirement, estate, and trust advice. I provide a complete service on behalf of clients.

What professional accomplishment are you most proud of?

When I was on the CTCPA Board, I advised that the organization consider adding Personal Financial Planning (PFP) as a technical committee. This was achieved, along with the PFP Conference. I received the CTCPA Annual Service Award for my work. On the AICPA PFP Board I chaired the

PFP Exam. For my work with the AICPA, I also received the Distinguished Service Award. I was the first woman to receive this award.

What is your next major goal?

I plan to continue my all-encompassing planning on behalf of clients. I will continue to give to my community and my world for all of the blessings I have realized during my career as a CPA/PFS.

What is your favorite thing to do outside of work?

To play my Steinway piano. I love music. To garden. I manicure 18 gardens on my home's three acres of land. I am an avid sports fan and have a game room to feel my love for the Yankees, Patriots, and tennis.



Distinguished Service Award

Jeanna M. Doherty

Ernst & Young LLP

Jeanna is a partner at Ernst & Young LLP (EY), where she has worked since graduating from college 28 years ago. She is the firm's Americas Assurance Operations Leader. She works with assurance leadership on planning, budgeting, talent, and process optimization. She also serves as coordinating partner for health clients and leads the firm's assurance audit environmental efforts, helping more than 800 audit clients prepare for proposed new SEC rules on climate disclosures.

What inspired you to pursue the CPA career path?

Accounting was a natural fit for me. I took a bookkeeping class in high school, not knowing anything about this field. My parents, who didn't attend traditional college, gave me the well-meaning advice to study business, so I did. My teacher and first mentor encouraged me to look into an accounting major in college. When I did, I was drawn to the client-service aspect and working with teams. The path unfolded for me and, along the way, I had great mentors and sponsors who guided my career.

What professional accomplishment are you most proud of?

I am proud to be a role model to women. I was the first woman promoted to partner in Hartford while raising a family. It sets the stage for women's advancement. I have been able to demonstrate to my teams that with work and life, everything can fit in, when and where it needs to. When younger-generation women come to me for advice, I have been able to help them see a way through the challenge. Instead of looking for

elusive balance, I encourage teams to embrace what professional life could be at each stage of their career.

What is your next major goal?

My next major goal is to continue working with our young recruits and our diversity and inclusiveness teams to make sure everyone has the opportunity to thrive and to find their calling, and that their work can allow for different paths of expression and fulfillment. I am working with our leadership teams to advance the firm's position in the market, in an environment where trust and transparency cannot be overrated. My next goal is related to what drew me to this profession in the first place, service to others and collaborating with clients.

What is your favorite thing to do outside of work?

I adore my family and enjoy spending time with my two teenage daughters. I see them as the strong women they are becoming. We recently traveled to Chicago to attend a Harry Styles concert together. I enjoy traveling and attending sporting events with my kids and Adam, my husband of 21 years.



Distinguished Service Award

Kimberly Napp, CPA Whittlesey

Kimberly is a partner in the Audit Department at Whittlesey, concentrating on nonprofits and credit unions. She co-founded and co-chairs the firm’s women’s leadership group, Women of Whittlesey (WoW), and is the firm’s Quality Control Director. She is also a member of the Greater New Haven Chamber of Commerce Nonprofit Resource Council.

What inspired you to pursue the CPA career path?

My father owned a music store and let me perform small bookkeeping tasks; I was immediately hooked. This led me to take accounting courses in high school and pursue a degree in accounting. In college, I realized that accounting was much more than numbers. It is about relationships and finding ways to help your clients achieve their goals.

What professional accomplishment are you most proud of?

From the day I started working in public accounting, I knew I wanted to be a partner at Whittlesey. I worked toward this

goal and was promoted to partner in January 2019.

What is your next major goal?

I plan to continue to mentor women at my firm to succeed in leadership positions and reach their potential.

What is your favorite thing to do outside of work?

My number one favorite thing is spending time with my son, Alexander. Work-life integration is essential. I also love visiting with the rest of my family and friends, attending concerts and Broadway plays, and reading.



Distinguished Service Award

Teresa S. Polley SSGA Select Sector SPDR Trust

Teresa currently serves as Independent Trustee and Audit Committee Chair for SSGA Select Sector SPDR Trust, an ETF complex of 11 funds covering the sectors of the S&P 500. She also serves on not-for-profit boards, including her alma mater, Saint Francis University in Loretto, Pennsylvania, and Girl Scouts of Connecticut. She also serves on the CTCPA Investment Committee.

What inspired you to pursue the CPA career path?

I owe the beginnings of my career to my Accounting 101 professor, Mr. Monborne. A practicing CPA and auditor, he made accounting interesting and fun – it clicked for me and I was hooked. Mr. Monborne advised me to pursue a career with the Big 8, at least initially, and to pass the CPA Exam, and from there the career path could lead almost anywhere. He was so right! I started my career with Arthur Andersen & Co. in their Stamford office.

What professional accomplishment are you most proud of?

I like a quote from Madeleine Albright, who said about her career path, “I was never supposed to be what I became.” Serving as the President and CEO of the Financial Accounting Foundation (FAF) was a major highlight of my career – and not a likely outcome, given that I was passed over for the role in 2005 before being appointed in 2008. As FAF President

and CEO, I had the privilege to engage with and learn from smart, talented people of integrity throughout the profession.

What is your next major goal?

I would like to continue to grow and give back. I am thoroughly enjoying my board service, which is challenging and invigorating. It keeps me on my toes! And my not-for-profit work is especially gratifying, particularly the opportunities to mentor younger women on their career or educational path.

What is your favorite thing to do outside of work?

Since 2021, we’ve lived adjacent to our son John and daughter-in-law Catherine in Sandy Hook. We have created an extended family compound of almost 40 acres that includes Catherine’s mom and her aunt and uncle. We love to spend time – lots of it outdoors – with family, plus the 30+ alpacas, five emus, chickens too numerous to count, three Great Danes, and two dogs of the “rescue” breed.

Distinguished Service Award



Noelle A. Taddei, CPA, MST

Educator, Accounting Coach, and Career Advocate

Noelle's professional life today evolved from a varied journey as a CPA in public accounting, Fortune 100 corporate, and education. She now combines her passion with her experiences and shares them as a college professor, career advocate, and accounting coach for the Travelers EDGE (Empowering Dreams for Graduation and Employment) program.

What inspired you to pursue the CPA career path?

Like many others, it was the "who" – my dad Edward, also a CPA and enthusiast for the profession.

What professional accomplishment are you most proud of?

I am most excited (and proud) any and every time a student, for whom I have been fortunate to advocate, accomplishes their internship and career goals.

What is your next major goal?

I would like to consult with academic organizations and employers on how to implement an individualized approach to identification of accounting talent, with the focus on advocating for candidates through successful placement in the accounting profession.

What is your favorite thing to do outside of work?

I love to explore the U.S. by road travel, touring American manufacturing facilities, while coordinating visits with family and friends.

Distinguished Service Award



Amber D. Tucker, CPA

FML CPAs

Amber is a partner with FML CPAs, a regional accounting firm headquartered in Glastonbury, where she leads the Not-for-Profit Assurance and Tax practice alongside colleague Brian Kelleher. Amber helps guide the team of 20 professionals as they develop the skills necessary to best serve not-for-profit clients in all their accounting and advisory needs.

What inspired you to pursue the CPA career path?

I was initially inspired by my high school accounting class, which taught me basic t-account accounting – debits and credits. I loved it from day one. I still remember being excited about the projects, class work, and homework, especially those that featured real-life examples. Cost accounting in college helped me understand that manufacturing accounting wasn't for me; I stuck with my love and appreciation for not-for-profits.

What professional accomplishment are you most proud of?

I joined FML CPAs in 2017, and our not-for-profit practice has doubled in size since 2019. I have attended as many networking events, conferences, and lunches as I could in order to continue to grow FML's name recognition and my practice specialty. Due to my efforts and our client growth, I was named partner in January 2022. Making partner was a goal for me from the start, right out of college. I knew early that my career trajectory needed to aim for the position to satisfy my intrinsic drive and to best serve the clients I so value.

What is your next major goal?

Having just attained my goal of partner in January 2022, I am still enjoying the moment, which I think is key. Ensuring I enjoy my success after diligently working for 17 years to "make it" has thus far been really affirming! My next goal is on the horizon to be set.

What is your favorite thing to do outside of work?

I love spending time with my family and community! We have an active family life with three children; we are usually attending multiple sporting events from soccer and basketball to baseball and softball every weekend.

During the summers, we enjoy a bit of down time camping locally, and making time for beach vacations and other local adventures. I'm also active as a volunteer in my local community and church, a board member of The Fund of Greater Hartford, and I was elected to our hometown Board of Education in 2021, a position I am honored to hold.

Women to Watch Award



Melissa Braun, CPA Whittlesey

Melissa is a Manager in the Whittlesey Tax Department, providing tax and consulting services to commercial, residential, and affordable housing real estate entities, financial institutions, construction, manufacturing and closely held businesses, and high-net-worth individuals.

What inspired you to pursue the CPA career path?

My mom inspired me to pursue the CPA career path. As I grew up, watching her enjoy her job so much inspired me to take a couple accounting classes when I started college. After that, I was hooked. She encouraged me to pursue becoming a CPA.

What professional accomplishment are you most proud of?

I've enjoyed sharing my experiences, knowledge, and love for the industry with the people I've been able to mentor and coach along the way, whether they have stayed working with us or left to pursue different opportunities. It has been really fun to watch their progress.

What is your next major goal?

My next major goal is to make partner at Whittlesey.

What is your favorite thing to do outside of work?

My favorite thing to do outside of work is crafting projects, specifically knitting and crocheting.

Women to Watch Award



Alina Macchia Deloitte & Touche LLP

Alina is an Audit & Assurance Senior Manager at Deloitte & Touche LLP ("Deloitte"), with more than 11 years of experience serving large public and private clients within Deloitte's financial services group in Connecticut. She specializes in the banking and capital markets and investment management industries. In addition, she is active in many other activities such as facilitating technical trainings, serving as a coach to several mentees, and co-chairing Deloitte's Talent Advisory Council in Stamford.

What inspired you to pursue the CPA career path?

I chose accounting because of the diverse opportunities that exist throughout a career in accounting, even when just starting out. I've been fortunate to take advantage of many of these opportunities, both through client service and working in Deloitte's national office. It's been great to work with strong mentors, other professionals, and clients who have helped me grow.

What professional accomplishment are you most proud of?

I am proud that in addition to my client service responsibilities, for three years I held a role in Deloitte's National Office Monitoring Group, supporting engagement teams undergoing PCAOB broker-dealer inspections.

What is your next major goal?

My next goal is to become a leader at Deloitte & Touche LLP and in the profession and to continue to make an impact that matters for both our profession and in the marketplace.

What is your favorite thing to do outside of work?

I like to spend time with my husband and two daughters. We love to travel and enjoy beach vacations.



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Can a Password App Make Your Life Easier and Increase Security?

By Mark R. Torello, CPA, CITP, CRISC, CFE, CISA, Partner-in-Charge, Whittlesey Technology Member, CTCPA Technology Committee and CTCPA IT Governance Group

In the field of cybersecurity, most things we do to increase security have an equally significant “opposite” effect on productivity. Simply put, they make your life harder.

That’s because we cybersecurity professionals need to put hurdles in the way of the attackers to stop them – or at least slow them down. Many systems require long, complex passwords that must be changed frequently. This can really make life harder for users when we can’t remember our credentials or even get locked out of our systems.

Then there’s multifactor authentication, where users must prove who they are using more than just a username or password – such as confirmation through a phone app, an additional code entered, or a fingerprint or face ID.

These safeguards are imperative to protect our online systems, but can be a hassle and slow down users.

Challenges with passwords.

Why are passwords so challenging? One reason is that every system has its own rules for what constitutes an acceptable password. Some require uppercase and lowercase letters, some require a number and a special character, while others just want a number.

Then there are the systems that track the last password you used and won’t let you re-use it. Blasphemy! When you say “I forgot my password,” it allows you to reset it but forces you to change it again ... adding yet another

iteration of your favorite word. Yet this password is no harder to be cracked than the last word you used even with adding a number and special character like *1 after it. We may think we’re being crafty, but it’s not making things any harder for the hackers!

Why do passwords get compromised so often?

The simple answer is that businesses that are responsible for the safe-keeping of your credentials are not doing enough to adequately protect them. Once they are compromised, login credentials are sold quickly. That means that other websites and systems you use those credentials for can also become compromised. This is the reason you should not use the same password for more than one online system. That is challenge number one.

Other top difficulties include:

- Remembering complex passwords.
- Remembering many different passwords.
- Accessing saved passwords that are not always available on all of your devices.
- Deciding where to save your passwords. Web browsers? Contacts? Sticky notes? Notebooks?

The risk with the current password convention.

In the past, we would all select a password plus a required number and capital letter. So if I liked summer, I might select “Summer2022.” This would clear the requirements of “complexity” rules

built into most systems. But as you can see, it’s not the strongest password by far. And on the next password change mandate, there’s a good chance you might change that to “Summer2023.” That’s not any more secure in the eyes of a hacker.

Use a passphrase instead!

Password hacking systems look for dictionary words first and then append numbers to them in an automated approach that is very quick. Once all dictionary words with numbers are exhausted, the process of “brute-forcing” a password made up of multiple words (called a “passphrase”) can take a long time – even centuries!

For that reason, the process of putting more than one word together into a passphrase has been determined by the National Institute of Science & Technology (NIST) to be much more secure than the best complex password plus numbers/characters. *NIST Special Publication 800-63B* (June 2017 but updated through 2020) introduced this concept with other unexpected changes in guidance on digital identity.

The most surprising change in guidance was NO requirement to change passwords/passphrases unless the credentials were involved in a compromise. [Note: This author’s guidance is to still change passwords/passphrases annually in case a compromise in another system is missed. This is still much easier than changing it every 60 or 90 days.]

Have questions about this or other tech topics?

Get peer-to-peer advice at our TechConneCT Roundtables!

CTCPA TechConneCT Roundtables, offered quarterly, are a great place to learn about important tools like these and other technology.

This is a valuable resource for CTCPA members to get their technology and cybersecurity questions answered and discuss what solutions work for fellow members.

Recent discussions include moving to the cloud, selecting tax and audit software, payroll and HR technologies, and much more.

Register for the next meeting at www.ctcpas.org/MemberMeetings.

Why did NIST make this change? Because changing passwords every 90 days just makes it more challenging for us to remember our passwords, so we end up doing foolish things like putting our credentials on a sticky note on our desks or making them too simple.

Thou shalt not share thy passphrase!

Certainly, you understand the importance of not sharing passwords or passphrases with others. It's a big no-no for several reasons. Lack of audit trail is one. **You should also not share that same passphrase between online accounts either.** This is where it gets rough! How are you supposed to remember so many unique passphrases and which account they belong to?

The answer to all these challenges and requirements? The password manager!

Password managers are a unicorn in the security world. They are one of the very few systems that help improve productivity and make your life easier while also increasing cybersecurity.

Here's how using a password manager addresses challenges:

- **Remembering long passphrases** – A password manager can save them so you don't forget them and don't get locked out.
- **Using unique passphrases for each online system** – A password manager can help you keep them organized and speed up the process by logging you into each site automatically.
- **Sharing certain company-level login credentials with staff** – A password manager can make this happen securely without divulging the actual passphrase with staff.
- **Logging into various sites between phone and computer** – A password manager makes this quick and seamless by working on multiple devices.

How to get started.

It's important to start protecting your accounts, pocketbook, and credit rating today. The first step is to stop using all the unsecure means of storing and remembering your passwords and installing a good password manager. You will be surprised at how fast it is to learn how to use it and how quickly it can make your life easier and more secure at the same time.

While there are many good options, the leaders in the industry include:

- **Lastpass** (author's choice) – \$36 per year
- **Roboform** – \$24 per year, \$48 per year for a five-user family plan
- **Dashlane** – \$6.49 per month (\$60 per year)
- **1Password** – \$3 per month (\$36 per year, \$60 per year for families)
- **NordPass** – \$36 per year

All have free versions (not just trial versions) that limit the product functionality. These free versions are a great way to get to know the product by actually using it for a while. Once you're ready to take the full plunge, upgrades are typically easy.

I like LastPass's feature of having one login that gets me access to my free personal account as well as our paid business account (enterprise account)

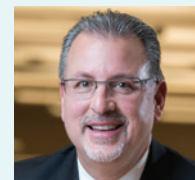
with company passwords in it, all while keeping them completely separate from each other. I also like how I can share passphrases to different groups of staff in the office.

Selection tips:

- Make sure the password manager you select has an app that works well with your phone and other devices.
- See if the product has an enterprise version that provides more benefits in a business environment.
- Do your vendor due diligence and request their Service Organization Control (SOC) 2 Type 2 report. Ask your IT vendor to help you review it if necessary. Pay attention to the "User Entity Control Considerations."

Use tips:

- Download the plugin that works with your favorite browser (e.g. Google Chrome). This will help achieve login efficiencies.
- In your browser settings, disable the "Prompt to Save Passwords." Once you have all of your credentials in your new password manager, delete the passwords in the browser.
- Download the app for your mobile devices and configure them to use it.
- All good products will offer two-factor authentication – be sure to enable it during your initial setup.



Mark R. Torello, CPA, CITP, CRISC, CFE, CISA is the Partner-in-Charge of Whittlesey Technology, one of

the region's most sophisticated cybersecurity and technology consultancies. Since 1997, Whittlesey Technology has provided CPA firms with managed technology support, cybersecurity, and accounting system services.

Mark is a long-time member of the CTCPA Technology Committee and offers up advice at the group's TechConneCT Roundtables (see the sidebar on this page for more). He is also a member of the CTCPA IT Governance Group. Mark can be reached via email at mtorello@wadvising.com.

Webinars

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

Date	Title	Member/ Nonmember	CPE Hours	Express Code
> Accounting and Auditing				
1/16	FASB ASC 842, Leases: A Deep Dive into Implementation Issues	\$79/\$114	2	CPX31627
1/17	SAS 134: Exploring the New Audit Report	\$49/\$69	1	CPX28700
1/18	Accounting & Auditing Update	\$129/\$159	4	ACP08816
1/20	Your Guide to Quality Account Reconciliations	\$79/\$114	2	CPX28304
1/23	Financial & Tax Accounting for S Corporations & Partnerships	\$199/\$324	8	CPX30648
1/27	Shorten Month-End: Closing Best Practices	\$139/\$204	4	CPX29785
1/31	Risk Assessment: The Foundation of an Audit of a Live Event	\$79/\$114	2	CPX30516
2/4	Deep Dive Common Auditing Deficiencies	\$129/\$159	4	ACP09122
2/7	Surgent's Basics of the Valuation of a Closely Held Business	\$159/\$224	4	BVA40207
2/10	Surgent's Guide to the Topic 606 Revenue Recognition Model for All CPAs	\$159/\$224	4	REV40210
2/13	Accounting for and Auditing Cryptocurrency & Digital Assets	\$79/\$114	2	CPX30137
2/14	Common Financial Statement Disclosures	\$79/\$114	2	CPX30279
2/15	Surgent's Going Concern Accounting and Reporting Considerations in the COVID-19 Environment	\$99/\$134	2	AGC20215
2/22	Surgent's Revenue Recognition for Long-Term Construction and Similar Contracts: Topic 606 Implementation Challenges	\$159/\$224	4	LTC40222
> Business Management and Organization				
1/23	Aligning Budgets to Strategy: The Key to Long-Term Profit	\$79/\$114	2	CPX29732
2/6	Monetize Your Knowledge as an Accounting Influencer	\$139/\$204	4	CPX28756
> Communications and Marketing				
1/16	Build Your Professional Practice: Effective Selling Skills	\$49/\$69	1	CPX29867
1/31	Podcasts: How To Market Your Expertise to Get More Clients	\$49/\$69	1	CPX31457
2/14	LinkedIn Profile Secrets for CPAs	\$79/\$114	2	CPX30527
> Computer Software and Applications/Information Technology				
1/16	K2's Options To Automate Your Tax Preparation Workflow	\$79/\$109	2	ACP08789
1/21	K2's Technology for CPAs – Don't Get Left Behind	\$225/\$275	8	ACP08871
2/3	K2's Microsoft Teams	\$129/\$159	4	ACP09110
2/7	Power BI: Prepare Your Data Efficiently for Excel Analysis	\$79/\$114	2	CPX28886
2/14	K2's Microsoft Office 365: All the Things You Need to Know	\$225/\$275	8	ACP09276
> Ethics				
1/19	Surgent's Ethical Considerations for the CPA	\$159/\$224	4	ETHC0119
2/6	Ethics: What a CPA in Business & Industry Needs to Know	\$79/\$114	2	CPX31214
2/16	Financial Decisions that Led Two Businessmen to Prison	\$79/\$114	2	CPX28728
> Finance				
1/23	K2's Excel Financial Modeling Best Practices	\$79/\$109	2	ACP08897
2/1	Debt or Equity: Which Will Your Organization Need Next?	\$79/\$114	2	CPX31119
2/15	Cash Conversion Cycle: Tools and Techniques	\$79/\$114	2	CPX29674

Date	Title	Member/ Nonmember	CPE Hours	Express Code
> Governmental Accounting/Auditing				
1/21	Common Yellow Book & Single Audit Deficiencies	\$129/\$159	4	ACP08873
1/28	Not-for-Profit Accounting & Auditing Update	\$129/\$159	4	ACP08994
2/7	Governmental GAAP Update	\$79/\$109	2	ACP09161
2/17	The Impact of SAS No. 145 on Risk-Based Audits	\$79/\$114	2	CPX30368
> Information Technology				
1/18	Non-Fungible Tokens (NFTs) – Implications for Practitioners	\$49/\$69	1	CPX31977
1/26	Robotic Process Automation (RPA) for Accountants	\$79/\$114	2	CPX31021
2/2	Cybersecurity 101 for CPAs	\$79/\$114	2	CPX29367
2/18	K2's Artificial Intelligence For Accounting And Financial Professionals	\$129/\$159	4.6	ACP09364
> Specialized Knowledge				
1/19	2022-2023 Workplace Law Updates for CPAs	\$39/\$59	1	ACP08829
2/1	Bitcoin Fundamentals: What Every CPA Should Know	\$99/\$149	3	CPX28828
2/28	Legal Planning for Care Giving of Elderly/Disabled Clients	\$39/\$59	1	CPX31335
> Taxes				
1/16	ACPEN Signature: 2022 Annual Tax Update	\$250/\$300	8	ACP08775
1/17	Surgent's Fiduciary Income Tax Returns: Form 1041 Workshop with Filled-in Forms	\$279/\$404	8	10410110
1/19	Surgent's Federal Tax Update	\$159/\$224	4	BFT40119
1/20	Surgent's Getting Ready for Busy Season: Review Individual Tax Form Changes	\$99/\$134	2	ITFC0120
1/25	2022 Business Tax Update with Doug Van Der Aa	\$129/\$159	4	ACP08918
1/26	Surgent's Technical Individual Practice Issues and Tax Forms for Experienced Practitioners	\$279/\$404	8	ATFI0126
1/27	Surgent's Section 754 Step-Up in Basis: Understanding the Tax Issues for Partnerships and LLCs	\$99/\$134	2	S7540127
1/31	Surgent's Successfully Completing an Income Tax Return for a Trust or Estate: Form 1041	\$99/\$134	2	FM410131
2/1	How to Deduct Travel, Meals, & Entertainment Expenses NOW	\$129/\$159	4	ACP09067
2/3	Surgent's Fiduciary Income Tax Returns: Form 1041 Workshop with Filled-in Forms	\$279/\$404	8	10410203
2/6	Monthly Federal Tax Update – February 2023	\$79/\$114	2	CPX28063
2/8	Criminal Tax For Accountants	\$79/\$114	2	CPX30054
2/9	Surgent's Successfully Completing an Estate Tax Return: Form 706	\$99/\$134	2	F7060209
2/14	Partnerships: How to Calculate Partner Basis	\$79/\$114	2	CPX30569
2/16	Dealing with an IRS Exam: From Initial Contact to Closing	\$79/\$114	2	CPX30065
2/17	S-Corporation Essentials: Stock & Loan Basis Reporting	\$79/\$109	2	ACP09346
2/20	Self-Rental Real Estate: Passive Activity & Section 199A	\$79/\$114	2	CPX30592
2/21	Tax Season Update for Business with Steve Dilley	\$139/\$204	4	CPX30598
2/22	International Cross Border Transactions	\$79/\$114	2	CPX28124
2/24	False Tax Returns: Why CPAs and Their Clients Go to Prison	\$79/\$114	2	CPX30190
2/25	Partnership Essentials: Review and Update	\$129/\$129	4	ACP09467
2/27	Business Tax Update: Recent Developments	\$79/\$114	2	CPX30625



Welcome, New Members!

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

New Certified Members

Staci Purcell

Nathan | Kaufman Accountants & Advisors

James F. Kask

Stephen Boyd

Morris Group

Erica M. Ambrosio

Deloitte

Christina Nave

KPMG

Scott Esposito

EY

Theresa Santapaola

Gitlin & Company, LLC

Joshua Duhaime

Aimee Matteson

Garvey, Steele & Bancroft, LLP

Cassidy A. Whipple

Cassidy A. Whipple CPA, LLC

Steven Reisberg

CLA Consulting

Lisa Haylon

Southern Connecticut State University

Curtis Gorgone

Lenkowski, Lonergan & Co., LLP

Dylan Walker

CironeFriedberg, LLP

Glenn Hofsess

Endeavour Capital Advisors Inc.

Sarah Gomes (Hunt)

Deloitte

New Professional Colleagues

Kongmeng Thor

MMNT, LLC

Ben Werbiskis

MMNT, LLC

Xhoi Rokaj

LaQuerre Audi, LLC

Shawn Piercey

Wilkinson Wolfe & Associates

Ethan Girard

RSM US LLP

Joseph F. Sullivan

CliftonLarsonAllen (CLA)

Matthew Wlaz

Robert Kanabis

Kanabis Accounting Services LLC

Anna Vittucci

Hoyt, Filippetti & Malaghan, LLC

Nora Kaufman

Cohen, Kaufman & Associates LLC, CPAs

Teri Pough

CironeFriedberg, LLP

Sarah Shagloof

Rolleri & Sheppard CPAs, LLP

In Memoriam



Michael Sokolowski, a member since June 19, 1990, passed away on October 28, 2022 after a fierce but very short battle with glioblastoma. He was

Managing Partner of Guilmartin, DiPiro & Sokolowski, LLC in Middletown.

Edward Marc Axelrod, a member since October 18, 1973, passed away peacefully on October 31, 2022. He was the owner of Edward M. Axelrod, CPA, PC in Darien.



Member News

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



Dylan Walker

CironeFriedberg, LLP welcomed **Dylan Walker** as a Supervisor managing audit and assurance and client accounting service engagements for business and individual clients. He has experience developing cash flow models utilizing detailed analytics to assess risk for clients as well as directing client accounting and advisory services. He serves as President & Founder of the Scott T. Walker Foundation.



Brian Kelleher

Brian Kelleher, Partner at Fiondella, Milone & LaSaracina in Glastonbury, penned a guest column for *Accounting Today* entitled “Burned out on public accounting or burned out on your firm? They’re not the same thing.”



Paul Iannone

Paul N. Iannone and **Danny A. Pannese**, both Associate Professors in the Jack Welch College of Business & Technology at Sacred Heart University in Fairfield, wrote the *Tax Advisor* magazine cover story, “10 good reasons why LLCs should not elect to be S corporations.”



Danny Pannese

Members Appointed to Connecticut State Board of Accountancy

When there are vacancies on the State Board of Accountancy, the CTCPA is asked to nominate candidates to the governor for his consideration. We’re delighted to announce the appointments of members **Stacy Farber** and **Bernard “Bud” McDonald**.



Stacy Farber

Stacy, a Principal at UHY Advisors N.E., LLC, brings more than 22 years of experience in financial leadership to the board. She specializes in financial decision-making and company-wide policy development to overcome operational issues and drive proactive improvements. Stacy is the Farmington Attest and CAAS Practice Leader and Head of the UHY Employee Benefit Plan Center of Excellence for the Northeast Region.



Bud McDonald

Bud McDonald is a global business leader and financial expert with 40 years of cross-sector experience. As a senior partner and business leader at EY, Bud led the delivery of integrated, comprehensive solutions to solve the most complex financial, cybersecurity and technology issues facing companies today. While serving both audit and non-audit clients, his primary role was as the lead audit partner for large complex global companies. He also served EY’s Stamford Office Managing Partner.

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For more information or to request a complimentary analysis for your company or a client, contact Lisa Schwartz at 860-478-8846 or lschwartz@integritymerchantsolutions.com and let her know you’re a CTCPA member!

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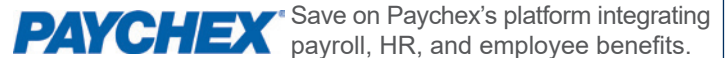
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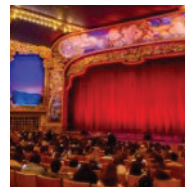
Movie Tickets

Save up to 40% at Connecticut theatre chains including AMC, Cinemark, Regal, and Showcase Cinemas.



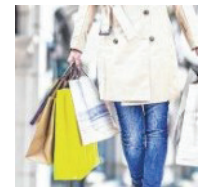
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Mergers/Acquisitions

As a leading, progressive firm in Fairfield and New Haven Counties, expanding regionally, we are interested in exploring a merger or affiliation with another strong firm to allow us to continue to grow, diversify our services, and expand our client base. For a confidential discussion, please contact Tony Cirone at CironeFriedberg, LLP by phone at 203-798-2721 or email tcirone@cironefriedberg.com.

Practices for Sale (Accounting Practice Sales) – Gross revenues shown: Danbury \$95K; Danbury area \$305K; Tolland County \$330K; Litchfield County \$525K; Washington County, RI \$360K; Kent County RI \$245K. For more info on these opportunities or to sell your practice, contact Lori Newcomer, CPA and Tim Price, CPA at 888-553-1040 or PNgroup@APS.net, or visit www.APS.net.

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To learn more, call Ken Gross from PACE at 1-800-453-4021 and mention that you are a CTCPA member.

Have questions or ideas? We're here to help!

We have developed strong partnerships with each of these carefully selected insurance providers. If you have questions or would like additional information, please reach out to Cindy Panioto at cindyp@ctcpas.org or 860-258-0213 and she will help you get in touch with the right people.

If you have any ideas for additional insurance savings we can offer to CTCPA members, please share those with Cindy as well.

CTCPA Members Donate Almost \$5,000 Plus Hundreds of Needed Supplies at Day of Giving Event



View more photos and news coverage from the Day of Giving at www.ctcpas.org/DayofGiving.

Thank you to all of you who came out for our second annual CTCPA Day of Giving! We collected so many toys for the kids at Connecticut Children's Medical Center and so much food for Connecticut Foodshare – and had a wonderful time reconnecting with many of you.

We collected \$3,565 for Connecticut Foodshare and \$1,294 for Connecticut Children's Medical Center, plus hundreds of toys and 1,220 pounds of food items. Plus ... you just might have seen some of your peers on both WFSB and Fox 61!

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