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First-ever CTCPA Interview Day brings together firms and accounting students for 130 job and internship interviews. *page 8*



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First-Ever CTCPA Interview Day

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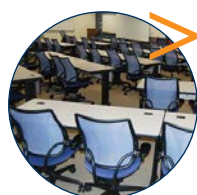
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Editor's Note

Interview Day and Beyond: Be a Part of The Next Big Idea

It's a great time to be an accounting major.

According to the 2013 *Trends in the Supply of Accounting Graduates and the Demand for Public Accounting Recruits* report released recently by the American Institute of CPAs (AICPA), "accounting graduates are enjoying an unprecedented level of demand from public accounting firms, with a record 40,350 accounting graduates hired in 2012 and 89 percent of those firms forecasting the same or increased hiring of graduates this year." [Read the full report at www.ctcpas.org/demand.]



Members of the CTCPA Advisory Council and Board of Directors saw an opportunity to respond to this trend last year during a strategic planning session. **Brian Kelleher** (now CTCPA president-elect) voiced his interest in developing a "one-stop-shop" event where firms looking to hire could connect with students from colleges large and small across the state. CTCPA Interview Day was conceived.

During subsequent Advisory Council meetings, members refined their vision for the structure of the day, participation requirements, and the student screening process. In the end, CTCPA hosted 130 interviews for internships and full-time positions in a single day at the CTCPA Education Center in September. We've already heard about numerous candidates who were offered internships and full-time employment as a result of the event! [See page 8 for the full story.]

From concept to execution, Interview Day demonstrates the mission of CTCPA volunteer leadership at its best – identify a need, help develop a plan to meet the need, and assist staff in the execution. The program was a grand slam.

What's the Next Big Idea? Help Us Figure it Out!

If you're interested in making your mark on the accounting profession, it's a great time to step up. The 2013-2014 Nominating Committee has just formed, and they are looking for members interested in submitting their names for consideration for next year's Advisory Council and Board of Directors. To toss your hat in the ring, simply email CTCPA Communications Coordinator Caitlin Bailey O'Neill at caitlinb@ctcpas.org, or respond to the email call for volunteers in early November.

See you next issue,

A handwritten signature in black ink that reads "Kirsten".

Kirsten Piechota, Managing Editor



Connecticut Taxes Encourage Wealthy to Flee

This piece originally appeared in the October 14, 2013 Hartford Business Journal.

By Arthur J. Renner, CPA, CTCPA Executive Director

It seems like every spring, after the end of tax season, CPAs talk about the number of their clients who have left Connecticut to establish residency elsewhere. This is not a recent phenomenon. It's a growing trend over the years.

On several occasions, CTCPA has surveyed its approximately 6,000 members on this topic at the request of the state Department of Revenue Services (DRS) and shared the results with the DRS. During the last couple of years, we've also surveyed our own membership on this very issue as it pertains to their own future plans. *[CTCPA Editor's Note: The results of this survey appear on page 6.]* Although the results of our membership surveys are not yet broad enough to be deemed statistically valid, they do show a trend developing.

From 2012 to 2013, the number of CPAs responding "yes" to the following question doubled: "Have you considered relocating to a state other than Connecticut?" Meanwhile, the number of respondents who said they have made an out-of-state real estate investment increased by 250 percent from 2012 to 2013.

That's significant.

What does all of this anecdotal information mean?

It is an indication that Connecticut taxpayers with financial wherewithal are choosing to relocate rather than suffer the economic consequences of remaining in Connecticut. Without a compelling reason to stay, like family ties, retirees and others with means are voting with their feet and ultimately their wallets.

Some may argue that there are also people choosing to relocate to Connecticut, particularly New York residents. It is true that Connecticut (and New Jersey) continue to attract individuals from New York who want to remain close to New York City, but want to escape the even higher tax burdens levied by the Empire State and its localities. I would counter by asking a key question: If people have relocated once to find a lower tax location, why would they necessarily be satisfied as they continue to evaluate their tax environment?

Connecticut is only relatively attractive tax-wise to New York.

On an absolute basis, Connecticut remains one of the highest-taxing states. And it's not just this tax or that tax; it's the aggregate – income tax, property tax, sales tax, succession tax, gasoline tax, etc. We pay the price, dearly, for every aspect of our Connecticut lifestyle, cradle to grave.

Our elected representatives regularly compare Connecticut taxes with those of neighboring states and conclude that our taxes aren't out of line. The problem is, lawmakers are looking at a region that is out of step with almost the entire country. Of the 10 states with the highest state and local tax burdens per capita, seven (including Connecticut) are within a three-hour ride by car from Hartford.

A number of studies by others, including the Tax Foundation, a Washington D.C.-based think tank, support the anecdotal information coming from Connecticut CPAs. People with wealth are moving from higher-taxing states, to states with lower tax burdens.

One year ago, *USA Today* reported Connecticut was the third-highest-taxing state in the nation. More recently, CNBC rated Connecticut the second worst "tax friendly state for retirees" in a report that concluded "seniors looking to stretch their hard-earned savings further might do well to cast a wider net (beyond Connecticut)."

As the so-called "silver wave" of retiring Connecticut Baby Boomers review their bank accounts, they will likely be reviewing their geography as well.

Are You Staying in Connecticut?

CTCPA Members Sound Off

By Caitlin Q. Bailey O'Neill, Assistant Editor

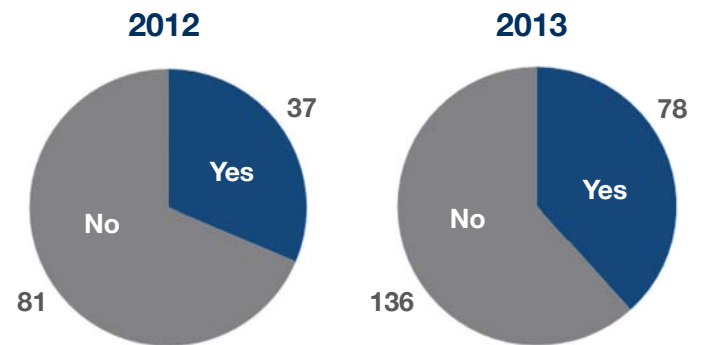
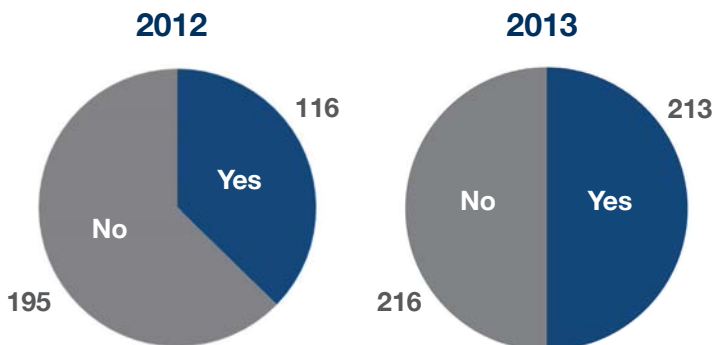


For several years now, CTCPA has been educating members, the public, and legislators on precisely how dire the state's fiscal situation is. While the numbers certainly are daunting, it's one simple question that presents the most frightening proposition: what happens when people give up and leave Connecticut?

In July 2012 and July 2013, CTCPA asked its Connecticut-based members if an exodus was in their plans. Have you considered leaving? Do you already have an out-of-state real estate investment? A trend is emerging in this annual survey – and it doesn't spell good news for the state's fiscal future.

Have you strongly considered relocating to a state other than Connecticut?

Have you made an out-of-state real estate investment?

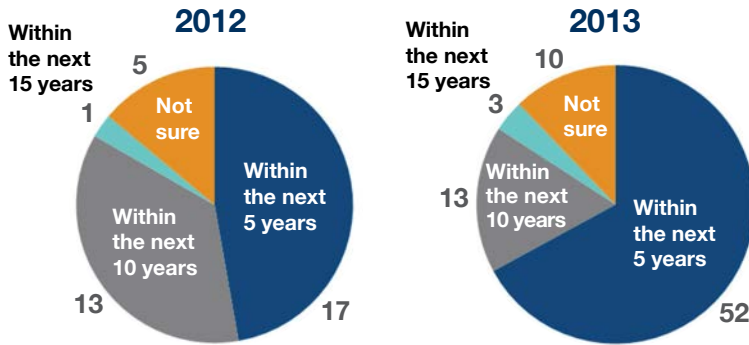


In 2013, survey responses indicated that said real estate investments were concentrated in the following regions:

- Florida (34 out of 68 responses)
- Another state in New England (16 out of 68 responses)
- Mid-Atlantic state (10 out of 68 responses)



When do you intend to leave Connecticut?



What motivated you to make a real estate investment outside of Connecticut?

Respondents ranked eight possible reasons in order of importance. In 2013, the top four reasons were “state income tax considerations,” “climate considerations,” “property tax considerations,” and “Connecticut’s economy.” These top four reasons were unchanged from the 2012 survey.

The other reasons listed included “family considerations,” “state succession/estate tax considerations,” “career/employment opportunity,” and “vacation/second home purchase opportunity.”

Why have you elected to remain in Connecticut?

As questions 1 and 2 clearly show, not everyone is planning to leave Connecticut. Respondents were asked to rank five possible reasons to stay in order of importance; the overwhelming top two responses both years were “my family is here” and “my practice is here.”

The other possible reasons were “I love Connecticut,” “it’s too much of a hassle to move,” and “I have no financial concerns about remaining.”

Respondents were also asked what factors, if any, would change their decision to remain in Connecticut. The top two reasons both years were “a change in my family’s situation” and “retirement.”

Thank you to our survey respondents!

This survey will be sent to all Connecticut-based CTCPA members every July. This year, **Jessica Cipriano** was the lucky recipient of a \$100 Amazon.com gift card raffled off to all survey respondents.

Thank you to all members who took the time to share their thoughts!



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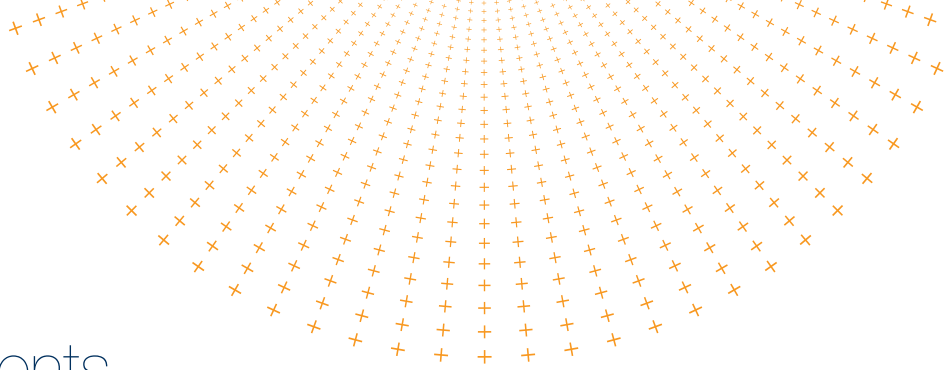


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- 1 Day
- 13 Hiring Firms
- 63 Accounting Students
- 130 Job and Internship Interviews

CTCPA INTERVIEW DAY 2013

By Caitlin Q. Bailey O'Neill, Assistant Editor

One year ago, the 2012-2013 CTCPA Advisory Council had a big, broad agenda item: How would you build your ideal CPA association?

Naturally, the talk turned to recruiting and filling the pipeline.

Brian Kelleher, a partner at Fiondella, Milone & LaSaracina in Glastonbury and now CTCPA president-elect, mentioned his firm's involvement in a college career fair and the subsequent recruiting process. Wouldn't it be neat, he wondered, if the CTCPA could bring students from all over the state together on one designated day, so that firms could complete a number of interviews in one day with a broad range of candidates?

Throughout the year, the Advisory Council and a CTCPA staff taskforce massaged that idea, planned the program, and visited professors to get their input – and on September 26, the first-ever CTCPA Interview Day was held.

"Interview Day responded to an opportunity identified by the Advisory Council that would serve a number of CTCPA constituents: firms, schools, and students," said CTCPA Executive Director **Art Renner**. "We felt this was a worthwhile project in which to invest financial resources and significant staff effort."

"This event was a win-win for everyone involved," agreed CTCPA CPE Director **Lisa Bugryn**, who, along with CTCPA Academic and Career Awareness Specialist **Alicia Strong**, led the staff taskforce. "We provided an opportunity for firms who may not have visibility at all schools, students who may not be exposed to this variety of firms, and colleges and universities that provide placement assistance to their students. In my 23 years with the CTCPA, this has been the most fulfilling event I have been a part of."

In all, 63 professor-selected, "best-of-the-best" students from 10 Connecticut colleges and universities submitted resumes and essays to be considered



for interviews for both full-time employment and internship positions.

The 13 participating firms (see sidebar on page 10) reviewed the submissions and selected 50 of those candidates for up to 10 interviews that day. Once the students confirmed their interest in the requesting firms, the scheduling puzzle began!



“We’ve been missing out on some really great candidates because we just didn’t have the manpower to go out to all of these schools.”

Brian Kelleher, Partner, Fiondella, Milone & LaSaracina

While the excitement was palpable from the beginning, as Strong pointed out, “the momentum built when we found ourselves scheduling 130 interviews for 50 students!

“It was long nights and early mornings, more brainstorming sessions than I can count, and an amazing amount of teamwork that made this event the most successful it could possibly be,” Strong continued.

A (Temporary) New Look for the CTCPA Education Center

On September 26, the CTCPA Education Center was transformed. Event design company Creative Dimensions of Cheshire brought in a team to assemble 10-foot-tall cubicles in two of the classrooms, where candidates met with one or two firm representatives. White noise machines were distributed throughout the rooms to ensure privacy during the 40-minute interviews.

In the lobby, students mingled with firm greeters, professors, and each other in a casual lounge, complete with couches and high-top tables and stools. The third classroom accommodated breakfast and a networking lunch.

CTCPA Past President **Marcia Marien**, a partner with O’Connor Davies in Wethersfield, came with firm staffer **Joseph Onion** as well as **Brett Settles**, a recruiter out of the firm’s New York office who happened to be unfamiliar with the CTCPA.

“I told him with confidence that I was not worried about it ... the Connecticut Society always does things first class,” Marien said.

“It was just over the top,” she proclaimed. “From the physical transformation of the rooms to the organization of the activities to the quality of the candidates that we were presented with ... We wanted to hire all of them! I was especially impressed that the professors were invited and that they attended, some from more than an hour away. What a commitment to their students.”

Kelleher agreed with Marien and the other employers present at Interview Day, admitting that the day turned out even better than he’d anticipated at that initial 2012 Advisory Council meeting.

“We’ve been missing out on some really great candidates because we just didn’t have the manpower to go out to all of these schools – that’s why this was so wonderful,” he said. “It was nice to have everybody come to us in one day, and for someone else to do all the coordinating!”

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continued ►

Students were equally grateful for the opportunity to participate. "This was an exceptional experience," said Post University student **Sarah Stover**. "I cannot think of a better or more efficient way to connect students with firms, and the opportunity to network was excellent."

What Next?

Following the 40-minute interviews held on Interview Day, most firms embarked upon second interviews. One firm planned to bring "at least five" of its 10 candidates in for second interviews, and numerous candidates have already been offered internships and full-time positions!

For Shelton firm Dworken, Hillman, LaMorte & Sterczala, Interview Day made such an impact that the firm has decided to revamp its recruiting process to make the most of the program, moving the start of its recruiting process up from October to September to best take advantage of the high-quality candidates participating in Interview Day.

"The day was well worth it," said Dworken, Hillman, LaMorte & Sterczala Principal **Michael Ganino**, who interviewed alongside Firm Manager **Heather Smith-Jaser**. "[It was] just a great investment – the set-up was great, the candidates were great."



"This decreased the number of hours and the financial investment involved in our recruiting," said Ganino, adding that he loved that the candidates were, essentially, "pre-screened" by the college professors.

"We'd love it if it were a two-day thing – it was *that* good!"

Thank you to our inaugural firm participants!

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Survey Results: Are New Accounting Hires Equipped to Meet Employers' Expectations?

By Pamela Q. Weaver, DBA, CPA and Marie G. Kulesza, MSPA, CPA, CMA

Every year new accounting graduates enter the profession with the technical skills needed for entry-level positions and to pass the CPA Exam. Is this enough? As a large numbers of baby boomer CPAs approach retirement age, are these young professionals poised to take over significant roles in the profession?

New accounting hires and their employers agree that there is a need for a wider range of core skills to be a successful accountant in the workplace. A survey conducted this spring helped identify the specific ancillary core skills expected by employers – and those skills that young professionals wished they had more exposure to while in college.

Cross-Section of Respondents

The survey drew 194 responses from two groups of CTCPA members: (1) managers – individuals who hold supervisory positions and (2) young professionals – individuals who are under age 35 and not students. In general, the survey elicited meaningful responses from a cross-section of industry sectors. Individuals currently practicing public accounting were the highest represented group (68 percent), with the remaining in a variety of settings such as manufacturing and financial services.

As expected, the current position and current primary job role held by young professionals in their respective industries fell into the entry level or associate category. The young professionals' responses showed

internal/external auditor roles as their primary job, followed by financial accountant. Their counterparts, managers, indicated positions held at director, partner, owner, or upper management level. Tax specialists topped the survey responses for managers, followed by other roles comprised mainly of CFOs, CEOs, and controllers.

Results

The survey asked both managers and young professionals questions regarding the importance of defined technical and soft skills. Managers were asked the question “What are the top 10 teachable skills in addition to the traditional vocational education that you value in recent accounting graduates?” The young professionals group was asked to indicate which 10 skills they wished they had more exposure to while in college. All respondents ranked their selections in order of importance.

Both groups included *critical/strategic thinking, time management and organization, memos and writing skills, and intermediate to advanced Excel skills* in their top five skills. The managers chose *problem solving* as the remaining top five skill and the young professionals selected *basic workpaper formatting and organization* to round out their top five.

Figure 1 shows the top 10 skills as ranked by both groups. Although in a different order, the groups agreed on eight of the top 10. Of the remaining, the managers valued *business etiquette* and *working in teams*, whereas the young professionals picked *networking strategies* and *selling skills/rainmaking*. The color coding highlights the relative importance of each skill for the two groups.

To address the concern that managers from different industries may value different skills, the data was reviewed for three categories: local (i.e.

FIGURE 1. Top 10 Ranked Skills

| Managers | Young Professionals |
|------------------------------------|------------------------------------|
| Problem solving | Intermediate/advanced Excel skills |
| Critical/strategic thinking | Basic workpaper skills |
| Time management and organization | Critical/strategic thinking |
| Memos and writing skills | Time management and organization |
| Intermediate/advanced Excel skills | Memos and writing skills |
| Business etiquette | Tax research |
| Working in teams | Problem solving |
| Basic workpaper skills | Networking |
| Leadership | Leadership |
| Tax research | Selling skills/rainmaking |

small) CPA firms, larger CPA firms (encompassing national/regional firms), and other industry, which included manufacturing, not-for-profit, insurance, and other categories. Table 1 shows the weighted ranks for each skill by industry for the managers' group.

The local CPA firms showed less emphasis on *intermediate to advanced Excel skills* and *working in teams* than the other segments. The national/regional firms indicated more focus on *professional communication software (i.e. Outlook)*, and the other industry category has less need to have the *ability to do basic tax research* and *basic workpaper formatting and organization*, yet placed more value on *goal setting* than the total group.

The consideration of industry is important because accounting education is often somewhat generic, and the study provides evidence that not only do the needs differ with the size of accounting firm, but accountants who work in other sectors have industry-specific needs.

A similar analysis was done for the young professionals group and the differences among industries were somewhat more pronounced (see Table 2). The group from the local firms valued *memos and writing skills* less and the *ability to do basic tax research* more than the total group. The group from the national/regional firms valued *basic Excel skills*, *business etiquette*, *oral presentations*, and *conflict resolution* higher than the total group, but the *ability to do basic tax research* much lower than both the local firms group and the total group.

These differences likely reflect the more specialized role for young professionals in the larger firms and the fact that the majority of the respondents from the young professionals in the national/regional firms held audit positions. The other industry group indicated a greater need for *problem solving*, *database setup and database management*, and *goal setting*, and less need for *basic workpaper formatting and organization* than the total group. However, it is important to consider that the other industry group of young professionals represented only nine individuals.

continued ►

| Skill | Weighted Rank | | | |
|---|---------------|------------|-------------|----------------|
| | Total Group | Local Firm | Larger Firm | Other Industry |
| Problem solving | 1 | 1 | 4 | 1 |
| Critical/strategic thinking | 2 | 2 | 2 | 2 |
| Time management and organization | 3 | 3 | 3 | 4 |
| Memos and writing skills | 4 | 4 | 1 | 5 |
| Intermediate to advanced Excel skills | 5 | 9 | 6 | 3 |
| Business etiquette | 6 | 5 | 5 | 7 |
| Working in teams | 7 | 19 | 7 | 6 |
| Basic workpaper formatting and organization | 8 | 7 | 8 | 11 |
| Leadership | 9 | 8 | 11 | 9 |
| Ability to do basic tax research | 10 | 6 | 13 | 15 |
| Goal setting | 11 | 10 | 14 | 8 |
| Oral presentations | 12 | 11 | 10 | 12 |
| Basic Excel skills | 13 | 12 | 12 | 10 |
| Professional comm. software (i.e. Outlook) | 14 | 14 | 9 | 13 |
| Conflict resolution | 15 | 15 | 15 | 14 |
| Selling skills/rainmaking | 16 | 13 | 17 | 19 |
| Networking strategies | 17 | 17 | 16 | 18 |
| Cultural awareness | 18 | 16 | 19 | 17 |
| Database setup and database management | 19 | 19 | 18 | 16 |
| Video conference skills | 20 | 20 | 20 | 20 |

| Skill | Weighted Rank | | | |
|---|---------------|------------|-------------|----------------|
| | Total Group | Local Firm | Larger Firm | Other Industry |
| Intermediate to advanced Excel skills | 1 | 2 | 1 | 2 |
| Basic workpaper formatting and organization | 2 | 1 | 4 | 9 |
| Critical/strategic thinking | 3 | 4 | 5 | 1 |
| Time management and organization | 4 | 5 | 3 | 5 |
| Memos and writing skills | 5 | 9 | 2 | 7 |
| Ability to do basic tax research | 6 | 3 | 14 | 8 |
| Problem solving | 7 | 7 | 11 | 3 |
| Networking strategies | 8 | 6 | 12 | 11 |
| Leadership | 9 | 10 | 10 | 10 |
| Selling skills/rainmaking | 10 | 8 | 18 | 13 |
| Database setup and database management | 11 | 13 | 16 | 4 |
| Business etiquette | 12 | 12 | 7 | 20 |
| Professional comm. software (i.e. Outlook) | 13 | 14 | 13 | 19 |
| Conflict resolution | 14 | 15 | 9 | 12 |
| Goal setting | 15 | 11 | 17 | 6 |
| Basic Excel skills | 16 | 18 | 6 | 18 |
| Oral presentations | 17 | 16 | 8 | 15 |
| Working in teams | 18 | 17 | 15 | 16 |
| Video conference skills | 19 | 19 | 20 | 14 |
| Cultural awareness | 20 | 20 | 19 | 17 |

The final question was whether there was agreement between the managers and young professionals in the same industry. In other words, do the recent graduates and their supervisors agree on the skills needed? For the local firms, one half of the skills had the five-point or more differential in the rankings. The most marked differential for the local firms group was *networking strategies*, with the young professionals group putting greater emphasis on the skill. The regional/national firms' results indicated better alignment between the two groups, but still some marked differences in areas such as *problem solving* and *working in teams*.

The other industry group was notable both for the large number of differences and also the magnitude of the differences. *Business etiquette*, *working in teams*, and *database setup/database management* all had ranking differentials of 10 points or more. Again, the small number of respondents for the industry young professionals group may have impacted the results.

Why Is This Important?

It is clear that employers want employees who possess a set of technical skills, but at the same time, they want employees who have the skill set to think critically and solve problems. More and more, employers want new hires that are *well-rounded* and proficient in a wide range of thinking and communication skills. In addition, as the baby boomer CPAs get ready to retire, managers become concerned about whether the young professionals have the skills to be successful at the next level.

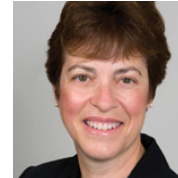
In looking at the ranking of skills by industry, managers and young

professionals frequently disagreed on the relative importance of the skills. This shows the need for more open discussion on the importance of non-technical skills and a dialogue on exactly what each skill entails in the specific workplace.

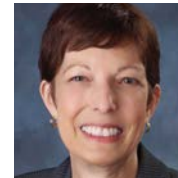
The survey highlights the need to increase the breadth of the accounting curriculum to include the valued ancillary core skills covered by the survey. CPA society CPE offerings or firm in-house education can continue to reinforce these skills during the early years of the career of new accounting hires. The differences in industry highlight the fact that different jobs may require different skills. Some of the lower ranked skills could be taught within the individual companies or industries.

In addition, the young professionals need to be proactive about pursuing training in these skills and managers may need to do a better job communicating the importance of these skills to the younger employees.

At minimum, the research may spark discussion about the need to teach or learn skills in addition to the traditional vocational education, and promote new methods for teaching the ancillary skills.



Marie G. Kulesza, MSPA, CPA, CMA is an assistant professor of business administration at the University of Saint Joseph and has more than 15 years of experience in public accounting. She can be reached at mkulesza@usj.edu.



Pamela Q. Weaver, DBA, CPA specializes in tax and business consulting services. She is also on the faculty of the University of Hartford's Barney School of Business. She holds a Doctor of Business Administration focusing on optimizing business performance and leadership. She can be reached at pweaver@pqweavercpa.com.



Want to Learn More?

View the complete survey report at

www.ctcpas.org/Top10Skills


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>> Members-Only Meetings

Reserve your place at www.ctcpas.org/membermeetings.

Questions?

Contact Membership Activities Coordinator Phyllis Roche
phyllisr@ctcpas.org • 860-258-0216.



The Friday Focus for Members in Industry

CTCPA Education Center, Rocky Hill
8:30 - 10:30 a.m. • CPE Credits: 2



Technology Breakfast Roundtables

CPE credit not available.

Preparing Your Business for the Unexpected Friday, November 15, 2013

Speaker: **David H. Pilon**, CPA, CFA,
Director of Business Development, Bouvier Insurance

Individual Income Tax Update

New date! Friday, December 20, 2013

Speaker: **John L. Evanich Jr.**, CPA

Get some expert advice from members of the Technology Committee in a fun, relaxed atmosphere. No registration necessary. Members purchase their own breakfasts.

Thursday, November 21, 2013

New location! Cristy's Luncheonette
1261 Boston Post Rd., Westbrook, CT • 8:00 a.m.

Thursday, December 19, 2013

Riverdale Diner, Shelton • 8:00 a.m.

Thursday, January 16, 2014

New York Pickle Deli, Rocky Hill • 8:00 a.m.



Torrington CONNecTion

Northwest Connecticut Chamber of Commerce, Torrington
8:30 - 10:30 a.m. • CPE Credits: 2



Rocky Hill CONNecTion

CTCPA Education Center, Rocky Hill
8:30 - 10:30 a.m. • CPE Credits: 2

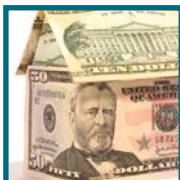
When Need-Based Financial Aid for College Isn't Enough Wednesday, November 20, 2013

Speaker: **John F. Pearson**, CPA, CASL, CIC,
Barnum Financial Group, an Office of MetLife

Connecticut Estate Tax Update

Friday, November 22, 2013

Speaker: **John J. Palmeri**, CPA, LL.M.,
Owner, John J. Palmeri, Attorney at Law



Personal Financial Planning Group of Fairfield

Easton Public Library, Easton
8:30 - 10:30 a.m. • CPE Credits: 2



Easton CONNecTion

Easton Public Library, Easton
8:30 - 10:30 a.m. • CPE Credits: 2

When Need-Based Financial Aid for College Isn't Enough Thursday, November 21, 2013

Speaker: **John F. Pearson**, CPA, CASL, CIC,
Barnum Financial Group, an Office of MetLife

Don't Leave Probate to Chance: The Importance of Understanding Probate in Your Client's Overall Financial Plan

Thursday, December 19, 2013

Speaker: **Julie Jason**, J.D., Chief Investment Officer,
Jackson, Grant Investment Advisers

**Attend a
committee
meeting.**

**Join the
conversation.**

CTCPA technical committees offer fantastic opportunities to discuss timely topics with peers who share your areas of interest and expertise, all while building your network and often earning free CPE.

Federal Income Taxation Committee

Thursday, November 14, 2013 • 8:30 a.m.
CTCPA Education Center, Rocky Hill

L3C for Nonprofits

Speaker: **John Horak, Esq.**, Reid and Riege

Federal Income Taxation and Trust, Estate, and Gift Taxation Committees

Wednesday, January 22, 2014 • 8:30 a.m.
CTCPA Education Center, Rocky Hill

K-1 Hedge Funds

Speaker: **Edward E. Granelli Jr., CPA**,
Tax Partner, O'Connor Davies

Not-for-Profit Organizations Committee

Thursday, January 23, 2014 • 8:30 a.m.
CTCPA Education Center, Rocky Hill

Current Topics for Exempt Organizations

Speakers: **Raymond Casella, Esq.**, Partner and **Ryan
Leichsenring, Esq.**, Associate, Shipman & Goodwin LLP

Special Fraud Program!

Business Fraud Update and Detective Mystery

**Monday, November 18, 2013
8:30 a.m. - noon**

Toby Bishop, director of the Deloitte Forensic Center for Deloitte Financial Advisory Services in Chicago, a Deloitte Eminence Fellow, and former president and CEO of the Association of Certified Fraud Examiners, will start out with an update of the fraud schemes that might be a threat to you or your clients.

Then, polish your interviewing and fraud detection skills with an interactive embezzlement mystery where you'll play the role of a CPA investigating how controls were overridden or circumvented and what controls may have been missing.

Register at www.ctcpas.org/register, keyword "BFU."



Relax. Unwind. Enjoy.

It's Just **LIFE**

Empowered to Connect

Thursday, November 14, 2013

6:00 - 8:00 p.m.

CPE Credit: 1

Getting ahead in your career as a professional woman requires you to develop a robust network of mutually beneficial relationships that you have created and maintained over time, so that they are in place when you need them. That's networking.



In this session, motivational speaker and author **Kathy McAfee** will show you how you can more easily and naturally connect and build relationships with influential people, and have fun doing it.

Pricing

CTCPA members: \$35; nonmembers: \$40

Hartford Club Holiday Wine Tasting Event

Tuesday, December 10, 2013

6:30 - 8:00 p.m.



Join us at the Hartford Club's annual holiday wine tasting, held in the club's elegant 1904 Georgian Revival clubhouse. We'll enjoy wine, delicious appetizers, and holiday fun.

Pricing

CTCPA members and nonmembers: \$35
Bring a friend!

**Learn more and register at
www.ctcpas.org/LIFE.**

December-January 2013 CPE Calendar

| Date | Title | Express Code | Location | CPE Credit | Member Rate Standard/Early | Early Bird Good Through |
|---------------------|--|--------------|-------------|------------|----------------------------|-------------------------|
| December | | | | | | |
| 2 | Surgent McCoy's Comprehensive Guide to Tax Depreciation, Amortization, and Property Transactions from Acquisition to Exchange or Disposition | TDAP | Rocky Hill | 8 | \$285/\$250 | 11/17/2013 |
| 2 | Using Your iPad as a Business Tool | CXUIBT | Rocky Hill | 8 | \$285/\$250 | 11/17/2013 |
| 3 | Surgent McCoy's Advanced Critical Tax Issues for Limited Liability Companies and Partnerships | ACTL | Rocky Hill | 8 | \$285/\$250 | 11/18/2013 |
| 3 | Excel Bootcamp: Tips, Tricks, and Techniques | CXEB | Rocky Hill | 8 | \$285/\$250 | 11/18/2013 |
| 3 | Loscalzo's Compilation and Review Essentials: Rules for Local Practitioners | CRE-B | Norwalk | 8 | \$310/\$275 | 11/18/2013 |
| 4 | Income Taxation of Trusts and Estates: Planning and Preparation of Form 1041 | ITTE | Rocky Hill | 8 | \$285/\$250 | 11/19/2013 |
| 4 | Loscalzo's Analyzing Financial Statements, Including Techniques for Cash Flow Analysis | AFS | Rocky Hill | 8 | \$285/\$250 | 11/19/2013 |
| 5 | Partnership and LLC Taxation: Advanced Issues, Including Transfers of Interests and Liquidations | PTAI | Rocky Hill | 8 | \$285/\$250 | 11/20/2013 |
| 5 | Revenue Recognition: A New Day is Dawning | RERE | Rocky Hill | 8 | \$285/\$250 | 11/20/2013 |
| 6 | Social Security Benefits: Advising Clients | SSB | Rocky Hill | 8 | \$285/\$250 | 11/21/2013 |
| 9 | Surgent McCoy's Federal Tax Camp | SATC | Plantsville | 8 | \$285/\$250 | 11/24/2013 |
| 10 | Ethical Considerations in Your Tax Practice <i>(Morning Session)</i> | EXTP4 | Rocky Hill | 4 | \$170/\$150 | 11/25/2013 |
| 10 | Individual Tax Planning Ideas for 2013 <i>(Afternoon Session)</i> | ITP4 | Rocky Hill | 4 | \$170/\$150 | 11/25/2013 |
| 10 | Loscalzo's Not-for-Profit Auditing Made Easy | NFPME | Rocky Hill | 8 | \$285/\$250 | 11/25/2013 |
| 11 | Advanced Technical Tax Forms Preparation: LLCs, S Corporations, and Partnerships | ATFB | Rocky Hill | 8 | \$285/\$250 | 11/26/2013 |
| 11 | Loscalzo's Frequently Missed Issues for OMB Circular A-133 Audits | FMI | Rocky Hill | 8 | \$285/\$250 | 11/26/2013 |
| 12 | Loscalzo's Governmental Update and Major Accounting and Disclosure Issues | GASB | Rocky Hill | 8 | \$285/\$250 | 11/27/2013 |
| 12 | Advanced Technical Tax Forms Preparation: Form 1040 Issues | ATFI | Rocky Hill | 8 | \$285/\$250 | 11/27/2013 |
| 16 | Loscalzo's 2013 FASB and AICPA Update | ARU-D | Norwalk | 8 | \$310/\$275 | 12/1/2013 |
| 16 | From Hiring to Firing and Everything in Between: Legal, Tax, and Healthcare Issues | HTOF | Rocky Hill | 8 | \$285/\$250 | 12/1/2013 |
| 17 | Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement | DRMM | Rocky Hill | 8 | \$285/\$250 | 12/2/2013 |
| 17 | Loscalzo's Accounts Payable Fraud: Overlooked Schemes and How to Detect and Prevent Them | FRAUDAP | Rocky Hill | 8 | \$285/\$250 | 12/2/2013 |
| 18 | Loscalzo's Professional Ethics for CPAs <i>(Morning Session)</i> | ETH1218 | Norwalk | 4 | \$185/\$165 | 12/3/2013 |
| 19 | Getting Ready for Busy Season: A Guide to New Forms, Filing Issues, and Other Critical Developments | NFFI | Rocky Hill | 8 | \$285/\$250 | 12/4/2013 |
| 20 | Effective and Efficient Senior-Level Review of Individual Tax Returns | ERTW | Rocky Hill | 8 | \$285/\$250 | 12/5/2013 |
| January 2014 | | | | | | |
| 6 | Advanced Individual Income Tax Workshop | AIITW-A | Trumbull | 8 | \$310/\$275 | 12/22/2013 |
| 7 | Advanced Individual Income Tax Workshop | AIITW-B | Plantsville | 8 | \$285/\$250 | 12/23/2013 |
| 9 | Advanced Corporate/Business Income Tax Workshop | ACITW | Plantsville | 8 | \$285/\$250 | 12/24/2013 |
| 13 | Preparing Individual Tax Returns for New Staff and Paraprofessionals | PITR | Rocky Hill | 8 | \$285/\$250 | 12/29/2013 |
| 13-15 | Professional Staff Growth Level 1 | PSG1 | Rocky Hill | 24 | \$585/\$550 | 12/29/2013 |
| 14 | The Complete Guide to Preparing Limited Liability Company, Partnership, and S Corporation Federal Income Tax Returns | PLPS | Rocky Hill | 8 | \$285/\$250 | 12/30/2013 |
| 16 | The Complete Guide to the Preparation of Form 1041 | 1041-B | Rocky Hill | 8 | \$285/\$250 | 1/2/2014 |
| 17 | The Complete Guide to the Preparation of Form 1041 | 1041-C | Norwalk | 8 | \$310/\$275 | 1/2/2014 |
| 29 | Identifying Fraudulent Financial Transactions | FE-FFT | Rocky Hill | 8 | \$285/\$250 | 1/14/2014 |
| 30 | Risk Assessment and Internal Control:s Best Practices for Small Business Audits | SBABR | Rocky Hill | 8 | \$285/\$250 | 1/15/2014 |

Ready to register?

Go to www.ctcpas.org/register, enter the express code to find your course, and register!



New and Young Professionals Upcoming Events



Annual Holiday Drive: Books for Read to Grow

November 11 - December 20, 2013

Collect donations at your school or company in support of our annual holiday charity drive. This year we're collecting new and gently used books for Read to Grow, an organization that promotes early literacy for Connecticut children.

Request participation posters from Alicia Strong at alicias@ctcpas.org, or download and print your own at www.ctcpas.org/nyp.



Happy Hour with the Young Lawyers Section of the Connecticut Bar Association

Thursday, November 21, 2013

5:30 - 8:00 p.m.

Tavern Downtown, Hartford

Join us as we network with members of the Connecticut Bar Association Young Lawyers Section in a fun and relaxed environment. Light appetizers will be provided; cash bar.

Attendance is free, but please register in advance at www.ctcpas.org/nyp.



St. Jude Give thanks. Walk.

Saturday, November 23, 2013

8:30 a.m.

Join Team CTCPA at
Evergreen Walk, South Windsor

All participants in this St. Jude Children's Research Hospital walk are encouraged to raise money to help kids battling cancer and other deadly diseases.

Join the Team CTCPA at
www.ctcpas.org/NYP.

6th Annual

Mingling & Merriment

The CTCPA New and Young Professionals Holiday Party

* Thursday, December 12, 2013

* 6:30 to 10:00 p.m.

* The Society Room of Hartford

* Tickets: \$30 members, \$35 nonmembers

Network with professionals while enjoying beer, wine, and ample hors d'oeuvres.

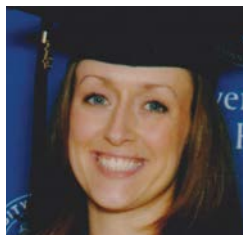
Purchase tickets online at www.ctcpas.org/holiday.





ETF Scholarship Winners: Where Are They Now?

Lori A. Litwinovich



Colleges and Majors

Accounting – Housatonic Community College (May 2011)

Accounting – University of New Haven (May 2013)

Educational Trust Fund Scholarships

Outstanding Community College Accounting Student Award (2011)

Merit Award (2013)

Where are you right now in your education/career?

I am fortunate to have two fantastic part-time jobs as I continue my hunt for a CPA-related job. I work in production at WSHU Public Radio on the campus of Sacred Heart University in Fairfield. I work with two other women producing nationally syndicated Sunday Baroque, as well as Lauren Rico and Kate Remington's classical programs. I also do the accounting for Charter Oak Automation in New Haven. It is a small machine shop which manufactures manual and CNC mills, and is only nine months in existence. My goal of achieving my CPA certification continues as I study for the CPA Exam and continue my career hunt for a position under a CPA.

How did your CTCPA ETF scholarships affect your academic career?

The scholarship provided by the CTCPA advanced my academic career incredibly. Not only did they lighten my finan-

cial burden, which allowed me to focus more time on my education, but they provided me with invaluable encouragement, resources, and confidence that I wouldn't have had otherwise.

What is something people would be surprised to know about you?

Schooling didn't come naturally to me. I struggled through high school, and this was my second attempt at college. It took a tremendous effort to learn self-discipline and consciously practice time management and organization. This discipline has improved so many other aspects of my life, and continues to keep me driven and focused.

What unique work or life experiences did you bring to your studies?

Prior to returning to school, I worked in retail and retail management, where most of my income was performance-based. While my motivation was initially financial, I developed a strong desire to succeed. The feeling of success based

on my own perseverance spilled into every aspect of my life: educational, professional, and personal.

What was your best college experience?

To fulfill UNH's experiential learning credit, along with a missing science lab, I spent five weeks in Costa Rica studying marine biology. I found strength and independence that I didn't know was in me. In our free time, some classmates and I volunteered at an orphanage in the impoverished capital city of San Jose. The conditions that the children were living in were horrid. We painted murals, sanitized top to bottom, and gave these forgotten children some much-needed attention.

What advice do you have for other accounting majors/aspiring CPAs?

Stay organized! A well-kept day planner with penned-in study and homework time is your best tool. That – and take advantage of your school's tutors!



Litwinovich (top right) poses with fellow volunteers at an orphanage in Costa Rica.



Litwinovich celebrates with her family at graduation.



Welcome, New Students!



Jeffrey L. Belrose of Saint Albans, VT
University of Hartford

Julia Bowers of Milford
Western Connecticut State University

Doug S. Brayton of Glastonbury
Central Connecticut State University

Jason J. Cabildo of North Haven
Quinnipiac University

Hannah L. Caplan of Wallingford
Roger Williams University

Dina M. Centonze of Norwalk
College of Westchester

Elisha A. Cruz of Hamden
Southern Connecticut State University

Abisola S. Daniel of New Haven
Southern Connecticut State University

Anthony Esposito of Monroe
University of Connecticut

Julia R. Galica of Suffield
University of Connecticut

Christopher D. Gaspar of Fairfield
Fairfield University

Daniel Gonzalez-Rodriguez of Killingworth
Southern Connecticut State University

Ryan J. Joseph of East Granby
Westfield State University

Lori Kirch of Stafford Springs
Kaplan University

Keith A. Lewis of New Haven
University of Bridgeport

Jingyi Liu of Storrs
University of Connecticut

Wenyue Liu of Storrs
University of Connecticut

Elise McCormick of Storrs
University of Connecticut

Clay J. Merrill of Cheshire
Bryant University

Chelagat N. Misiko of Meriden
SUNY Institute of Technology

Joseph Mitton of Enfield
University of Connecticut

Wellington J. Nunez of Danbury
Western Connecticut State University

Christina M. Parla of Manchester
University of Connecticut

Daniel Ritzer of Andover, MA
University of Connecticut

Rebecca M. Samuels of New Britain
Central Connecticut State University

Faith Santos of Storrs
University of Connecticut

Ori J. Statlender of Bethany
University of Connecticut

Aishwarya Upadhyaya of Southington
Central Connecticut State University

Michaela Y. Wheeler of Goshen
University of Connecticut

CPE and Ski Conference

January 13, 14, and 15, 2014

Beaver Run Resort and Conference Center

Breckenridge, Colorado

www.beaverrun.com

Sessions include:

| | | | |
|---------------------------------|---------|-------------------------|-------|
| Managing Documents in the Cloud | 1/13/14 | 7:30 a.m. to 11:00 a.m. | \$100 |
| Top 15 All-Time Hints and Tips | 1/13/14 | 4:10 p.m. to 7:40 p.m. | \$100 |
| Federal Tax Update | 1/14/14 | 7:30 a.m. to 11:00 a.m. | \$100 |
| Accounting and Auditing Update | 1/14/14 | 4:10 p.m. to 7:40 p.m. | \$100 |
| Tech Update | 1/15/14 | 7:30 a.m. to 11:00 a.m. | \$100 |
| Office 2013 and Windows 8 | 1/15/14 | 4:10 p.m. to 7:40 p.m. | \$100 |

Contact K2 Enterprises for an information packet at 888-542-9390 or www.k2e.com/ski.





*“It’s a beautiful day in the neighborhood”
... and on the golf course!*


2013 ETF Golf Tournament

It was another beautiful day for the **Educational Trust Fund Golf Tournament** (sponsored by Robert Half), held on Monday, September 23 at The Farms Country Club in Wallingford. Participants enjoyed a beautiful autumn day on the links in addition to a delicious buffet luncheon, on-course refreshments, cocktails and hors d’oeuvres, dinner stations, dessert and flavored coffees, and raffle prizes and awards. The player gift was a golf umbrella sponsored by Farmington Bank.

All proceeds from the tournament are used to fund CTCPA Educational Trust Fund scholarships.

The tournament was coordinated by the 2013 Golf Tournament Committee: **Michael Notarangelo** (Chair), **Thomas Goldfuss III** (Chair-elect), **Bonnie Olivieri** (Staff Liaison), **Curtis Audibert**, **Gregory Lainas**, **Beth Berry**, **Steven LeFebvre**, **Bernhard Bruder**, **John MacLean**, **Charles Frago**, **Stephen Newman**, **Joseph Germain Jr.**, **Presley Rodricks**, **Richard Gesseck**, and **Ralph Takala**.

The committee appreciates everyone’s participation and support of this worthwhile event. We look forward to seeing you at next year’s tournament on September 22, 2014 at The Farms!

 View more photos at www.ctcpas.org/photos.

Tournament Results

First Place Gross (156)

Mike Brogan, Brett Bushnell,
Matt Gaieski, Mike Notarangelo

First Place Net (114)

Scott DeFilio, David Fonda,
Steve Kirn, Jason Potolicchio

Second Place Net (118)

Shawn Anderson, Andy Fulmer,
Bill Harju, Jason Hutchins

Third Place Net (121)

Jonathan Pardo, Paul Pelletier,
Kevin Andersen, Eric Beaulieu

Fourth Place Net (122)

Marty Crane, Sally Crane,
Brian McCain, Vincene McCain

Closest to the Line – #17 Men

Bill Buonauto

Closest to the Line – #17 Women

Sally Crane

Closest to the Pin – #8 Men

John Svez (10’10”)

Closest to the Pin – #8 Women

Jennifer Arenas (63’)





Tournament Sponsor



On-Course Beverage Sponsor



Lunch Sponsor



Player Gift Sponsor



Cocktail Hour Sponsor



Tee/Green Sponsors

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Special Thanks

ESPN
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Member News

Professional Activities



Carolyn S. Kurth, director of forensic accounting, auditing, and consulting with Sheptoff, Reuber & Company in Glastonbury, was

elected president of the board of directors for Professional Women in Construction, Connecticut Chapter (PWC-CT). PWC is a nonprofit organization committed to promoting professional, entrepreneurial, and managerial opportunities in the architectural/engineering/construction industries.

Justine Hayes, practice manager with Forensic Accounting Services in Glastonbury, was awarded the Connecticut Association of Certified Fraud Examiners Chapter Scholarship, which assists with the preparation course and exam for the Certified Fraud Examiner credential.

Greg Pepin of Reynolds & Rowella, with offices in Ridgefield and New Canaan, is participating in the Alabama Society of CPAs' Leadership Academy. The third class of Leadership Academy participants includes 37 young professionals from Alabama, Tennessee, Mississippi, Connecticut, Missouri, Nebraska, Illinois, and Toronto.

Kenneth J. Pia Jr., partner in charge of business valuation services at Meyers, Harrison & Pia in New Haven, recently spoke at the New England Chapter of the ESOP Association's Annual Fall Conference in Brewster, MA on the topic of "How Is My ESOP Stock Value Determined?" Pia also instructed the American Society of Appraisers' BV201 course, Introduction to Business Valuation, Part 1, in Chicago, IL from August 15 to 18, 2013.

Public Service

Cheri L. Bilodeau-Barton was elected first vice president/VP marketing on the 2013 Bank Compliance Association of Connecticut board of directors.

Borgida & Company in Manchester held its eighth annual fall food drive from October 1 to October 31; items were donated to the MACC Food Pantry.

In the Media

Michael Brooder, partner-in-charge of Marcum's Hartford office, was featured in the *Hartford Business Journal* article "Despite Tough Job Market, Accounting Grads Flourish."

Honors and Awards

Jeffrey M. Weiner, managing partner of Marcum, was voted one of the top five "Most Admired Peers" in the accounting industry, according to *Inside Public Accounting*.



Firm Moves and Promotions



Brenden Healy



Katy White

Whittlesey & Hadley, P.C. in Hartford announced the following appointments and promotions:

Brenden Healy to tax director;

Katy White to manager;

Jenna Bennetti, Ryan Jason, Ashley Smith, Bryan Jambard, and **Don Johnson** to audit supervisor;

Kate Donovan to audit senior associate; and

Chris Doyle to tax senior associate.

Marcum named **Brett McGrath** partner-in-charge of the firm's Connecticut Tax Department, overseeing tax services in the Hartford and New Haven offices. He is a member of the firm's National Construction Industry group as well as its State and Local Tax Practice group.

Submit Your News!

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

Headshot photographs will also be published as space allows.



Welcome, New Members!

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

New Certified Members

Paul E. Gauthier, CPA
Hartford Life
200 Hopmeadow St., Simsbury

Alisa L. Hunt, CPA
Post University
800 Country Club Rd., Waterbury

Sawyer Kimball, CPA
PwC
185 Asylum St., Hartford

Timothy L. Kwong, CPA
The Counting House
9 Quarter Mile Rd., Westport

Jonathan D. Leone, CPA
Jonathan Leone, CPA
63 Wepawaug Rd., Woodbridge

Andrew B. Limoges, CPA
Ernst & Young
300 First Stamford Pl., Stamford

Nicholas M. Mehall, CPA
Diageo
801 Main Ave., Norwalk

John Nicholson, CPA
19 Wynwood Dr.
Parsippany, NJ

Kelly M. Poudrette, CPA
Griffin Land & Nurseries
90 Salmon Brook St., Granby

Edward M. Richters Jr., CPA
Vesta Corporation
245 Hopmeadow St., Weatogue

McKinley L. Rowe, CPA
Aquarion Water Company
600 Lindley St., Bridgeport

Michael Vandeventer, CPA
Mahoney Sabol & Company
95 Glastonbury Blvd., Glastonbury

Lynn B. Wolanin, CPA
469 Hope Valley Rd., Amston

New Associate Members

Brett Averso
PwC
185 Asylum St., Ste. 2400, Hartford

Yahaira E. Carrion
CohnReznick
180 Glastonbury Blvd., Glastonbury

Brenden Cologna
PwC
185 Asylum St., Hartford

Michael P. Duffy
KPMG
755 Main St., Hartford

Sean Legier
CohnReznick
76 Batterson Park Rd., Farmington

Shailesh S. Lulla
1800 Silas Deane Hwy., Apt. 547S,
Rocky Hill

Lauren Luther
Deloitte & Touche
333 Ludlow St., Stamford

Brad McKay
333 Oenoke Rdg., New Canaan

Dustin Rider
Barron, Yanaros & Caruso
1160 Silas Deane Hwy., Wethersfield

Kyle Rounseville
Whittlesey & Hadley
147 Charter Oak Ave., Hartford

Chelsey L. Smith
Barron, Yanaros & Caruso
1160 Silas Deane Hwy., Wethersfield

Kristine Warhola
11 Somers Ln., Oxford

In Memoriam

Kathy Athorne,
member since September 3, 1999,
passed away October 6, 2013.

Craig E. Anderson,
member since June 15, 1989,
passed away July 23, 2013.

Gerald E. Barr,
member since April 21, 1960,
passed away June 19, 2013.

Cynthia M. Denya,
member since January 6, 2012,
passed away May 29, 2013.

In Memoriam: Filomeno & Company Founder Joseph D. Filomeno

Joseph D. Filomeno, founder of Filomeno & Company in West Hartford, passed away on October 6, 2013. After serving in the Army, he graduated from the University of Connecticut with an accounting degree in 1951. He established Filomeno & Company in 1966.

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Member Snapshots

Reynolds & Rowella 'Day of Caring' Benefits Tarrywile Park

Reynolds & Rowella donated a Day of Caring in August when 38 of the firm's staff and partners volunteered at Tarrywile Park, a 722-acre estate in Danbury. The firm's efforts represented almost 300 hours of work.

Volunteers trimmed foliage along 2.5 miles of hiking trails, spread three truckloads of new gravel along pathways in the Children's Garden, and tackled garden weeding and clean-up around the gazebo. The firm also donated a park bench of recycled material to be placed in the gazebo.

"It is amazing what 38 people can do during the course of one day," said Tarrywile Park's Executive Director Becky Burr-Petro.

Reynolds & Rowella began its Day of Caring in 2010 and has volunteered services on behalf of the Danbury Women's Shelter, Amos House, and WeCAHR (Western Connecticut Association for Human Rights).



(from left) Reynolds and Rowella partners Scott Crane and Ben Maini spread gravel at Tarrywile Park in Danbury as part of the firm's "Day of Caring."

Frank, Kristen Longobardi Race for a Cure in the 2013 New Balance Falmouth Road Race

CohnReznick Managing Partner – New England **Frank Longobardi** and his daughter **Kristen Longobardi** recently ran side-by-side in support of the Arthritis Foundation of New England at the New Balance Falmouth Road Race on August 11.

Frank became part of the Arthritis Foundation community 12 years ago. During more than a decade of involvement, he has chaired the Regional Board of Directors and is currently serving on the National Board of Directors. Kristen became involved because she wanted to support her father's commitment to helping people with arthritis.

At a recent National Arthritis Foundation Board of Directors meeting, Frank challenged members of the board to make donations, and they agreed, if he agreed to run the race alongside his daughter.

Together, the father-daughter team has raised a total of \$25,000 dollars to help the Arthritis Foundation.



Kristen and Frank Longobardi at the New Balance Falmouth Road Race.



Whelan Coaches Little League World Series Team

Thomas Whelan, owner of Thomas R. Whelan, CPA in Darien, served as an assistant coach for the Westport Little League All-Star Team in its first-ever trip to the Little League World Series. After becoming New England champions, the team finished second in the United States and fourth in the world. The team garnered national attention including appearances on ESPN and NESN, and was welcomed back to Westport with a parade and ceremony attended by thousands.

Submit Your Snapshots!

We're looking for your snapshots of interest to the general Society membership. Items submitted should relate to Connecticut's professional accounting community and will be included as space allows and at the discretion of the editor.

Please send your submissions to Managing Editor **Kirsten Piechota** at kirstenp@ctcpas.org.



Burzenski & Company Celebrates 30-Year Anniversary



Burzenski & Company recently celebrated its 30-year anniversary with a client, business associate, and employee celebration at the Shore Line Trolley Museum in East Haven. **John R. Burzenski**, company founder, and **Ralph L. Ricciardelli**, managing partner, addressed the crowd of well-wishers, who also had the opportunity to take a ride on a historic trolley car down the scenic Branford Electric Railway.

The Honorable **Joseph Maturo**, mayor of East Haven, presented a proclamation to the firm in honor of the occasion. State Senator **Len Fasano** also presented an official citation from the State of Connecticut General Assembly.

(from left) State Senator Len Fasano, Burzenski & Company partners Ralph L. Ricciardelli, John R. Burzenski, and Gary I. Glassman, and East Haven Mayor Joseph Maturo, pictured at the firm's 30th anniversary celebration on September 19 at the Shore Line Trolley Museum.

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General

Are your clients receiving payments from a private mortgage (purchase money mortgage), an annuity, an award from a lawsuit, or from winning the Connecticut Lottery? Are they having financial difficulty? Divorce? Estate liquidation? Concord Equity Group, LLC is Connecticut's leader in purchasing and appraising these types of receivables. Help your clients manage the sale of these assets. 860-873-0400.

CPA wanted to lease brand new Glastonbury office space with attorney and financial advisor. Opportunity for cross referrals and one-stop service for clients. \$875/month and includes utilities, common areas, waiting room, conference room, small storage. 860-986-1141 or green@ctmediationcenter.com.

Help Wanted

Accountant – Mason, DiMarco & Shaw, PC. Accounting Firm Seeks Staff Accountant for Growth Opportunity/Partnership Track. Outstanding Opportunity for Advancement. We are a successful, high-volume, small to medium-sized public accounting firm in Madison, CT serving a diverse group of clients for the past 30 years. Exceptional opportunity for growth, advancement, and potential partnership. Friendly work environment with an excellent work-life balance. Excellent pay, benefits include health insurance and a 401k plan. Candidate should have 2+ years of public accounting/tax preparation experience. Ability to complete corporate, partnership, and individual tax returns; highly motivated with excellent interpersonal skills. Please email your resume in confidence to Robert DiMarco at rdimarco@mdscpas.com or fax 203-245-3985.

Accountant – Tax – CPA firm seeking individual with 5+ years tax experience to supplement growth. Such person should have the required knowledge to complete the forms: 1120, 1120s, 1065, 1041, 1040, and related schedules. Salary negotiable, benefits included. Kindly forward your resume to: Thomas S. Monterosso, CPA, P.C., 65 Cherry St., Milford, CT 06460, Email: thomas.monterosso@snet.net, or Fax: 203-876-1690. Thank you.

ANN INC. is seeking a Senior Internal Auditor based in our Milford, CT office. If you're interested or would like to refer someone please contact us at danny.palmer@anninc.com.

Accountants – Venman & Co. LLC. We are a mid-sized public accounting firm in Shelton and have been offering quality service to our diverse client base for over 70 years. We are seeking to fill key positions on our team. Qualified candidates will have 3+ years of public accounting experience, knowledge of ProSystem Engagement and Tax a plus. Benefits include education reimbursement. Reply to recruiting@venmanllc.com, Fax: 203-929-9095, Mail: Venman & Co. LLC, 375 Bridgeport Avenue, Shelton, CT 06484, Attn: Janet Barillari.

CPA with 3 to 4 years experience – Stockwell & Bates, LLC. Hiring for upcoming tax season and beyond. Must have experience with high-net-worth individuals and business returns. Fax: 203-270-1061, Phone: 203-270-9312, Mail: 30 Church Hill Rd., Newtown, CT 06470.

Experienced Tax Preparer, Seasonal: Small CPA firm in Wallingford, CT seeking tax season assistance (full- or part-time). 5+ years experience. Prepare/review personal and/or business tax returns. Knowledge of Lacerte Software a plus. Please direct inquires and resumes to: lance831@aol.com, Fax: 203-265-1261, Phone: 203-265-1591.

Individual Income Tax Preparer – Joseph C. Bissonette & Co., LLC. Experienced part-time 1040 tax preparer needed for small Waterbury-area CPA firm. Knowledge of ProSeries a plus. Flexible hours, competitive salary. Send resume and requirements to croman@jcbcpa.com.

Seasonal Tax Preparer – CL Services. Small CPA firm in Canterbury, CT seeking seasonal assistance in preparing business and personal tax returns. Flexible hours. Must be familiar with ProSeries. Please direct inquiries to cheryl@clservicescpa.com.

Seasonal Tax Preparer – Magdefrau, Renner & Ciaffaglione, Vernon, CT is seeking an experienced tax preparer for a seasonal position (January – April) for upcoming tax season. We offer flexible hours. Professional person should have the required knowledge to complete the forms: 1120, 1120s, 1065, 1040 and related schedules. Computer skills are essential. Reply to: Theresa Renner at theresar@keynotecpas.com.

Senior Tax Manager – Nathan Accounting Group, LLC. Nathan Accounting Group is one of Connecticut's leading public accounting and professional services firms. Nathan Accounting Group - located in pleasant suburban Avon offices. Hartford's premier certified public accounting and consulting firm. Primarily serving small (but growing) to mid-market businesses throughout Connecticut, New York, and Massachusetts – This multi-discipline organization provides clients with a complete financial one stop shop. It all starts with a creative and innovative idea. Nathan Accounting Group's subject area specialists can make any businesses idea become reality. We run a very entrepreneurial practice. Skills related to delivering value and being able to appropriately bill clients will be necessary. What the Job Entails: Possess excellent interpersonal, oral, and written communication skills; Communicate with clients and staff; Network within the community; Understand tax law and how to research tax law; Prepare income tax returns; Work in a comfortable entrepreneurial environment. The Tax Manager will manage and review client engagements focusing on corporate, individual, and partnership returns. They will also team with clients to provide them with customized tax advisory services. In this position, the Tax Manager will take an active role in growing the tax practice by developing referral sources, attending networking events, and participating in business development meetings. The Tax Manager will mentor staff and act as the technical resource on tax-related issues. This is a partner-track position. Senior Tax Manager Requirements: CPA; 5+ years current tax compliance experience in public accounting; Master of Taxation preferred; Tax compliance review experience with HNW individuals, partnerships, corporations, and non-profits; Tax provision preparation and review tax research lead; Ability to develop planning strategies for clients. Email: dkaufman@nagcpa.com, Fax: 860-632-8789, Phone: 860-632-8780; Mail: 200 Fisher Dr., Avon, CT 06001.

Tax Preparer/Reviewer, Seasonal – Small CPA firm in Watertown, CT seeking seasonal assistance in preparing business tax returns and prepare/review of personal tax returns. Flexible hours. Please direct inquiries to michael@bergamocpa.com.

Tax Return Preparer – Tax Season.

Currently we have an opening for a seasonal tax preparer that is looking for an excellent opportunity where they can make a significant impact. If you are looking for tax season work preparing tax returns, then KPS & Company, LLC is what you have been searching for. Summary: 5+ years preparing individual tax returns (experience in preparing 1041s is a plus); Full- or part-time hours available. Qualifications: Bachelors degree in accounting or closely related field; CPA a plus; Experience in the preparation of tax returns (1041s a plus); Proficient computer skills are essential. Working knowledge of MS Word, Excel, and Outlook is required; Ability to effectively manage projects, work independently, and work efficiently; Knowledge of Lacerte tax software and QuickBooks a plus. About Us: KPS & Company, LLC is a local CPA firm that provides services in areas of strategic consulting, including tax, accounting and financial services. Though separate and independent legal entities, Horizon Financial Advisors, LLC (Wealth Management), Brentmore Valuation Advisors, LLC (Business Valuation and M&A Services) and KPS & Company, LLC work together to serve our clients' needs. Together they are the KPS Financial Group. Contact Info: KPS & Company LLC, Certified Public Accountants & Consultants, 18 North Main St., 3rd Flr., West Hartford, CT 06107; 860-519-1726; Careers@kpsco-cpa.com; www.kpsco-cpa.com.

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Growing firm interested in acquisitions – Bakewell & Mulhare, LLC. Well-established firm in Litchfield County is looking to acquire other small firms or sole practitioners in need of succession planning. We strive to provide our clients with the highest level of service and technical advice. We have a dedicated staff and a broad spectrum of available services. Please reply with complete confidence to Scott Mulhare at scott@bakewellmulhare.com.

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Reynolds & Rowella LLP, a leading Fairfield County CPA firm, is interested in potential acquisitions of area practices. Our areas of expertise include closely held businesses, high-net-worth individuals, litigation support, audits, and estates and trusts. We pride ourselves on providing quality, proactive solutions and services to our clients, and we are interested in discussing how we may provide solutions for your practice, too. Learn more about us at www.reynoldsrowella.com. Direct, confidential inquiries may be initiated via email to frankr@reynoldsrowella.com.

We are a growing four-partner firm in Fairfield County interested in building the major practice in our area. Accordingly, we are exploring merger or affiliation with another strong firm (or individual). For a confidential discussion, please contact Tony Cirone at Equale & Cirone, LLP by phone at 203-798-2721 or email tcirone@ecllp.com.

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