

CTCPA Women

An awards program celebrating exceptional female CPAs.

January 19, 2022 • Virtual Program

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CTCPA Women

An awards program celebrating exceptional female CPAs.

Schedule of Events

8:30 a.m. **Networking**

Welcome from CTCPA President
Brian Reilly, CPA
Senior Vice President and Chief Auditor at Travelers

9:30 a.m. **Welcome and Keynote Remarks**

Remarks from CTCPA President
Brian Reilly, CPA
Senior Vice President and Chief Auditor at Travelers

Master of Ceremonies
Margaux Farrell
Marketing Director at Root Center for Advanced Recovery

Keynote Remarks
Amy Vetter
CPA, Yogi, and Technologist Helping Create Business, Balance, and Bliss

10:00 a.m. **Presentation of Women to Watch Awards**

Marla Lewis, CPA
Practice Fellow at the Financial Accounting Standards Board and
Senior Manager at Deloitte & Touche LLP

Kaitlin Librizzi, CPA
Assurance Senior Manager at EY

Kristen Ortuso, CPA
Partner – Tax at KPMG LLP

Presentation of Distinguished Service Awards

Kathy Belfi, CPA
Director of Financial Regulation at the Connecticut Insurance Department

Sandra D. Callanan, CPA
Partner at CironeFriedberg, LLP

Susan DeRosa Jackson, CPA
Partner at KPMG LLP

Lisa M. Wills, CPA
Partner at Whittlesey

10:30 a.m. **Adjournment**

Remarks from CTCPA Executive Director and CEO
Bonnie Stewart



Keynote Speaker

Amy Vetter

CPA, Yogi, and Technologist Helping
Create Business, Balance, and Bliss



Master of Ceremonies

Margaux Farrell

Root Center for Advanced Recovery

Event Planning Committee

Thank you to these members for
their hard work planning today's
event and serving as the committee
to select our honorees.

Jenna Allegretto
Marcum LLP

Christa Clark
RSM US LLP

Anne Comer
CRC Group

Mary Manfredi
General Dynamics Electric Boat

Avril Stephens
Deloitte & Touche LLP

Women to Watch Award Honorees



Marla Lewis, CPA
Practice Fellow
**Financial Accounting
Standards Board**
and
Senior Manager
Deloitte & Touche LLP

Marla joined the Financial Accounting Standards Board as a practice fellow in September 2020. She is a senior manager in Deloitte & Touche LLP's Audit and Assurance practice, specializing in the banking and securities industries.

"It is really important to be vocal and thoughtful about the opportunities that you want," said Marla, who has a hand at creating accounting standards for businesses through her role at FASB. "I am so lucky to be part of such a great profession where you can advance while also raising a family." She is a working mother of two young children, Ike and Reid, with her husband Jason.

Marla has been recognized with the 2018 Milli Award given to an "up-and-coming" leader and millennial and was selected to participate in WINning Career Strategies, a national leadership program for high performing female managers at Deloitte.

"Through her diverse career experience, she has demonstrated she is agile, and able to perform well in high-pressure and complex scenarios. She has also built a reputation as a professional who cares deeply about engaging with the community," said Heather Ziegler, her mentor and past CTCPA Women Awards winner. While at Deloitte, Lewis served as the leader of the Stamford Office Corporate Citizenship program, Impact Day (of service), and the Pay It Forward mentorship program for senior associates.

"Having good mentors is absolutely critical," said Marla. "As a mentor myself, I take time to listen and help others navigate the many different paths in accounting. I help them get where they want to be by showing them the next steps to take."

Marla has participated in campus recruiting events for the majority of her career, most recently focusing on potential interns and campus hires. She facilitates trainings ranging from welcome sessions for interns and campus hires to technical accounting trainings for Deloitte's experienced professionals including partners and managing directors in the Stamford office.

"Marla invests time and energy in developing professionals by getting to know them and their career objectives, and then helps them identify engaging development opportunities," said Heather, who nominated Marla for the award.

Outside of Deloitte, Marla loves to cook and bake, something passed down through generations of family bakeries. She continuously challenges herself with an evolving list of things she would like to achieve. An active member of her synagogue, she also enjoys playing tennis, golf, and Mah Jongg.

Women to Watch Award Honorees



Kaitlin Librizzi, CPA
Assurance Senior Manager
EY

A rising star at EY, Kaitlin is a top performer in the Insurance Assurance practice, having led her team through the largest health insurance acquisition in history between CVS and Aetna. “What impresses me the most about Kaitlin is her ability to lead with continuous optimism and positivity,” said John Mallin, a Partner at EY who submitted the nomination along with his peers. “Kaitlin is simply fantastic. I have observed her ability to develop deep relationships with her clients and teams and, notably, that network ranges from new hires to C-suite executives.”

Kaitlin’s experience as a member of the College of the Holy Cross Women’s Basketball Team prepared her to balance professional, personal, and volunteer commitments. “We would travel on Tuesdays and Thursdays with a game in between, and then I would have to come back and find a way to catch up on all the accounting work and exams I had missed,” she said.

A new working mother of 8-month-old Knox, Kaitlin is dedicated to the advancement of women in the profession, often sharing strategies and tips to achieve work-life balance. She serves as co-chair of the EY Connecticut Professional Women’s Network and is a driver of diversity, equity, and inclusion initiatives in the Hartford office. “Kaitlin is an enthusiastic leader who sets an excellent example for the young women (and men) in our firm,” said Erin Murphy, Partner at EY.

Since high school, Kaitlin has loved accounting, especially challenging fact patterns and transactions. “The accounting profession provides young professionals with so many different opportunities. Accountants have a seat at the table when companies are making their most strategic business decisions. I encourage young professionals to embrace challenges, lead with empathy, and always assume positive intent of their teammates. No day is like the other in accounting, but that’s the best part of being a CPA!”

Her strong work ethic and grit is modeled after her parents, who always worked hard to achieve success in their hometown of Springfield, Pennsylvania. Active in the Hartford business community, Kaitlin serves on the Audit and Finance committees of The Hartford Stage as part of its Stage One young professionals mentorship program, as well as on the EY Hartford People Advisory Board, where she is an integral part of the COVID planning team and EY’s New Way of Working initiatives.

Women to Watch Award Honorees



Kristen Ortuso, CPA
Partner – Tax
KPMG LLP

As a young girl, Kristen would read her father’s accounting textbooks with great interest. “I enjoyed the organization of it all,” she said. While studying at the University of Connecticut in 2006, she became an intern at the KPMG Hartford office and has been there ever since. In 2021, she was promoted to tax partner and is involved nationally with the firm’s technical and technology initiatives. “I wouldn’t be where I am today without the help of my husband. It really has been a team effort as we balance raising our two young sons while growing our careers.”

Kristen shares her experiences in work-life balance as a local leader of KPMG’s Network of Women (KNOW). She is also a highly effective role model for staff and managers interested in developing strong technical, client relationship, and business skills.

Throughout the COVID pandemic, she has been able to successfully navigate parenting, juggling working from home, childcare, and homeschooling a school-aged child. She is also engaged with her older son’s many extracurricular activities.

“She fully supports the needs of her managers and staff and promotes workplace flexibility as not just a feature of a career at KPMG, but a necessity to be successful,” said Mark Caplan, KPMG partner and nominator. “She is candid and honest about the challenges she faces as a working mother to help others understand that balance is not only important but welcomed.”

“It is so important to strike a balance and to give yourself grace,” said Kristen. “You won’t be able to get through your to-do list every day. You just have to find what works best for you and your family.”

Kristen was recognized as a Stacey Lewis Rising Star in 2016 and was a recipient of the Local Office Chairman’s Award. She has also participated in many KPMG leadership development programs including the Tax Management Leadership Council, the Lead Tax Partner Academy, and the KPMG Leadership Advantage Program at Cornell.

Kristen finds time to give back as a member of the World Affairs Council of Connecticut Board of Directors, where she also serves on the Executive and Nominating & Governance committees.

Distinguished Service Award Honorees



Kathy Belfi, CPA
Director of Financial Regulation
**Connecticut Insurance
Department**

At a young age in Farmington, Kathy witnessed the strong work ethic of her mother, a bookkeeper with the state, and her father, an entrepreneur. “I thought if I had an accounting degree I could do anything I wanted to do,” she said.

In the early 1990s she joined the audit department with the State of Connecticut and worked her way up to become the Director of the Financial Regulation Division, where she is responsible for the financial solvency oversight of some of the most complex Property and Casualty, Life and Health insurers in the world.

While Kathy has overcome unexpected life challenges, the cancer survivor has made it her calling to mentor young female accounting professionals and encourage them to use their creativity and be confident and vocal with their ideas.

Kathy leads a staff of 60 individuals, including CPAs, financial analysts and examiners, legal, and other support professionals, whose collective work is a critical part of the Department’s mission. “I love working for the state because I am giving back through consumer protection,” she said. “The talent pool here in Connecticut has always been exceptional. I was able to hire more than 10 new employees during COVID.”

Developing national policy to regulate insurance, Kathy has served on 20 National Association of Insurance Commissioners working groups, several which she chaired. In 2013, she was nationally recognized as a co-recipient of the organization’s Robert Dineen Award for outstanding contributions to state insurance regulation and advancement of the insurance regulatory profession. Five years later, she was honored by the AICPA with the National State Government Impact Award for her leadership role in creating efficiency, effectiveness, and innovative service delivery.

In 2020, Kathy took on the role to lead the Division through the unprecedented COVID-19 crisis. She oversaw the work-from-home program for Division employees, ensuring critical functions continued. Looking forward to retirement in the near future, Kathy plans to volunteer with hospice, and will continue to seek peace and comfort through nature hikes once her broken ankle has healed.

Women to Watch Honorees



Sandra D. Callanan, CPA
Partner
CironeFriedberg, LLP

Sandra has more than 35 years of accounting, audit, and tax experience. She has provided services to financial institutions, closely held businesses in wholesale, retail, real estate and development services, manufacturing, and physician groups, but she most loves working with not-for-profit organizations.

“The accounting for not-for-profits is a little complicated, but it feels really good to give back,” she said, sharing her mother was a bookkeeper and she would help her by adding up all the columns on the adding machine for a cosmetics business. “I knew back then I wanted to do that kind of work, but I wanted to be the boss and thought that being a CPA would get me there.”

“The work in our profession is changing. We are constantly learning new things. There is less compliance work and we now have evolved to provide much more advisory services,” said Sandra. “Public accounting provides the perfect opportunity for those who like to be challenged every day, to learn every day, and to assist business owners and not-for-profits in understanding financial complexities.”

Sandra has had a long career as a CTCPA volunteer, serving on numerous committees as well as the Board of Governors. Recently she served two terms as a member of the Nominating Committee, a vital role in identifying future leaders of the organization. She is also an active member of the Not-for-Profit Organizations Committee. CTCPA Executive Director Bonnie Stewart is grateful for Sandra’s relentless commitment to growing the organization and providing guidance to her younger peers.

She is a singer who began performing at a young age in high school and then college. She now sings with the award-winning Harmony on the Sound Chorus in Trumbull, as well as serves as its volunteer financial coordinator.

A dog lover and self-proclaimed adrenaline junkie, she takes care of five retired racing Greyhounds, has done skydiving, flown in stunt planes and WWII planes performing aerobatic maneuvers, and rappelled down the side of an 18-story building in Bridgeport for charity.

Women to Watch Honorees



Susan DeRosa Jackson, CPA

Partner
KPMG LLP

Growing up in Hamden and following in her accountant father's footsteps, Susan entered the field as an intern with a Big 8 firm in New Haven and never looked back, joining KPMG in 1993. "My first accounting teacher told me I was a natural at it," she said. "The accounting profession can be challenging and overwhelming until you hit your groove. I developed a sense of self and learned to feel confident even if I was the youngest person in the room and often the only woman. I have enjoyed the variety of clients and learning different industries. No year is ever the same."

While her 30-year career yielded the opportunity to serve clients in the insurance and healthcare industries all over the U.S. and abroad, Susan has remained steadfast in keeping her home base in Connecticut and works tirelessly to recruit new talent from universities across the country to work here in Hartford. "I have enjoyed the travel this career has allowed me to experience. I have learned so much from gaining exposure to CEOs, CFOs, and board members early in my career, much earlier than I would have in most other jobs – learning life lessons, watching them lead, and getting to be in the room where it happens is motivating and exciting," she said.

"Technology is changing the field in dramatic ways, and one of the positive aspects of this is professionals can focus more on the interesting aspects of technical accounting and auditing versus mundane tasks which are now automated," said Susan.

Thomas M. Daugherty, partner at KPMG Hartford who nominated Susan, said "Sue has helped many women ascend to partner and continues to support their careers as working mothers." Throughout her career she has been known to never miss her daughter's dance or school events. She ran the book fair, participated as a "class mom," and served as treasurer on the Renbrook School Parent Association. She also served on the advisory board at Choate Rosemary Hall and often volunteered time at the school.

"I believe with my whole heart this profession has allowed me to be my best self not only in work, but it has allowed me to balance being a mom and individual person as well," she said. "I hope we can all be together soon so new accountants can experience the social, teaming, travel, and collaborative part of this exciting field."

For 20 years, Susan has served on the Junior Achievement of Southern New England board, and as treasurer over the last decade, earning her 2020 JA Partners in Achievement Award. She volunteers in the classroom for JA and has helped the organization navigate, survive, and thrive during the 2008 U.S. financial crisis and the more recent COVID pandemic.

One of Susan's talents is planning memorable and creative events of all kinds. "I am definitely a Martha Stewart 'wanna be.' It gives me such joy to plan events for friends and family and go above and beyond expectations. Maybe when I retire, I will find a way to use my party planning skills more often!"

Women to Watch Honorees



Lisa M. Wills, CPA
Partner
Whittlesey

The first woman leader of Whittlesey's nonprofit practice, Lisa is most proud to be a role model for her daughter. "Everyone needs advocates in their lives. I am committed to help young women along in their careers and give them the tools they need," she said, admitting she was lucky to have several mentors at a young age. "While accounting is challenging, it is very rewarding work. You can have a career with flexibility and work-life balance."

Lisa co-founded and co-chairs the Women of Whittlesey (WoW) leadership group, and earlier in her career served as chair of the Hartford Office chapter of KPMG Network of Women.

"Lisa invests just as much energy inside the office as she does with her clients," said Drew Andrews, firm partner who made the nomination. "With her youthful excitement and compassionate nature, Lisa has become a natural mentor for the younger generation in the office, particularly for emerging female leaders."

A single mother of two, Lisa worked her way up to partner in two accounting firms and found her passion working with nonprofits. Her work ethic and expertise have helped to elevate Whittlesey as a trusted advisor in the field.

"Lisa has been vital in adapting our nonprofit services to address the current financial pressure Connecticut nonprofits are facing," said Andrews. "She was instrumental in helping our nonprofit clients navigate the Paycheck Protection Program, and not only survive but thrive through the pandemic."

Over the years, Lisa has served on numerous boards and committees, including Board of Trustees member and chair of the Finance Committee for Mercy High School, and past chair of the CTCPA's Not-for-Profit Organizations Committee. In addition to her board position, she is also an active participant in the firm's volunteer/community activities, including Whittlesey's Community Day and nonprofit sponsorships, events, and fundraisers.

Lisa has written articles featured in the *Hartford Business Journal*, *BusinessWest*, *University Business Magazine*, and was featured in the *Connecticut CPA* magazine article on women in accounting firm leadership.

Outside of work, she is an ardent supporter of local youth sports and music, the Girl Scouts, and has hosted foreign exchange students in her town.