

Spring 2018

Connecticut CPA

Advocacy. Community. Education.



State
of the



*Where we've been ...
where we're headed.*



A publication of the Connecticut Society of Certified Public Accountants

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It's Dues Renewal Time!

We are living and working in a time of extraordinary change. Thank you for supporting Connecticut's professional accounting community as we **learn, adapt, and thrive together.**



PDF dues invoices are sent via email in early May.

You can easily print or forward this PDF. If you don't have an email address with us on file, we'll send your invoice via mail.



As always, you can quickly and easily renew online.

Simply log in to our secure website at www.ctcpas.org/dues. If you haven't yet created an account, you'll need your last name and member ID number to get started.



Are there multiple members at your firm or business? Request a company invoice.

We'll send you an invoice listing all the members at a single location and give you the opportunity to indicate any members who have joined or left your company. Please contact **Liz Frazza** at lizf@ctcpas.org or 860-258-0220.



Didn't receive your invoice or need to update your contact information?

Please contact **Liz Frazza** at lizf@ctcpas.org or 860-258-0220. She'd be happy to help. You can also update your contact information online at www.ctcpas.org/update.

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Society of Certified Public Accountants

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Editor's Note

The State of the CTCPA: Where we've been, where we're headed

Welcome to the inaugural "State of the CTCPA" issue of *Connecticut CPA*! At our winter Regional Meetings we distributed two-sided update sheets to fill in attendees about the newest programs, initiatives, and advocacy efforts we had implemented based on member feedback since the first set of meetings we held last spring.







So many people told us they loved to see what was happening in this easy-to-read format that we decided to put together a full report to give you a year-at-a-glance update just in time for the May Annual Meeting.

Often annual reports and other such organizational updates have a limited print run. We wanted to make sure we put a copy of this report in each and every member's hands, so we decided that *Connecticut CPA* was the perfect vehicle to make this happen. You'll still see our usual member news and events in the front half of the issue, but the second half is devoted entirely to this year's retrospective.

It's great to look back at the year just completed, but we're looking ahead, too. We have been carefully investigating how to best diversify our communications strategy to reach the most members and potential members in the most effective and relevant ways possible; some changes are coming! This issue, for instance, is dated "Spring 2018" instead of "May/June 2018." We will be changing the *Connecticut CPA* frequency to quarterly (Winter, Spring, Summer, and Fall issues) to allow us to allocate resources to producing additional brief and targeted print pieces – think quick-read mailers and postcards.

Print remains an important medium to get our message out to you, but you've probably seen us stepping up our game on the digital front recently as well. Our Member eNews now comes to your inbox twice as often as before to make sure we get breaking news to you when you need it. Capitol Corner advocacy updates go out in a separate communication powered by our VoterVoice grassroots advocacy software.

Social media's reach has been growing rapidly in recent years, too. In fact, one in every three minutes online is spent on social networking, according to consumer behavior research firm comScore. To that end, we'll be working to produce more digital and interactive content – things like infographics, polls, and videos. If you haven't already followed us on your favorite social media channels, please take a moment to do so today!

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See you next issue,

Kirsten Piechota, Managing Editor

2018 CTCPA Annual Meeting

Accounting in Extraordinary Times

How technology advances will make the accounting profession "unrecognizable" in the next 10 years.

Cybersecurity • Blockchain • Artificial Intelligence • Data Analytics

Wednesday, May 16, 2018

Cascade, Hamden

Members: \$50, Nonmembers: \$65 • CPE credit: 1 hour

5:30 p.m. – Check-in and light refreshments

6:00 p.m. – Business meeting and program

7:30 p.m. – Networking hour with wine, beer, and hot hors d'oeuvres (cash bar available)



Keynote Speaker
Barry Melancon

The accounting profession will be "unrecognizable" in 10 years, according to American Institute of CPAs President and CEO Barry Melancon, CPA, CGMA.

Barry will guide us through some of the technologies that are bringing disruptive change to not only the accounting profession but the entire world as we know it. Cybersecurity, blockchain, artificial intelligence, data analytics, and cognitive technologies are on course to radically alter the way businesses perform compliance, tax, and financial forecasting functions.

Learn how the profession will need to evolve to stay ahead and remain relevant in this new reality.

Learn more and register at www.ctcpas.org/annualmeeting.

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From the Executive Director

Spring has brought some exciting changes to us here at the CTCPA.

Meeting and Event Planning Initiatives

We have recently welcomed new staff member **Cindy Panioto**, who will serve as our new business development and event manager. Cindy comes to us with an extensive background in meeting and educational program planning and will work closely with Professional Development Director **Lisa Bugryn** and Membership Director **Alicia Strong**. As the needs of the CPA community continue to evolve and become more diverse, we want to ensure we are providing both the educational programs and networking opportunities necessary to meet all of our members' needs.



Cindy Panioto

Thanks to her prior role as a conference and event planner for the Connecticut Business and Industry Association, Cindy has an extensive network of contacts within both the accounting and business communities to help with that work. Cindy will also be joining the team of CTCPA staff hitting the road to meet with members at their firms and companies and at many of our meetings held throughout the state. She will also work with Strategic Relations Coordinator **Tyler Losure** to develop new partnerships with vendors and other providers who can help our members grow their businesses in today's ever-changing world.

Peer Review and Ethics Program Changes

Our peer review program is another area where we have had extensive changes, due in large part to a significant restructuring of the AICPA's program as well as the retirement of longtime peer review and ethics program administrator **Bonnie Olivieri**. (We wish Bonnie the best in her next endeavors!)



Julie McNeal

One of the many new peer review requirements is that the program be overseen by a CPA. The CTCPA is in a good position to administer the program successfully for our members and the public because we are fortunate to have a CPA who is very familiar with peer review and the profession on our staff. Director of Finance **Julie McNeal, CPA** will now be responsible for the peer review program and working with our technical reviewers.



Lynette Lindner

In the meantime, CTCPA staffer **Lynette Lindner** has been busy learning the ethics program requirements so she can serve as the liaison to members and the public on ethics issues.

Legislative Developments at the Capitol

As this issue went to press, the end of the legislative session was nearing and the statuses of bills and proposals of interest to the profession and the business community were changing rapidly. Please be sure to check your email for Capitol Corner updates or find the latest news at www.ctcpas.org/capitolcorner.

Bonnie Stewart, Executive Director



Regional Meetings

Reserve your space at www.ctcpas.org/regionalmeetings.

Space is limited. Pre-registration is required. Each meeting includes one credit of CPE.

Back by popular demand, Executive Director **Bonnie Stewart** and CTCPA staff members will be visiting cities and towns across the state again this spring. Each meeting will kick off with an update on activity at the State Capitol, the State Board of Accountancy, regulatory agencies, and the CTCPA. Then we'll open the floor to discussion and feedback.

Many of this year's new initiatives were born out of suggestions from Regional Meetings. Be sure your voice is heard by joining us for this dialogue in your backyard!

Rocky Hill

Thursday, May 10 • 8:00 - 9:00 a.m.
CTCPA Education Center, Rocky Hill

A CTCPA Not-for-Profit Organizations Committee meeting will immediately follow this Regional Meeting. Consider joining us for both! See details on the page at right.

Norwich

Tuesday, May 15 • 8:00 - 9:00 a.m.
DXC Technology, Norwich

Bridgeport

Wednesday, May 30 • 8:00 - 9:00 a.m.
People's United Bank, Bridgeport

Torrington

Tuesday, June 12 • 8:00 - 9:00 a.m.
Northwest Connecticut Chamber of Commerce, Torrington

Bethel

Wednesday, June 13 • 8:00 - 9:00 a.m.
CironeFriedberg, Bethel

North Haven

Thursday, June 14 • 8:00 - 9:00 a.m.
Ulbrich Stainless Steels & Special Metals, North Haven

Middletown

Wednesday, June 20 • 8:00 - 9:00 a.m.
Middlesex County Chamber, Middletown

Waterbury

Tuesday, June 26 • 8:00 - 9:00 a.m.
Chase Collegiate School, Waterbury

Stamford

Wednesday, June 27 • 8:00 - 9:00 a.m.
Deloitte, Stamford



Engage. Connect. Progress.

MEMBER Meetings

Have questions or want to learn more? Contact **Cindy Panioto** • cindyp@ctcpas.org • 860-258-0213.

Several member meetings have been scheduled and there are many more to come this spring and summer. Register and find more at www.ctcpas.org/membermeetings.



Technology Breakfast Roundtables

Thursday, May 17 • 8:00 a.m.
Cristy's Luncheonette, Westbrook

Wednesday, June 20 • 8:00 a.m.
Riverdale Diner, Shelton

Thursday, July 19 • 8:00 a.m.
New York Pickle Deli, Rocky Hill

This is an informal open forum – we never limit discussion. We have experts on board who can help you with portals, paperless office, IT security, e-filing, and more. There is no need to register – walk-ins are welcome and members purchase their own breakfasts.



The Friday Focus for Members in Industry
CTCPA Education Center, Rocky Hill
8:30 - 10:30 a.m. • CPE Credits: 2 • Free

These free two-hour educational programs are specifically designed for members working in business and industry.

Federal Pass-Through Entities

Friday, August 17

Speakers: Robert L. Day III, David O. Bigger, and Radhika Tahiliani, Shipman & Goodwin

Save the date for these upcoming programs:

Friday, September 21	Friday, November 16
Friday, October 19	Friday, December 14



Not-for-Profit Organizations Committee: FASB Not-for-Profit Accounting Standards Update

Thursday, May 10 • 9:00 - 11:00 a.m.
CTCPA Education Center, Rocky Hill
CPE Credit: 1

***New time!** This meeting will now immediately follow the May 10 Rocky Hill CTCPA Regional Meeting (details on the page at left). We'd love to have you attend both – and pick up a second hour of free CPE!*

Join us for a discussion of FASB's *Proposed Accounting Standards Update – Not-for-Profit Entities (Topic 958): Clarifying the Scope and Accounting Guidance for Contributions Received and Contributions Made*.



Torrington CONNecTion

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

This Litchfield County/Greater Waterbury educational series features professional, regulatory, and economic topics.

Cybersecurity Awareness: Protect Your Business

Tuesday, May 15

Speaker: Tim Weber, ADNET Technologies

Save the date for these upcoming programs:

Wednesday, July 18	Wednesday, November 14
Wednesday, September 19	



Easton CONNecTion

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

This Fairfield County educational series features professional, regulatory, and economic topics.

Passwords and Hackers: What You Need to Know

Thursday, May 17

Speaker: Eric Monda, ADNET Technologies

Save the date for these upcoming programs:

Thursday, June 21	Thursday, October 18
Thursday, August 16	Thursday, November 15
Thursday, September 20	Thursday, December 20



CFO/Controller Roundtable: Three Strategic Partners Every CFO/Controller Should Know

Thursday, June 14 • 8:00 - 10:30 a.m.
CTCPA Education Center, Rocky Hill

Join us for this roundtable meeting designed exclusively for CFOs and controllers to meet to discuss issues, share ideas, and hear from experts. This program will include a formal program as well as time for networking and idea sharing.

2018 CPE Calendar

Seminars and Conferences

Date	Title	Express Code	Location	CPE	Member Standard/Early	Early Bird Good Through
May 2018						
5/17	Fiduciary Income Tax Returns: Form 1041 Workshop with Filled-In Forms	1041-A	Rocky Hill	8	\$304/\$269	5/2/2018
5/18	Top 50 Mistakes Practitioners Make and How to Fix Them: Individual Tax and Financial Planning	INBB	Rocky Hill	8	\$304/\$269	5/3/2018
5/21	Tax Considerations and Consequences for Closely Held Businesses	CHTX	Rocky Hill	8	\$304/\$269	5/6/2018
5/22	Compilations, Reviews, and New Preparations: Engagement Performance and Annual Update	CRAU	Rocky Hill	8	\$304/\$269	5/7/2018
5/22	Form 990: Mastering Its Unique Characteristics	EOF990	Cromwell	8	\$304/\$269	5/7/2018
5/22	Tax Practitioner Responsibilities and Ethics (Morning Session)	TAXE4	Cromwell	4	\$160/\$140	5/7/2018
5/23	Governmental Accounting and Auditing Conference	GAA	Rocky Hill	8	\$304/\$269	5/8/2018
5/24	The Essential Course for Preparing Not-for-Profit Financial Statements Under ASU No. 2016-14	ENFP	Rocky Hill	8	\$304/\$269	5/9/2018
5/25	Accounting, Audit, and Attest Update for Practitioners with Small Business Clients	SMBP	Rocky Hill	8	\$304/\$269	5/10/2018
5/29	Accounting and Reporting for Not-for-Profit Organizations	FSNPO	Rocky Hill	8	\$304/\$269	5/14/2018
5/29	Social Security, Medicare, and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now	SSRB	Rocky Hill	8	\$304/\$269	5/14/2018
5/30	Applying the Uniform Guidance in Your Single Audits	INUG	Rocky Hill	8	\$304/\$269	5/15/2018
5/30	Determining How Much Money You Need to Retire: Practical Planning Strategies	DRMM	Rocky Hill	8	\$304/\$269	5/15/2018
5/30	Winning the Fraud Battle in the Digital Age: Prevention and Detection	CFVV	Rocky Hill	8	\$304/\$269	5/15/2018
5/31	Advanced Concepts in SSARS 21 and Nonattest Services: Are You Certain You're in Compliance?	SS21	Shelton	8	\$329/\$294	5/16/2018
5/31	Employee Benefit Plans Conference	EBP	Rocky Hill	8	\$304/\$269	5/16/2018
5/31	How to Settle a Client's Estate	SEAZ	Cromwell	8	\$304/\$269	5/16/2018
June 2018						
6/1	Complete Trust Workshop	TCTW	Rocky Hill	8	\$304/\$269	5/17/2018
6/1	FASB's "Big 3" – Revenue Recognition, Leases, and Financial Instruments	FSBT	Shelton	8	\$329/\$294	5/17/2018
6/1	Real-World Fraud Found in Governments and Not-for-Profits	RFGN	Rocky Hill	8	\$304/\$269	5/17/2018
6/4	A Practical Guide to Trusts	PGTT	Shelton	8	\$329/\$294	5/20/2018
6/4	Hot IRS Tax Examination Issues for Individuals and Businesses	EXIB	Rocky Hill	8	\$304/\$269	5/20/2018
6/4	Studies on Single Audit and Yellow Book Deficiencies	SAYB	Rocky Hill	8	\$304/\$269	5/20/2018
6/5	AICPA's Annual Update: Top 12 Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs	TGNP	Rocky Hill	8	\$304/\$269	5/21/2018

▶ Ready to register?

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



New & Young Professionals Events 2018

Learn more and register for these events at www.ctcpas.org/nyp.

These programs are open to members aged 35 and younger.



Thursday, May 3 • 5:30 - 7:30 p.m.
**Joint Happy Hour with Young Lawyers
Section of Lower Fairfield County**
Dinosaur Bar-B-Que, Stamford



Wednesday, June 6 • 6:30 - 9:00 p.m.
Dodgeball Tournament
Nomads Adventure Quest, South Windsor



Saturday, August 4 • 8:00 a.m. - noon
New Haven Craft Brew Road Race
Edgewood Park, New Haven



Saturday, August 18 • 10:00 a.m. - 2:00 p.m.
Charity Kickball Tournament
Norton Park, Plainville



Thursday, September 27 • 6:00 - 9:15 p.m.
Moonlight Ziplining
EMPOWER Leadership & Adventure Center,
Middletown



Thursday, October 11
Golf Scramble
Location: To be determined – Stamford area



Thursday, October 25 • 6:30 - 8:30 p.m.
Trivia Night
Bobby V's Trivia, Windsor Locks



Thursday, November 15 • 8:30 a.m. - 4:30 p.m.
**New and Young Professionals
Leadership Conference**
CTCPA Education Center, Rocky Hill



Thursday, December 6 • 6:30 - 10:00 p.m.
Mingling & Merriment Holiday Party
Society Room of Hartford, Hartford



Breakfast Roundtable Meetings

We've expanded our popular breakfast roundtable meetings at locations in Hartford, New Haven, and Fairfield counties. Each program includes breakfast, a brief professional development speaker, and informal networking.

Tuesday, May 22 • 8:15 - 9:15 a.m.
No One's "Too Small" for Cybersecurity
Location: ADNET Technologies, Farmington
Speaker: Eric Monda, ADNET Technologies

Tuesday, June 12 • 8:00 - 9:00 a.m.
**Exploring Best Practices and Real-Life
Scenarios When Navigating Your Career**
Location: RSM, Stamford

Tuesday, July 24 • 8:15 - 9:15 a.m.
Networking with a Purpose
Location: CTCPA Education Center, Rocky Hill
Speaker: Bonnie Stewart, CTCPA

Wednesday, September 12 • 8:15 - 9:15 a.m.
Blockchain and Bitcoin in Business
Location: CTCPA Education Center, Rocky Hill
Speaker: Michael Luntta, ADNET Technologies

Tuesday, September 25 • 8:00 - 9:00 a.m.
New Haven-Area Breakfast Meeting
Location: To be determined – Shelton/New Haven area

Tuesday, December 4 • 8:00 - 9:00 a.m.
Fairfield-Area Breakfast Meeting
Location: To be determined – Fairfield area

Thursday, December 13 • 8:15 - 9:15 a.m.
How to Manage That Critical Inner Voice
Location: CTCPA Education Center, Rocky Hill
Speaker: Maureen Gemme, Emerge Leadership Academy



Member News

Send your news to **Caitlin Bailey O'Neill** at caitlinb@ctcpas.org. Headshot photographs will also be published as space allows.



Brian Vendig

Brian H. Vendig, president and managing executive of MJP Wealth Advisors in Farmington and Fairfield, was recognized as one of Connecticut's "Best-in-State Wealth Advisors" by *Forbes* magazine.

The partners of **Guilmartin, DiPiro & Sokolowski, LLC** in Middletown announced that the firm has joined the BDO Alliance USA, a nationwide association of independently owned accounting, consulting, and service firms.

Kevin Harris, a senior accountant with MahoneySabol in Glastonbury, Middletown, and Essex, has joined Central Connecticut State University's Institute of Technology and Business Development Advisory Committee. The institute helps support growing Connecticut businesses and organizations.



Rick Richardson

Rick Richardson, founder and CEO of Richardson Media and Technologies in Canton, was one of three experts featured in the February *Journal of Accountancy* podcast "How AI, blockchain, and automation will reinvent accounting."

Congratulations to the CTCPA members at the following companies, which were named among the *Hartford Business Journal* "Best Places to Work in Connecticut 2018."

Small/Medium Companies

1. **Connecticut Wealth Management**
2. **Nicola Yester**

Large Companies

6. **Datto**
9. **Citrin Cooperman & Co.**
10. **Barnum Financial Group**



Edward Pratesi

Edward Pratesi and **John Salemi** of UHY Advisors N.E., LLC participated in a panel discussion for the Connecticut Estate and Tax Planning Council on the Tax Cuts and Jobs Act of 2017 entitled "Predicting the Winners and Losers – Is it Possible?" Ed focused on the business valuation aspects while John focused on the individual aspects of the legislation.



John Salemi

business valuation aspects while John focused on the individual aspects of the legislation.



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Company Moves and Promotions

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Member in Action



Shelly Panico

Shelly A. Panico joined Burzenski & Company, P.C. in East Haven as a tax supervisor. Shelly specializes in individual taxes, trusts and estates, gift tax, and closely held businesses.

Member in Action



Patrick Duffany

CohnReznick LLP appointed **Patrick Duffany** as the new managing partner of the firm's tax practice. Patrick previously led the firm's state and local tax and national tax consulting practices. He is chair of the CTCPA State Tax Committee.

Member in Action



Donna Pengel

Donna Pengel joined Whittlesey in Hartford as a director in the firm's healthcare consulting services division. She is responsible for expanding the firm's advisory services to medical practices and providers. Donna has more than 20 years of experience providing accounting, tax, and advisory services to the health-care industry.

Member in Action



Michael Jodon

CironeFriedberg, LLP in Bridgeport has announced that **Michael P. Jodon** joined the firm as a partner. Mike focuses in the tax area, managing relationships with middle market privately held and family-owned businesses as well as high-net-worth individuals. In addition, **Anthony R. DeLucia Jr.** joined the firm as an audit manager.

Guilmartin, DiPiro & Sokolowski, LLC in Middletown promoted **Dylan Stumpf** to supervisor and **Daniel Slepski** to senior accountant. Dylan specializes in auditing of nonprofit organizations, preparation of individual and business tax returns, and book-keeping for clients. Dan's expertise is in auditing nonprofit organizations and preparing tax filings for individuals and other entities.

Marks Paneth LLP announced that the partners and staff of **Dylewsky, Goldberg & Brenner, LLC** have joined the firm. The acquisition brings two partners, **Scott M. Brenner** and **Dannell R. Lyne**, one director, **Lawrence S. Goldberg**, and eight professionals to Marks Paneth. It is the firm's first Connecticut office.

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Welcome, New Members!

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

New Certified Members

- Amie Allegro, CPA**
EY
- Hussein Alibhai, CPA**
KPMG
- Dilyana Antevil, CPA**
KPMG
- Andrew Bologna, CPA**
EY
- Stephen Borsy, CPA**
EY
- Lyndsey Broderick, CPA**
KPMG
- Hassan S. Butt, CPA**
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- Autumn Carlton, CPA**
KPMG
- John Coutsouradis, CPA**
KPMG
- Richard DiLorenzo III, CPA**
KPMG
- Christopher A. Eng, CPA**
KPMG
- Lauren Gorski, CPA**
EY
- David J. Hasso, CPA**
New York Comptrollers Office
- Joseph Jinjika, CPA**
Waterlogic USA
- Cori L. LeDoux, CPA**
KPMG
- Jonathan Lipschutz, CPA**
EY
- Thomas G. Lombardi, CPA**
Supreme Industries, Inc.
- Sean McDonnell, CPA**
KPMG
- Jeremy Newell, CPA**
PwC
- David Pergola, CPA**
KPMG
- Kristen L. Riner, CPA**
KPMG

New Associate Members

- Andrew C. Robertson, CPA**
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- Timothy J. Rustek, CPA**
SS&C Technologies, Inc.
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Ownership Potential – New Haven County CPA looking for talented CPA interested in taking over firm operations and eventually ownership. Revenue base 725K. Good growth and income potential for experienced professional ready to move forward with future ownership within 2-3 years. Please respond online at www.ctcpas.org/ownershippotential.

Help Wanted

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.

Mergers/Acquisitions

Accounting Practice Sales: Litchfield County CPA practice grossing \$125K; Lower Fairfield County CPA practice grossing \$200K. For more info regarding these listings or to sell your practice, contact Lori Newcomer, CPA and Tim Price, CPA at 888-553-1040 or PNgroup@APS.net, or visit www.AccountingPracticeSales.com.

CPA firm would like to buy all or part of your accounting, tax, or investment practice. Call Mark J. Mazzone of D'Agostino & Mazzone at 860-257-4005.

Merger Or Sale – Local Central Connecticut firm seeks sale or merger with area firm. Practice consists of tax and income tax basis financial statements services. Good client base. Respond to: r.c.central@hotmail.com.

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

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www.ctcpas.org/classifieds

Cost

Members: \$2 per word

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Support scholarships for tomorrow's CPAs at the Educational Trust Fund Golf Tournament.

Monday, September 24
The Farms Country Club, Wallingford
Individual registration fee: \$250

Tournament Sponsor

rh Robert Half®

Make a great event even better – become a sponsor.

\$2,500 Sponsorships

- Cocktail Hour
- On-Course Beverages
- Carts
- Player Gift
- Lunch

Golf Ball Sponsor

Provide a sleeve of balls for 120 players.

\$250 Tee/Green Sponsor

Includes signage on tee or green.

Raffle Donor

We're always looking for quality raffle prizes – gift certificates, electronics, concert or sporting event tickets, etc.

\$1,500 Sponsorships

- Driving Range
- Putting Green

\$1,200 Gold Sponsor

Includes tee/green signage and four player spots.

All tournament proceeds support grants and scholarships for aspiring CPAs.

Register at www.ctcpas.org/golf.

For more information or to become a sponsor, contact **Liz Frazza** at 860-258-0220 or lizf@ctcpas.org.





Member Snapshots

We're looking for **your** snapshots!

Show us what you're up to! Submit your photos to **Kirsten Piechota** at kirstenp@ctcpas.org.

RSM US Donates More Than \$36,000 to March of Dimes



RSM US presented the March of Dimes with a check for \$36,373 as a result of the firm's employee-led Birdies Fore Love campaign in Connecticut.

Birdies Fore Love is RSM's charitable giving platform for The RSM Classic, a PGA TOUR event for which RSM is the title sponsor. Birdies Fore Love supports deserving local and national nonprofit organizations focused on enhancing educational outcomes and the quality of life for children and families. This year, RSM's Connecticut market employees selected March of Dimes as its Birdies Fore Love charity, which resulted in several employee-run fundraising initiatives. RSM Connecticut's donation to March of Dimes was also supported with matching funds from the RSM US Foundation.

Pictured are (from left) Greg Budnik (Connecticut Market Managing Partner, RSM), Cindy Lopane (Senior Development Manager, Greater New York Market, March of Dimes), Deborah Poudrier-Fafard (Executive Director, Connecticut/Western Massachusetts Market, March of Dimes), Keely McMullin (Development Manager, Fairfield County, Connecticut, March of Dimes), Jeff Erlingheuser (Manager, Tax Services, RSM), Ryan McGurk (Manager, Assurance, RSM), and Doug Turner (Senior Manager, Tax Services, RSM).

Crowe Horwath Volunteers for Boys and Girls Club of Bristol



Pictured (from left) are Niki Garceau (Tax Senior), Michelle Durej (Operations Manager), Dave Dudas (Tax Senior Manager), a fellow volunteer from another company, Sandy Reeves (Tax Business Support), and Barbara Caffary-Cortesi (Audit Business Support).

Staffers from Crowe Horwath's Simsbury office volunteered at the Mommy/Son Valentine's Day Dance held by the Boys & Girls Club of Bristol Family Center.

The team helped make popsicle stick picture frames with the kids and had a great time!



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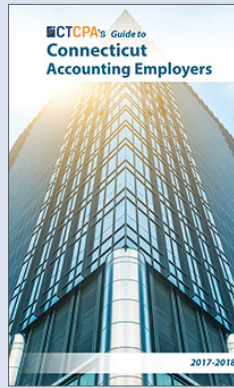
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1 Day >> 150 Job and Internship Interviews



**Recruit
interns and
employees with
CTCPA's Guide to
Connecticut
CPA Employers**

INTERVIEW DAY 2018

Friday, September 28

CTCPA Education Center, Rocky Hill • 8:00 a.m. - 5:00 p.m.

Our overwhelmingly successful event returns for the sixth year to help match top accounting majors at Connecticut colleges and universities with employers seeking interns or full-time hires.

>> **Learn more and register.**

www.ctcpas.org/interviewday

The Guide is provided to college and university accounting departments and career service offices around the state, appears on the CTCPA website, is distributed to CTCPA student members, and is displayed year-round in the CTCPA Education Center.

This collection of employer resume pages, higher education opportunities, and practical "how-to" information is designed to spotlight accounting career opportunities in Connecticut.

>> **Reserve your space.**

Contact Mark Zampino: markz@ctcpas.org • 860-258-0212



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State of the



*Where we've been ...
where we're headed.*



Welcome to Our Inaugural 'State of the CTCPA' Report



The theme for this year has been "Trust in Change," and we have kept at it all year! We started the year off with a new evening format for our Annual Meeting that was so successful we're repeating it this year. We'll be holding the event at a new centrally located venue – Cascade

in Hamden – and have secured AICPA President and CEO **Barry Melancon** to guide us through some of the disruptive technology that will be changing our profession in the very near term. See page 5 to learn how to reserve your place!

At this pivotal time for the profession, we have embarked on a **strategic planning process** to turn the challenges we face into opportunities. Starting with input from the Board of Directors and Advisory Council, the Strategic Planning Committee is composed of a diverse group of members representing multiple geographic regions of the state and working in a full spectrum of job positions and practices.

Major **national-level changes are coming to the peer review program**, so we've spent a lot of time and effort exploring various possibilities consistent with the AICPA's vision, ensuring our program will continue to provide the best possible service for members, clients, and the public.

In addition to adding **new programs and conferences** to our existing base of educational programming, we started **livestreaming as an option for several programs**; we plan to increase these offerings in the future. We're also working with the State Board of Accountancy to approve **nano-learning CPE credits** and other issues important to our members.

We've **expanded the number of member groups** both along regional lines and in various business sectors. These groups have been requested by you, our members. Please let us know if you have suggestions for additional groups or ways to enhance and expand our existing programs.

Thank you for your enthusiasm and support during my year as CTCPA president. I know more great things are to come as I hand off the reins to President-elect **Susan Martinelli**.

Sincerely,

Brad Kronstat, CPA
2017-2018 CTCPA President

Reflecting on our Successes with an Eye on the Future



It's been a productive year of change and growth for the CTCPA.

We've listened to you, our members, to identify ways we can best serve you in this time of unprecedented change. The future of the profession is being shaped by **technology innovations**, a rapidly evolving **regulatory and legislative landscape**, challenges in the **local and national economy**, a record number of **firm mergers and acquisitions**, growth in new practice areas such as **consulting and advisory services**, and much more.

With all of this change comes opportunities. We need to open our minds to new ways of thinking and doing. Today's business environment demands not only strong accounting and finance skills, but technological and innovative thinking to take things to the next level.

In the CTCPA offices, we're harnessing new technology to allow us to serve you better. We've used **artificial intelligence to streamline our processes**, in one case saving four hours of staff time per day that was once spent processing and distributing course eMaterials. We'll now be able to devote that time to **enhancing new member services and initiatives**.

When I think about the future of the CTCPA and its members, I'm not thinking about tomorrow or next year. I'm thinking about how we can help our members **not only survive but thrive for decades to come**. I'm committed to doing everything I can to **keep on top of emerging opportunities** so we can bring you the resources you need as you move forward.

I'm very proud of the work our members and staff have done in the past year. I hope you enjoy this *Connecticut CPA* retrospective as we reflect on all we've accomplished while at the same time getting out in front of what's coming next.

The future looks bright, and I'm excited for us to take the next steps together.

Bonnie Stewart
CTCPA Executive Director

Thank you to our volunteers!

We couldn't do the work we do without the time, talent, and expertise of our dedicated volunteers. Thank you to our committee and group members and chairs, Advisory Council and Board of Directors members, educational program speakers, event hosts, and everyone else who make it all possible.



Member Carl Johnson of CRJ Consulting and Board of Directors Member-at-Large Marie Benedetto of Marie Benedetto, CPA, Innovative Business Solutions lead Advisory Council and Board of Directors members through a SWOT analysis in November.

2017-2018 Board of Directors

Bradley D. Kronstat, President
Susan A. Martinelli, President-elect
Dennis W. Cole, Treasurer
Edwin R. Muenzner, Secretary
Marie L. Benedetto, Member-at-Large
Mitchell R. Insero, Member-at-Large
Michael P. Jordan, Member-at-Large, Advisory Council Chair

2017-2018 Advisory Council

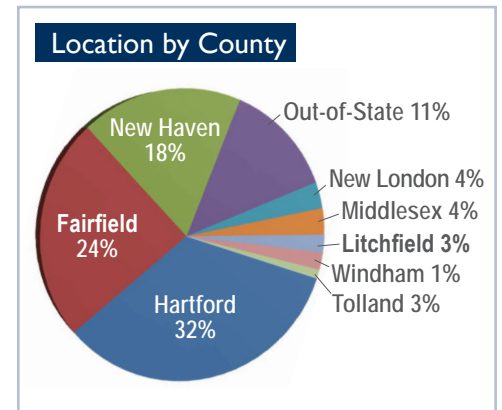
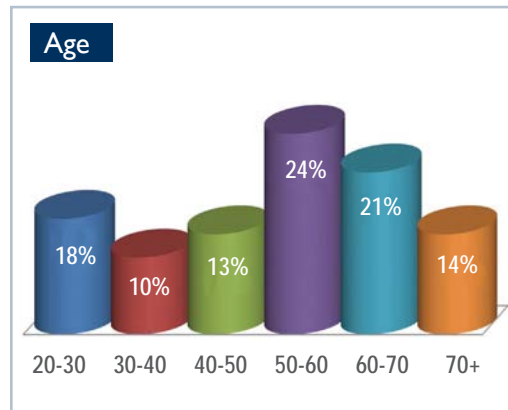
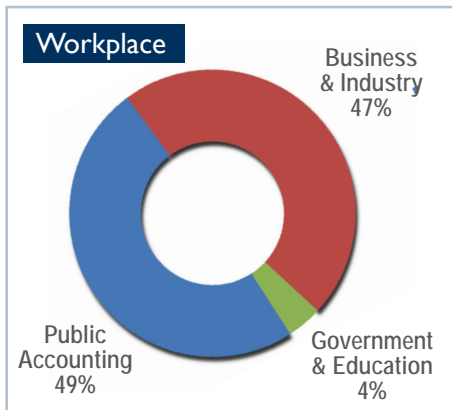
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Martin Henry Jr.	Lisa M. Wills
Paul N. Iannone	Mary K. Wisenski
Marie G. Kulesza	

See our 2018-2019 Board of Directors nominees and incoming Advisory Council appointees starting on page 27.



Member Statistics

Our members work in taxation, accounting and auditing, personal financial planning, corporate management, business ownership and entrepreneurship, education, government, and more across Connecticut and beyond.



New technology is fundamentally **changing the profession**. We're bringing you programs and resources to keep you on the leading edge.



Cybersecurity

Mitigating cybersecurity risks has become part of the CPA's job description. We're bringing you resources like our *Connecticut CPA* cover story on **cybersecurity risk reviews** specifically geared toward accounting professionals, our wildly successful new **Cybersecurity Conference for CPAs**, specialized sessions at events like our IRS Working Together conference on the use of **tax data in cyber attacks**, and a Fairfield County Chapter meeting on the latest **cyber attack tactics**. Look for many more programs like these in the coming year.



AI and Data Analytics

New technologies are allowing organizations to harness the power of automation to streamline manual processes, leverage data, and reduce operating costs. We provided resources including our Friday Focus for Members in Industry program on **embracing new technologies while managing costs and risks**. We're scheduling several new programs to help you learn about the potential for artificial intelligence (AI) and data analytics to help your clients and your business. AICPA Chair Barry Melancon kicks things off with his keynote address on **accounting in extraordinary times** at the CTCPA Annual Meeting (more on page 5).



Blockchain

Blockchain is a distributed ledger system that is being called the "future of recordkeeping." It is already being implemented around the globe at financial institutions and corporations and is expected to have a profound impact on the accounting profession in the very near future. We brought you a two-part *Connecticut CPA* series explaining the **basics of blockchain** and how it works with **cryptocurrencies like bitcoin**. We're lining up experts to speak on the topic for several upcoming member meetings and as part of our New and Young Professionals Breakfast Round-table series (more on page 9).

Visit our new technology hub at www.ctcpas.org/technology for resources and events.

Continuing Professional and Business Education

Our professional education is evolving to meet the needs of a changing world. We're harnessing the knowledge of local and national experts to bring you comprehensive learning in a delivery system that works best for you.

We started livestreaming to reach you where you are.



Members have asked for options to participate in meetings and educational sessions remotely.

We took a major first step in that direction when tax guru Walter Nunnallee visited Connecticut in January for his popular corporate and individual tax workshops. Hundreds of participants from Connecticut and around the country joined in via our livestream – complete with live video, integrated digital course materials and presentation slides, and a mechanism to ask questions in realtime.



There's more streaming and web conferencing to come!



We're determining the best technology to allow you to participate in committee meetings, seminars, and conferences from wherever you are.



We held **139** live seminars and conferences in the past year, and had **1,987** attendees at our events!



We offered **4,512** webinars on a wide variety of topics so your learning can take place wherever you are.

We added new programs to keep you in the know.

Cybersecurity Conference for CPAs



This sellout new conference was the brain child of members of the Technology Council. They assembled experts from the IRS, technology and insurance firms, and even a CPA firm that had gone through a breach and come out stronger on the other side. **“One of the best conferences I've been to. Very relevant and eye opening information,”** raved one participant.

Federal Tax Reform Seminars and Webinars



When the Tax Cuts and Jobs Act passed, we quickly brought you live and online education (including a specially added four-hour session with Walter Nunnallee!) to get the information you need.



We'll be developing more programs to connect members in business and public accounting.



One of our focuses in the coming year will be to continue to help members across various firms, businesses, and employment areas connect and share information.

We'll bring you more economic updates.



The health of the state and local economy is imperative to business growth and client retention and development. This year members heard from speakers like CBIA Economist Pete Gioia and Connecticut Commission on Fiscal Stability and Economic Growth Vice Chair Pat Widlitz. Look for more economic updates coming soon.

Education that comes to your office.

You provide the space, we'll send you the perfect instructor!

Help support the CTCPA while bringing convenient, cost-effective, high-quality live training right to your office. We can arrange for a wide variety of course options tailored to your staff's experience and knowledge levels. And to top it off, CTCPA receives a commission directly from the provider (at no additional cost to you) to help support our mission.

To learn more, contact **Lisa Bugryn** at lisab@ctcpas.org or 860-258-0232.

Member Groups and Meetings



We started several new specialized member groups.

We have heard some of the same feedback from many of our members: you like it when we come to you, and you're looking for more opportunities to learn from other members about things that affect you, your company, and your clients.

Thanks to the members who helped us plan, recruit other members, scout out facilities, and determine topics and speakers, several new groups got off to a strong start.



Regional Meetings



Executive Director **Bonnie Stewart** and Membership Director **Alicia Strong** hit the road this year for our new Regional Meetings, which each provided a brief Society, regulatory, and legislative update followed by an interactive discussion. Feedback we gathered helped shape many of this year's new programs and initiatives.

We held **15** Regional Meetings throughout the state in the past year. See page 6 for the next series coming this spring.



Fairfield County Chapter

This group will hold networking and educational meetings in Fairfield County on a regular basis, varying between breakfast, lunch, and evening timeframes. The group's kickoff meeting, held in Stamford, featured an update on the **latest cyber attack tactics** led by Thomas DeMayo (above) of PKF O'Connor Davies.

Chair: **Ronald F. DeSoiza** (PKF O'Connor Davies)



Southeastern Connecticut Chapter

These networking and educational meetings will be held in locations including Groton, Norwich, New London, and Waterford. Meetings have included a **state economic update** from Connecticut Business and Industry Association Economist Peter Gioia (above) in Waterford.



Business and Industry Roundtable

This group features roundtable discussion of regulatory, compliance, and management issues, such as a discussion of **business and the state's economy** with Connecticut Commission on Fiscal Stability and Economic Growth Vice Chair and former State Representative Pat Widlitz (above). Members in public accounting, law, etc. are also welcome to participate.

Chairs: **Steve LaRosa** (Alexion Pharmaceuticals)
Vice Chair: **Jen Whalley** (Amphenol Corporation)



CFO/Controller Roundtable

Our new CFO/Controller Roundtable is a group exclusively for CFOs and controllers to meet to discuss issues, share ideas, and hear from experts. The group's first meeting featured a discussion of **"lean" and its potential impact on streamlining processes within accounting and finance departments** led by Bonnie Del Conte and Matin Karbassioon (above) of CONNSTEP.

Chair: **Brad Hillman** (Global Steering Systems)



Members engaged in meaningful collaboration and education.

Even though we've added many new programs, our existing groups have continued their vital work together. Here are some highlights of the year's events and programs

Not-for-Profit Organizations Committee



This specialized committee took advantage of our close proximity to the **Financial Accounting Standards Board** in Norwalk and invited Assistant Director – Nonpublic Entities Jeff Mechanick to give an update at a recent meeting.

Valuation, Forensic, Litigation Support Group



This group held networking and educational dinner meetings including a panel discussion on **cybersecurity, breach readiness, and public/private sector partnerships** led by a Stamford-Norwalk state's attorney, U.S. Secret Service agents, and Weston police.

Technology Council



In addition to developing this year's new Cybersecurity Conference for CPAs, our technology gurus continued to answer member questions on everything from **cloud computing to tax software** at their monthly breakfast roundtable meetings.

Financial Institutions Council



These professionals working in the banking/credit granting industry (including CPAs in business and public accounting, regulators, and consultants) met for group-led discussion of **industry trends, regulatory/legislative developments, and new pronouncements.**

Friday Focus for Members in Industry



These free two-hour educational programs are specifically designed for members working in business and industry, such as our program on undergoing a **Connecticut sales and use tax audit** with Paul Greenfield of Connecticut Sales Tax Solutions.

Easton and Torrington CONNections



These free two-hour Fairfield and Litchfield County educational programs featured professional, regulatory, and economic topics such as an **international tax update** with attorney Paul Iannone and the **fundamentals of probate** with attorney John Massih.

State Taxation Committee



Members of this committee worked together to navigate the **regulatory, legislative, and judicial aspects** of Connecticut tax compliance and offered insight on **potential impacts of tax proposals and policies** to the DRS commissioner and staff.

Golf Committee



This year committee members raised **\$29,380 to support scholarships and grants for aspiring Connecticut CPAs** by securing sponsorships, raffle donations, and players for this high-quality tournament known for fun networking and friendly competition.

Employee Benefit Plans Committee



This committee of diversified professionals including auditors, actuaries, third-party administrators, and attorneys met for member-led roundtable discussion of issues affecting **benefit plans, program audits, and employers.**

Peer Review Committee



Committee members (serving by presidential appointment) worked extensively to determine the best way for CTCPA to move forward given the AICPA's **new requirements for the administration of the peer review program** and the launch of the **PRIMA online portal.**

Professional Ethics Committee



Committee members (serving by presidential appointment) met to **review ethics complaints** against members. Cases where the committee believed they found violations of the Code of Professional Ethics were referred to the AICPA Professional Ethics Division.

What's next

More group changes are coming.



We're continuing with an eye on the future and plan to start some new groups and rework some of our existing groups to bring you increased value and collaboration opportunities. Look for more coming for the following:

- Firm Administrators/Marketing Professionals Council
- Small Business Council
- Accounting and Reporting Standards Committee
- Educators Council



We enhanced our Capitol Corner coverage.



You told us you find our Capitol Corner legislative and regulatory updates very valuable so, based on your feedback, we've expanded to bring you news and updates about not only accounting matters, but human resources, regulatory reform, transportation, and more.

>> Capitol Corner is sent via email and available at www.ctcpas.org/capitolcorner.

We ramped up economic updates.

Economic growth is imperative to the success of our members' firms, companies, and clients. We brought you news and events about groups like the **Connecticut Commission on Fiscal Stability and Economic Growth**, and we will continue these updates in the future.

Advocacy and Relationships with Regulatory Agencies



Your CTCPA team at the State Capitol on Opening Day of the 2018 session: (from left) Kirsten Piechota, Caitlin Bailey O'Neill, Bonnie Stewart, and Mark Zampino.

We increased our visibility at the State Capitol.

We significantly increased our activity at the State Capitol this year. As our profile and positive reputation continue to grow, an increased number of legislators are calling upon us to offer feedback on new tax and economic proposals to ensure they are crafted in the most effective way to achieve their intended goals.

We've brought in members to testify and provide feedback on issues including:

- **Continuing professional education reciprocity** for CPAs holding licenses in multiple states.
- A proposal **restricting CPAs from representing clients in property tax appeals**, including **performing valuations** and **servicing as expert witnesses**.
- A proposal that **would have transferred certain taxpayer penalties to tax preparers/advisors**.
- **Tax preparer registration** for those not already regulated or an employee of a regulated tax preparer.
- The legislature's **definition of a "forensic audit."**
- Various **tax, audit, and economic growth** proposals.



Bonnie and Past President/AICPA Council Representative Alan Clavette speak with Senator Chris Murphy (left) as part of the AICPA's 2017 Capitol Hill visits.

We reinforced our relationships with federal legislators.

Executive Director **Bonnie Stewart**, Public Affairs Director **Mark Zampino**, and CTCPA representatives to AICPA Council **Bruce Blasnik**, **Alan Clavette**, and **Brad Kronstat** visited Capitol Hill as part of the AICPA's 2017 Spring Council meeting. The CTCPA contingency met with each congressional and senate office representing Connecticut.

Our relationships with these legislators continues beyond D.C. to the homefront, where we often call upon them to support issues important to the profession (such as the Mobile Workforce State Income Tax Simplification Act of 2017).

At the same time, these officials often reach out to the CTCPA for support and insight into the financial impact of federal legislation and proposals. Reps. **John Larson**, **Joe Courtney**, and **Elizabeth Esty** enlisted CTCPA members to help explain and get the word out to constituents about the changes brought on by the Tax Cuts and Jobs Act.

Strengthening our voice at the Capitol: Our political action committee returns.



Having a strong presence at the State Capitol can make a significant impact on our ability to advocate on behalf of the profession and our members. In light of that fact, the CTCPA Board of Directors voted to re-establish the CTCPA Political Action Committee. You can contribute to the PAC (via personal check or personal credit card only) online or through the check-off on your dues statement.



Bonnie and AICPA Vice President of State Regulatory and Legislative Affairs Skip Braziel speak on firm mobility and CPE reciprocity at the October State Board of Accountancy meeting.

State Board of Accountancy/ Department of Consumer Protection

The State Board of Accountancy's move to the auspices of the Connecticut Department of Consumer Protection (DCP) has been a positive one for Connecticut CPAs.

We have effectively addressed many issues to improve the regulatory and practice environment for Connecticut CPAs and those they serve with the cooperation and support of State Board members and DCP staff, including:

- Beginning the process of updating and adapting the state's CPA regulations to allow **nano-learning (CPE in smaller than one-hour increments)** and updating outdated language (such as changing references of quality review to peer review).
- Raising and receiving support from the State Board to introduce legislation to allow **CPAs holding licenses in multiple states to report their CPE only in their home state.**
- Working to **eliminate administrative errors** for licensees from reporting.
- Supporting **uniform accountancy legislation.**



It was a packed house (really – we had to rent extra tables!) for our State Tax 360° conference, featuring Connecticut tax heavy-hitters including DRS Commissioner Kevin Sullivan.

Department of Revenue Services/ Internal Revenue Service

We have a strong working relationship with the Connecticut Department of Revenue Services (DRS). Commissioner **Kevin Sullivan** and his staff frequently reach out to us to share breaking news with the membership, and we do the same when there are issues or developments that the DRS can help the tax preparer community address.

The DRS has formed a number of working groups with strong CTCPA member representation this year to ensure new laws and proposals have the intended results and are workable for taxpayers and practitioners who must implement new requirements.

DRS and IRS staff were integral speakers and attendees at our State Tax 360° and IRS Working Together conferences this year, where practitioners got information not available anywhere else. Speakers included IRS Senior Stakeholder Liaison **Joe McCarthy**, who is the personal contact and IRS representative for Connecticut CPAs.

We've made advocacy action easier.



We've made it even faster and easier for you to get involved and contact your legislators with our new Advocacy Action Center powered by VoterVoice.

This new technology, generously sponsored by the Connecticut offices of **Deloitte, EY, KPMG, and PwC**, makes it easy to make a connection with your legislators, even if you don't know them personally.

Make sure your voice is heard on issues vital to the profession and your business. Simply put your own personalization on the talking points we provide and our software will send your message directly to your legislators.

>> Action alerts are sent via email, or you can contact your legislators anytime at www.ctcpas.org/actioncenter.



This year's New and Young Professionals Leadership Conference was our highest-rated yet.
 >> Save the date for next year: November 15, 2018!

Outreach to Students and Young Professionals

We recruited more than 300 new student members in cooperation with the AICPA.

There have never been more students studying accounting, but many of those students are not sitting for or passing the CPA Exam. We have partnered with the AICPA pipeline project, a comprehensive, multifaceted program to promote a CPA culture at colleges and universities to ultimately increase the number of newly minted CPAs.

Initiatives include:

- Free joint membership in the CTCPA and the AICPA.
- Engaging promotional items including informational brochures, posters, and #FutureCPA t-shirts and bags.
- CTCPA on-campus visits to speak about majoring in accounting and the CPA career path.



We launched New and Young Professionals educational breakfast roundtables.

This year the New and Young Professionals Cabinet further expanded its programming with a series of breakfast roundtables featuring professional development speakers and networking in Hartford, New Haven, and Fairfield counties. See upcoming meetings on page 9.



New and Young Professionals meet up at Dworken, Hillman, LaMorte & Sterczala in Shelton.

We bolstered our Fairfield County New and Young Professionals Cabinet.

As part of our commitment to bring more programs to more parts of the state, we've added a Fairfield County New and Young Professionals Cabinet. These up-and-comers plan educational and social events for their peers in southwestern Connecticut.

Chair: **Michael Weymouth** (Marcum)

Our Student Ambassadors spread the word about CTCPA on campus.

Check out these reports from our eyes and ears on the ground!

We engage Student Ambassadors at Connecticut colleges and universities to act as CTCPA liaisons at their respective campuses. These students tell their peers about the benefits of CTCPA student membership and help coordinate and promote staff and member campus visits.

“The CTCPA has helped me learn how to be a leader. I have been able to use the accounting society as a platform to connect my peers with the resources and benefits the CTCPA has available.”

Stephen McGrath • Central Connecticut State University • Accounting Society President



“The CTCPA has helped me work on some of my soft skills such as public speaking. I have gained more confidence when addressing my peers thanks to the efforts and resources of the CTCPA.”

Alison Scalenghe • University of Connecticut • Accounting Society Vice President

“CTCPA Interview Day provided ECSU students with a chance to interact with companies, connect with other students, and learn about opportunities in accounting.”

Jimmy Yuen • Eastern Connecticut State University • Accounting Society President



“I was able to create some amazing connections through the CTCPA.”

Daniel Neal • University of Hartford • Accounting Society Member



“The CTCPA helped me expand my network, develop professionally, and find internships that helped me discover what I enjoy doing.”

Zachary Chilelli • Sacred Heart University • Accounting Society Treasurer



“The CTCPA helped me better understand the path to achieving my CPA license. I was also able to get a free professional headshot for LinkedIn, learn about the importance of networking, and get tips on how and when to start studying for the CPA Exam.”

Dominique Sepe • Fairfield University • Beta Alpha Psi President



“CTCPA Interview Day was a great opportunity for students to not only work on their interview skills but also have a chance to obtain a real internship or job.”

Brian Zheng • University of New Haven • Beta Alpha Psi President; Accounting Society Secretary



“I was fortunate to receive the CTCPA Educational Trust Fund’s Rising Sophomore Scholarship, which has helped me worry less about paying for school and focus more on learning. CTCPA events also give me an opportunity to meet great people within the profession.”

Jacob Custer • Post University • Accounting Society Treasurer



Community Service and Volunteerism

You've told us you'd like opportunities to give back as members of the CPA community. This year we coordinated two major charitable projects in addition to several longstanding ways to lend your support.

We organized volunteer and charitable opportunities.

Special Olympics Connecticut Volunteer Day

A group of members and their families spent a Saturday volunteering at Connecticut's Special Olympics Games at Southern Connecticut State University. When the 2,300 athletes weren't competing, they enjoyed fun activities in Olympic Town. Our volunteers staffed the arts and crafts tent, helping athletes complete take-home art projects.



Arts and Crafts Supply Drive for CCMC ArtReach

We came together this holiday season and collected hundreds of arts and crafts supplies to support Connecticut Children's Medical Center's ArtReach program. ArtReach helps patients and their families create arts and crafts projects so they can relax and focus on something other than illness.



More ways to give back to the profession

Community Accounting Services (CAS)



Community Accounting Services (CAS) provides **free professional accounting and financial counseling** to economically disadvantaged **businesses, individuals, and not-for-profit organizations** in Connecticut. You can provide financial support through the donation check-off on your CTCPA dues invoice, or volunteer your time and expertise as a CAS volunteer.

>> www.communityaccountingservices.org

Educational Trust Fund Scholarships



The Educational Trust Fund is administered by five CTCPA member trustees and supports tomorrow's CPAs today.

The fund presented **\$46,500 in scholarships to 25 aspiring CPAs** and **grants to 13 college and university student accounting groups** in the past year. You can support these efforts through individual and company donations, the dues renewal check-off, or by playing in or sponsoring the annual golf tournament.

>> www.ctcpas.org/etf

Educational Trust Fund Golf Tournament



Save the date!
Monday, September 24, 2018
The Farms Country Club, Wallingford

The CTCPA hosts an annual golf tournament with all proceeds going toward scholarships and grants for aspiring CPAs. You can lend your support by playing in the tournament with associates or colleagues or by sponsoring the tournament.

We raised **\$29,380** through **sponsorships, player fees and donations, and raffle ticket sales** at the 2017 tournament. The tournament has raised **\$437,719** since it began 22 years ago.

>> www.ctcpas.org/golf



President
Susan A. Martinelli, CPA
 Assurance Partner –
 RSM US, New Haven

CTCPA Involvement
 President-elect, Treasurer, Board of Directors member-at-large, Advisory Council member, Financial Institutions Council member



President-elect
Dennis W. Cole, CPA
 Partner –
 Beers, Hamerman, Cohen & Burger,
 New Haven and Fairfield

CTCPA Involvement
 Treasurer, Board of Directors member-at-large, Advisory Council member-at-large, Educational Trust Fund trustee and chair, Student Outreach and Career Awareness Committee member, Relations with Colleges and Universities Committee member and chair, Jack Brooks Leadership Award winner (2014)



Treasurer
Marie L. Benedetto, CPA
 Owner –
 Marie L. Benedetto, CPA, MST;
 Innovative Business Solutions,
 Middlefield

CTCPA Involvement
 Board of Directors member-at-large, Strategic Planning Committee co-facilitator, Advisory Council member-at-large, Golf Tournament Committee co-chair, Educational Trust Fund Review Taskforce member



Secretary
Mitchell R. Insero, CPA
 Financial Development Program –
 Cigna, Bloomfield

CTCPA Involvement
 Board of Directors member-at-large, Advisory Council member-at-large, Executive Search Committee member, New and Young Professionals Cabinet member and chair, Valuation, Forensic, and Litigation Support Group member, Jack Brooks Leadership Award winner (2016)



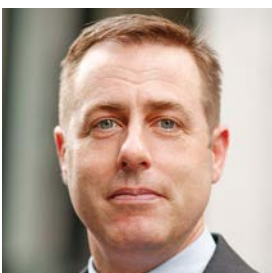
Member-at-Large
**Mark R. Torello, CPA, CFE,
 CISA, CRISC, CITP**
 Partner-in-Charge –
 Whittlesey Technology, Hartford

CTCPA Involvement
 Advisory Council member-at-large, Technology Council member and chair



Member-at-Large
Brian P. Reilly, CPA
 Senior Vice President and Chief Auditor –
 Travelers, Hartford

CTCPA Involvement
 Advisory Council member-at-large



**Member-at-Large/
 Advisory Council Chair**
Michael P. Jordan, CPA
 Managing Director –
 Andersen Tax, Old Greenwich

CTCPA Involvement
 2017-2018 Advisory Council chair and Board of Directors member-at-large, Nominating Committee member (2009 and 2016)

The CTCPA Board of Directors

The CTCPA is governed by a seven-member Board of Directors that serves as the organization’s senior decision-making and policy-making body.

A Nominating Committee of members determines the slate of candidates each year. Elections will take place at the Annual Meeting on May 16 (more on page 5).

Members-at-Large



Chair

Michael P. Jordan, CPA
 Managing Director –
 Andersen Tax,
 Old Greenwich



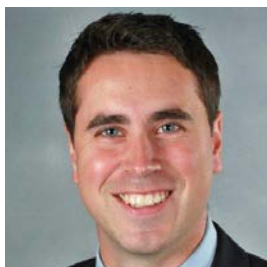
Matthew J. Auth, CPA
 Tax Senior Manager –
 Ernst & Young,
 Stamford



Michael J. Delaney, CPA, CFE
 Audit Manager –
 PKF O'Connor Davies,
 Wethersfield



Gerard J. Frame, CPA
 Partner –
 Novak Francella,
 Killingworth



Bradley Hillman, CPA
 Controller –
 Global Steering Systems,
 Watertown



Michael Maksymiw Jr., CPA, CGMA
 Principal –
 Filomeno & Company,
 West Hartford



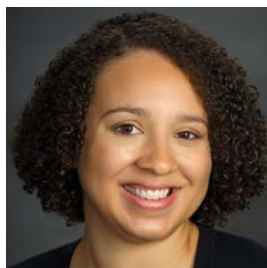
Mary C. Manfredi, CPA
 Manager of Finance –
 Electric Boat Corporation,
 Groton



Joseph W. Mooney, CPA, CGMA
 Deputy Commissioner –
 State of Connecticut Department of
 Revenue Services, Hartford



Amber L. Moore, CPA
 Manager –
 Goldblatt Bokoff LLC,
 Norwich



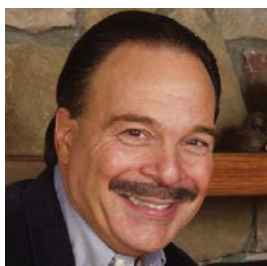
Katherine M. Patnaude, CPA
 Audit Senior Manager –
 PKF O'Connor Davies,
 Wethersfield



Lany Pfeifer, CPA
 Manager –
 Barron, Yanaros & Caruso,
 Wethersfield



Robert B. Stoddard, CPA
 Managing Director, Federal Tax –
 KPMG,
 Stamford



Joseph A. Tarasco
 CEO and Senior Consultant –
 Accountants Advisory Group,
 Cold Springs, NY



Troy Woolery, CPA
 Senior Associate –
 CohnReznick, Hartford

What is the Advisory Council?

During three half-day meetings each year, the Advisory Council serves as a sounding board and source of information for the Board of Directors, brainstorming on the future of the CTCPA and the profession.

The Nominating Committee appoints up to 30 members to the Advisory Council each year. At least half of those appointed are CTCPA group chairs (or their designees). The Advisory Council comprises members spanning diverse professional specializations and geographic areas across the state.

Committee/Group Representatives



Governmental
Accounting and Auditing
Jessica A. Aniskoff, CPA
Manager – BlumShapiro,
West Hartford



Golf Tournament
Michael W. Bolingbroke, CPA
Assistant Vice President –
Robert Half Management
Resources, Hartford



State Tax
Alan J. Clavette, CPA
Managing Member –
Clavette & Company,
Newtown



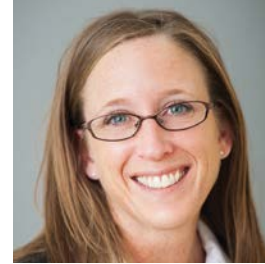
Trust, Estate, and Gift Tax
Paul T. Czepiga, CPA, JD
Principal –
Czepiga Daly Pope & Perri,
Berlin, Madison, Simsbury,
New Milford, South Windsor



New and Young Professionals
Katherine A. Donovan, CPA
Audit Supervisor –
Whittlesey, Hartford



Educational Trust Fund
Michael F. Ganino, CPA, CFE
Audit and Advisory Principal –
Dworken, Hillman,
LaMorte & Sterczala, Shelton



Employee Benefit Plans
Rebecca M. Guptill, CPA
Senior Manager Accountant –
Novak Francella,
Killingworth



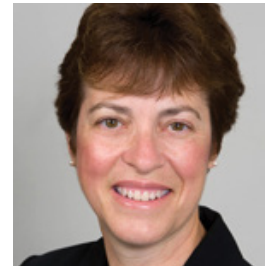
Valuation, Forensic, Litigation
Anastasiya V. Hajek, CPA, CFE
Senior Associate,
Assurance and Advisory Services –
Fiondella, Milone & LaSaracina,
Glastonbury



Peer Review
Martin Henry Jr., CPA
Partner –
Henry, Raymond & Thompson,
South Windsor



Federal Income Tax
Paul N. Iannone, JD, CPA
Tax Counsel – Rogin Nassau,
Hartford and Founder –
Tax Career Advisor, Cheshire



Educators
Marie G. Kulesza, CPA
Assistant Professor –
Central Connecticut State
University, New Britain



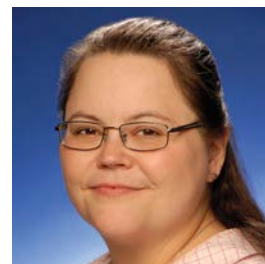
Technology
Francis B. Rooney III, CPA
Partner –
Germain and Rooney,
Trumbull



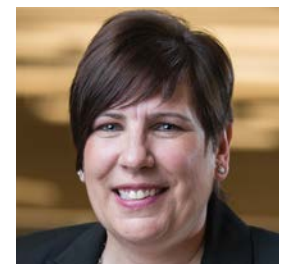
Professional Ethics
Ryan C. Sheppard, CPA, CFF
Partner –
Knight Roller Sheppard CPAs,
Fairfield



Financial Institutions
Mario L. Solari Jr., CPA
Audit and Accounting Partner –
Whittlesey, Hartford



Business and Industry
Jennifer Whalley, CPA
State Tax Manager –
Amphenol Corporation, Wallingford



Not-for-Profit Organizations
Lisa M. Wills, CPA
Audit Partner –
Whittlesey, Hartford

Joining the CTCPA, Paying Dues, and Using Membership Tools

Joining the CTCPA
 Paying membership dues or billing classes
 Member discounts and insurance savings
 Logging into and using the CTCPA website
 Listing yourself in the Find a CPA search engine
 Email subscriptions

Liz Frazza • lizf@ctcpas.org • 860-258-0220
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Liz Frazza • lizf@ctcpas.org • 860-258-0220
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Caitlin Bailey O'Neill • caitlinb@ctcpas.org • 860-258-0228
Caitlin Bailey O'Neill • caitlinb@ctcpas.org • 860-258-0228

Legislative and Regulatory Matters

State legislative matters
 Federal legislative matters
 CPA regulation/State Board of Accountancy
 Relationships with regulators

Bonnie Stewart • bonnies@ctcpas.org • 860-258-0214
Mark Zampino • markz@ctcpas.org • 860-258-0212
Bonnie Stewart • bonnies@ctcpas.org • 860-258-0214
Bonnie Stewart • bonnies@ctcpas.org • 860-258-0214

Becoming a CPA and Maintaining Your Certification

Becoming a CPA and the CPA Exam
 Scholarships and grants
 Ethics Exam purchases
 Professional ethics

Tyler Losure • tylerl@ctcpas.org • 860-258-0215
Alicia Strong • alicias@ctcpas.org • 860-258-0217
Doreen Fredette • doreenf@ctcpas.org • 860-258-0219
 Lynette Lindner • lynettel@ctcpas.org • 860-259-1062

Career Resources

Help wanted and mergers classifieds postings
 Per diem directory
 Posting or searching online resumes

Kirsten Piechota • kirstenp@ctcpas.org • 860-258-0231
Caitlin Bailey O'Neill • caitlinb@ctcpas.org • 860-258-0228
Caitlin Bailey O'Neill • caitlinb@ctcpas.org • 860-258-0228

Continuing Professional Education and Professional Development

Educational programs that come to your office
 CPE requirements and compliance
 Course/conference registrations
 Speakers bureau

Lisa Bugryn • lisab@ctcpas.org • 860-258-0232
Lisa Bugryn • lisab@ctcpas.org • 860-258-0232
Doreen Fredette • doreenf@ctcpas.org • 860-258-0219
Mark Zampino • markz@ctcpas.org • 860-258-0212

Technical Accounting Questions and Practice Management

Member-to-member technical consulting service
 Peer review
 Professional ethics

Liz Frazza • lizf@ctcpas.org • 860-258-0220
 Julie McNeal • juliem@ctcpas.org • 860-258-0236
 Lynette Lindner • lynettel@ctcpas.org • 860-259-1062

Engaging Your Network and Enhancing Your Personal Brand

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 Free professional headshots
 Writing for our publications
 Becoming a media source
 Using the "Member of CTCPA" logo

Alicia Strong • alicias@ctcpas.org • 860-258-0217
Cindy Panioto • cindyp@ctcpas.org • 860-258-0213
Alicia Strong • alicias@ctcpas.org • 860-258-0217
Tyler Losure • tylerl@ctcpas.org • 860-258-0215
Caitlin Bailey O'Neill • caitlinb@ctcpas.org • 860-258-0228
Lisa Bugryn • lisab@ctcpas.org • 860-258-0232
Kirsten Piechota • kirstenp@ctcpas.org • 860-258-0231
Kirsten Piechota • kirstenp@ctcpas.org • 860-258-0231
Mark Zampino • markz@ctcpas.org • 860-258-0212
Kirsten Piechota • kirstenp@ctcpas.org • 860-258-0231

Volunteering in Your Community

Charity drives and volunteer days
 High school and college student outreach
 Supporting the scholarship golf tournament

Alicia Strong • alicias@ctcpas.org • 860-258-0217
Tyler Losure • tylerl@ctcpas.org • 860-258-0215
Liz Frazza • lizf@ctcpas.org • 860-258-0220

Advertising, Sponsorships, and Meeting Space Rental

Sponsorship/advertising opportunities
 Partnership/business development opportunities
 Education Center meeting space rentals

Tyler Losure • tylerl@ctcpas.org • 860-258-0215
Cindy Panioto • cindyp@ctcpas.org • 860-258-0213
Doreen Fredette • doreenf@ctcpas.org • 860-258-0219

Please reach out to us for any of the topics listed here or more.

Not sure where to start? Contact us at:

860-258-4800
www.ctcpas.org

Other Helpful Contacts

Connecticut State Board of Accountancy
 (Housed under the Connecticut Department of Consumer Protection)

www.ct.gov/dcp
 860-713-6100

Licensing/certification email:
dcp.licensecpa@ct.gov

Enforcement issues email:
dcp.accounting@ct.gov

National Association of State Boards of Accountancy (NASBA)

www.nasba.org
 615-880-4200

CPA Examination Services
 800-CPA-EXAM (800-272-3926)

Connecticut Department of Revenue Services

www.ct.gov/drs
 860-297-5962

Connecticut IRS Senior Stakeholder Liaison

Joseph McCarthy
 860-756-4431
Joseph.S.McCarthy@irs.gov



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