

Spring 2025

Connecticut CPA

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State of the CTCPA

Championing Member Success at Every Career Stage

From students and aspiring CPAs just starting out to our most experienced members, this year's State of the CTCPA showcases the exclusive resources, robust network, and innovative programs we're providing to help you and your team thrive. *page 18*

Experienced
Professionals



Mid-Career
Professionals



New and Young
Professionals



Students and
Aspiring CPAs



A publication of the Connecticut Society of Certified Public Accountants

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Editor's Note

Why attend the 2025 CTCPA Annual Meeting? Join us for synergy, celebration, insight, and a scrambled egg bar!

We've heard your feedback and we're bringing a fresh new format for this year's Annual Meeting – join us to meet up with old friends and make new connections as we begin with a morning networking hour over coffee and small bites.

After that we'll move into our inspiring program where we'll celebrate what makes the profession and our organization great as we honor our volunteer leadership and award winners. We'll cap off the program with engaging discussion on local and national economic trends. It's the perfect opportunity to connect, collaborate, and kick-start the day.

We can't wait to see you there!



See you next issue,

Kirsten Piechota, Managing Editor

Official Notice of the 2025 CTCPA Annual Meeting

In accordance with the bylaws, notice is hereby given that the annual meeting of the Connecticut Society of Certified Public Accountants will be held on Wednesday, May 14 at 8:00 a.m. at the Sheraton Hartford South Hotel in Rocky Hill. The election and installation of the 2025-2026 Board of Directors will take place at that time.

The report of the Nominating Committee is as follows:

Mary Manfredi, CPA of General Dynamics Electric Boat,
Chair-elect for 2024-2025, will be installed as Chair;

Muhammad Malloy, CPA of CohnReznick LLP for Chair-elect;

Amber Moore, CPA, MSA of Goldblatt Bokoff LLC for Treasurer;

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

Eliot Bassin, CPA, CFE of Fiondella, Milone & LaSaracina LLP
for Advisory Council Chair;

Kariann McDougall, MSA, CPA of CBIZ, Inc. for Member-at-Large;

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

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

Rachel Tressy, CPA, CIA, CRMA of Voya Financial, Inc. for Member-at-Large.

Other nominations may be made in accordance with Section 6.4 of the CTCPA bylaws. The full leadership slate is available at www.ctcpas.org/Nominees and on page 12 of this issue.

Sincerely,

CTCPA Secretary Amber Moore, CPA of Goldblatt Bokoff LLC

2025 CTCPA Annual Meeting



Featuring Keynote Speaker

Jeffrey P. Thompson
Vice President and Economist –
Federal Reserve Bank of Boston
Research Department

Wednesday, May 14 • Sheraton Hartford South Hotel, Rocky Hill

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

Prices will increase by \$10 after May 1.

NEW This Year: Breakfast Networking Hour!

Networking Breakfast:

8:00 - 9:00 a.m.

Business Meeting and Keynote Speaker:

9:00 - 10:30 a.m.

We've switched things up this year in response to member requests: a breakfast meeting with a networking hour over coffee and small bites.

Following an engaging and interactive networking hour, we'll conduct our annual business meeting, taking a brief moment to thank outgoing CTCPA Chair **Kevin Lawlor** and welcome incoming Chair **Mary Manfredi** of General Dynamics Electric Boat, elect the 2025-2026 Board of Directors, install our new Advisory Council members, and honor winners of the Jack Brooks Leadership Award and our new CTCPA Impact Award.

Everyone's watching what's happening at the federal level right now, so we're excited to feature an economist from the Federal Reserve Bank of Boston as our keynote speaker. Vice President and Economist **Jeffrey P. Thompson** will offer valuable insights into the current economic landscape. CTCPA Executive Director **Bonnie Stewart** will also share the latest updates on our CPA mobility and pathways to licensure legislative efforts designed to help the profession's pipeline efforts.

Register at
www.ctcpas.org/AnnualMeeting.

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From the Executive Director and CEO



Your Voice Matters: How Small Actions Make a Big Difference in the Legislative Process

Bonnie Stewart, CTCPA Executive Director and CEO

Change is rarely driven by a single voice – it takes collective effort and a unified message. When it comes to CTCPA's regulatory and legislative efforts, your voice isn't just wanted – it's needed.

As much as I work to push for important proposals and changes, I'm far more effective when backed by our 6,000-member strong community. Your participation strengthens our impact and ensures that our concerns are heard when they matter most.

Advocacy That Works

We've seen time and time again how your voice can drive change, whether it's advocating for extended tax deadlines, adjusted audit thresholds, or streamlined regulations.

When legislators receive messages from a large portion of our membership base, they take notice and strong momentum begins. The best part? Becoming a key player in our advocacy efforts takes very little time to yield significant results.

Simple Ways to Get Involved

Your involvement doesn't need to be time-consuming or complicated – simply spending five minutes to send a message or making time for a short conversation with a legislator can have a profound effect. Here are a few easy ways to engage:

Participate in our VoterVoice grassroots action alerts each time you receive a request. We'll provide you with talking points and a prewritten message to customize, so all you'll need to do is add a bit about yourself and why the issue is important to you and hit "Send Message." You don't need to know your legislators or how to contact them – it's all taken care of by our system.

When your legislators hold a local coffee hour or town hall meeting, take the time to attend. Listen to what your legislators have to say and share your concerns.

Send a note to your legislators introducing yourself. To make it even easier, we can provide you with a template to get started.

If you already have a personal relationship with a legislator, please let us know. Sometimes a quick phone call to a key legislative committee member or leader can make all the difference in moving a proposal forward. In fact, one of our biggest legislative victories last year was secured thanks to a single member who made a phone call to a key legislator he knew personally.

Small, personalized touches make a lasting impression and help our community's voice stand out. That's why we encourage you to participate, even though much of the legislative session unfortunately fall during a very busy time for the profession.

Now Is the Time to Act to Reduce Connecticut CPA Licensing Fees

Our largest legislative challenge this year is our campaign to reduce CPA licensing fees, which is likely to be part of budget negotiations. While we were included in the General Law Committee bill, at press time we were not included in the governor's proposed fee reduction package. To ensure our concerns are addressed, we must actively push for our inclusion in the budget bill. This is an extremely important issue, and with your support, we can influence the final decision.

Now is the time to ask loudly and clearly for CPA licensing fees to be reduced. Consider taking the time to attend your legislators' town hall meetings or make phone calls to their offices to make sure they're aware of this issue.

You can find a link to talking points and a chart comparing Connecticut's astronomically high licensing fees to other states at www.ctcpas.org/Advocacy.

We Work for You – But We Need You, Too

We continue working on your behalf, but for us to be as effective as possible, we need you to stand with us. Your involvement strengthens our advocacy efforts so that together, we can make a lasting impact. Thank you for your support!



Advocacy Update

By Bonnie Stewart, CTCPA Executive Director and CEO

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

Licensing Fees, CPA Mobility, Pathways to Licensure Top CTCPA's 2025 Legislative Agenda

It has been an extremely packed legislative session for Connecticut CPAs as we pursue issues vital to the profession in this budget session, which runs through June 4.

While we have been active addressing proposals regarding artificial intelligence, credit card retention, taxation, and more, three main issues are at the forefront of our advocacy efforts. Please read more and take action to help – your participation is vital to our success.



Check www.ctcpas.org/Advocacy for the latest on these proposals and to contact your legislators using our simple VoterVoice system.

Connecticut CPAs Pay an Exorbitantly High Annual Licensing Fee: Help Us Fight for Fee Reductions

Our top legislative priority this year is our campaign to lower CPA licensing fees. For many, many years, Connecticut CPAs have paid the highest license fee in the U.S. It's not a marginal difference either – Connecticut CPAs pay \$565 annually, nearly five times the national average of around \$97 per year.

There is a severe shortage of licensed CPAs both in our state and nationwide, threatening the availability of licensed, proven professionals to perform vital financial services and protect the public interest. Connecticut's high license fee exacerbates these issues in our state.

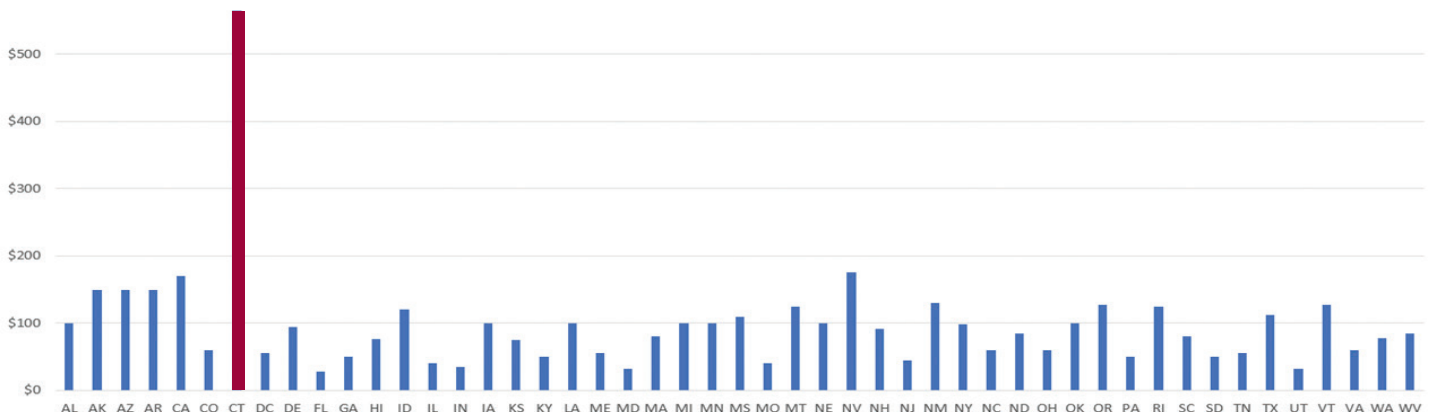
In addition, many Connecticut CPAs who retire choose to give up their licenses rather than maintain them due to the high cost of renewal, reducing the number of licensed CPAs

available to volunteer their services on nonprofit boards and commissions. Younger CPAs are also discouraged from obtaining and maintaining their licenses here, often opting to get licensed in other states if they do not perform attest work.

Thank you to the 400 members who sent 843 messages to Governor Lamont and legislators advocating for the CPA license fee to be reduced earlier in the session. To make sure our concerns are addressed, we need the other 4,600 of you to get involved and continue to actively advocate for our inclusion in the final budget!

Please call your elected officials' offices, attend their town hall meetings, and visit www.ctcpas.org/Advocacy to send messages. It is imperative that we ensure the voice of the profession is heard.

At \$565 annually, Connecticut's CPA license fee is nearly five times the national average.



CPA Mobility, Alternative Pathways to Licensure Proposals Part of Nationwide Movement to Fill Pipeline, Modernize Licensure

As part of our initiatives to fill the CPA pipeline and ensure our state's laws are aligned with the evolving needs of the profession, CTCPA is joining more than 30 states nationwide working to modernize CPA licensure and mobility laws. It is crucial that we work together as a profession to take swift and vocal action in supporting these proposals and advancing them through the legislative process.

We successfully secured the Connecticut State Board of Accountancy's support for our proposals and their request for legislative adoption this session. We are happy to report that our proposals advanced and, at press time, were included in *HB 7020, An Act Concerning Certified Public Accountants*.

CPA Licensure Pathways Proposal

Our proposal offers three flexible pathways to CPA licensure, expanding access to the profession while ensuring continued integrity of the credential by upholding the core principles of education, examination, and experience. Key benefits include:

- **Addressing Talent Shortages by Expanding Access:** Traditional requirements create financial and logistical barriers, limiting the supply of qualified professionals amid a growing talent shortage in the accounting industry.
- **Upholds Rigorous Standards:** Ensures all pathways uphold the core principles of education, examination, and experience, maintaining the profession's high standards. The CPA Exam remains the key guardrail that all must meet.
- **Aligns with National Trends:** To expand access to the CPA credential and attract a more diverse group of candidates, many states across the country are pursuing similar alternative pathways through legislative or regulatory action.

Automatic/Enhanced Mobility Proposal

We are pursuing adoption of automatic or enhanced mobility to grant CPAs who 1) are CPAs in good standing in another state and 2) who achieved their license via an accepted Connecticut CPA licensure pathway the privilege to practice here without administrative hurdles. The proposal:

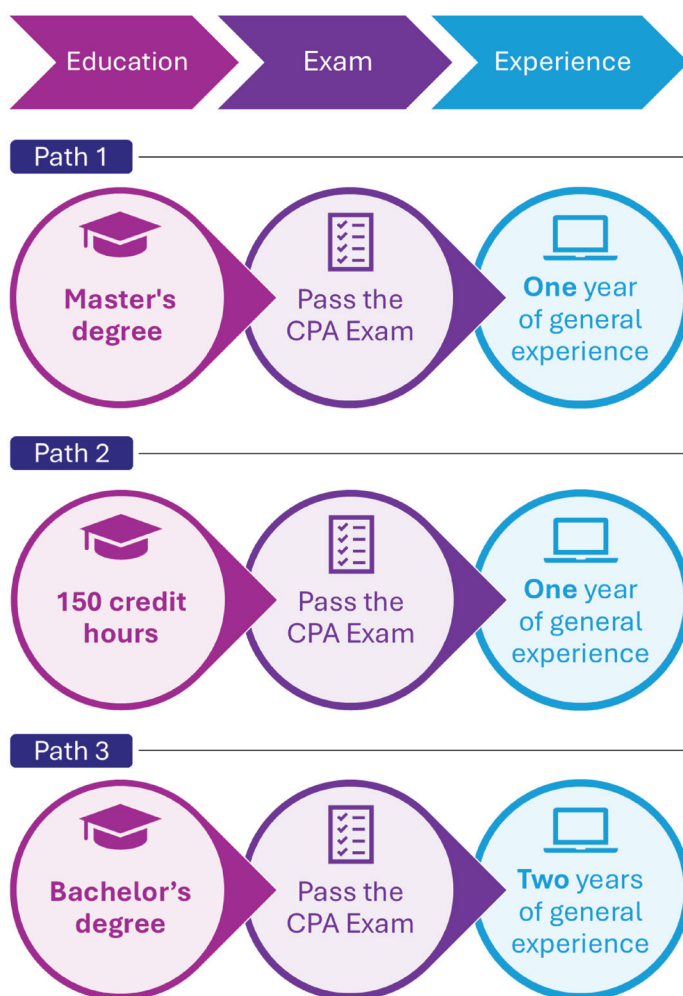
- **Minimizes Disruptions as Multiple States Broaden CPA Licensure Pathways:** As states across the country transition to alternative pathways to CPA licensure like those proposed in Connecticut, enhanced mobility helps minimize disruptions for CPAs and CPA candidates.
- **Works Toward State-to-State Consistency and Access:** With automatic mobility already implemented in six states and 30 more – including Connecticut – seeking it this year, CPAs can avoid the burden of obtaining licenses in each state where they practice. However, these changes require legislative or regulatory action in each state and will take

time. This approach promotes a seamless and stable professional environment, ensuring businesses and individuals can access essential accounting and auditing services, especially as many small businesses and government entities face challenges in finding the support they need.

- **Maintains Safeguards and Public Protection:** Automatic mobility preserves all existing protections, ensuring that CPAs practicing under this provision comply with Connecticut's laws and regulations. If an out-of-state license becomes invalid, CPAs must cease providing services and must perform certain services, like audits or reviews, through a Connecticut-licensed firm. Additionally, the State Board is authorized to cancel automatic mobility if a state fails to adequately protect consumers.

Visit www.ctcpas.org/Advocacy to access talking points and contact your legislators to support these proposals.

Proposed Pathways for Connecticut CPA Licensure





We need your help to make these proposals a reality!

Visit www.ctcpas.org/Advocacy and see how you can spend a few minutes to make a significant difference.

State Taxation Group's Proposals Address Audit Appeals, Bond Premium Amortization

The State Taxation Group brought a number of legislative proposals to the table this year, some for the first time and others as a second effort. The following two proposals were moving forward with public hearings at press time:

- **Audit Appeals:** Grant taxpayers the right to request that the Commissioner of the Department of Revenue Services issue a final decision within 15 days of receiving the request if an administrative tax protest remains unresolved after one year.

- **Bond Premium Amortization:** Do not disallow bond premium amortization on non-Connecticut municipal bonds; in the alternative, provide a basis adjustment. The current computation method is excessively complex and hinders ease of filing.

When we reach out asking for your support, please be sure to act and reach out to your legislators.

Learn more about these proposals and their legislative progress at www.ctcpas.org/state-tax-2025.



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www.ctcpas.org/golf

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CTCPA Women's Awards



Pictured are honorees (back row, from left) **Megan D'Alessandro**, CPA of Deloitte & Touche LLP, **Destiny Hartmann**, CPA of Fiondella, Milone & LaSarcina LLP, **Hannah Cleary** of Ernst & Young, **Kaitlyn Baron**, CPA of CBIZ, Inc., **Erin Jose** of Whittlesey PC, **Nicole Pelletier**, CPA of Whittlesey PC, (front row, seated, from left) **Melanie Ballestas**, CPA of CLA (CliftonLarsonAllen LLP), **LeeAnne W. Creevy** of Risk & Regulatory Consulting (an affiliate of RSM), **Mary Manfredi**, CPA of General Dynamics Electric Boat, and **Stacey A. Curran**, CPA of Whittlesey PC. Not pictured are **Kariann McDougall**, CPA of CBIZ, Inc. and **Lauren Shugrue**, CPA of The Innovative CPA Group, LLC.

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

The 2025 CTCPA Women's Awards celebrated female CPAs and accounting professionals making significant contributions to their organizations and the profession. Thank you to **Beth Costello** of The Hartford for joining us for an inspiring keynote interview with emcee **Renee DiNino** of WFSB Channel 3.

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



Keynote speaker Beth Costello of The Hartford shares advice on leading a team with emcee Renee DiNino of WFSB Channel 3.

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About the CTCPA Board of Directors

The Board of Directors 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 take place at the CTCPA Annual Meeting.



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Fiondella, Milone
& LaSaracina LLP



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About the CTCPA 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, demographics, and geographic areas across the state.

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A MOMENT AWAY



Health and Wealth Benefits Programs

Benefits Bridge specializes in health and wealth benefits programs designed to help employers, individuals and families reduce or eliminate many of the costs associated with maintaining their physical, mental, and financial well-being.



**Health Benefits
Membership
Program >>**



**Free Rx
Prescription
Savings Tool >>**



**Retirement
Solutions 401(k)
Program >>**

Learn more at www.benefits-bridge.com.

CTCPA Insurance Hub



Dental and Vision Insurance

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



Identity Theft Protection

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



Nationwide®

Pet Health Insurance

Nationwide provides affordable pet health coverage from preventive care to significant medical incidents. Visit <https://benefits.petinsurance.com/ctcpas> to explore plans and get a no-obligation quote with your member discount.



Professional Liability Insurance

Save money on the professional liability insurance you need. To learn more, call Ken Gross from PACE at 1-800-453-4021 and mention that you are a CTCPA member.

Learn. Connect. Thrive.

Member Meetings



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



CTCPA Town Hall Meetings

9:00-10:00 a.m. • Online

Join us for this opportunity to gather with CTCPA Executive Director and CEO **Bonnie Stewart** and special guests to discuss hot topics and issues affecting the profession.

Wednesday, June 18

Wednesday, July 16

Wednesday, August 20

Wednesday, September 17

Friday, October 17

Wednesday, November 19

Wednesday, December 17



New and Young Professionals Events

TopTracer Golf Outing

Thursday, May 22 • 5:30-7:30 p.m.

Chris Cote's Toptracer Range, Southington

Members: \$30 • Non-Members: \$40

Choose to play a round of virtual golf, practice your swing, or just be a spectator – we'll have a blast hanging out in our own private bay with fellow members and colleagues.

"Elixir" Event at Elicit Brewery

Thursday, Jul 17 • 5:30-7:30 p.m.

Elicit Brewing Company, Manchester

Members: \$35 • Non-Members: \$45

Enjoy an included drink and appetizers while connecting with other young professionals at one of our best-attended events of the year.

Cornhole and Corny Trivia Tournament

Thursday, Oct 23 • 6:00-8:00 p.m.

Nomads Adventure Quest, South Windsor

Individuals: \$25 • Team of two: \$40

Join us for the ultimate cornhole challenge – where the bags are flying, cocktails flowing, and winners "all knowing" ... because just when you think you've perfected your throws, we're tossing in some "corny" trivia to keep you on your toes!



First Annual Member Appreciation Day

Thursday, May 29 • 9:00am - 4:30pm • Online •

CPE: 7 hours

We're excited to introduce our first annual Member Appreciation Day! Join us for this virtual event designed to say thank you with seven hours of free CPE on today's most relevant topics. This day is all about learning, growing, and celebrating YOU – our valued member.



Governmental Accounting and Auditing Group Meeting

Discuss developments, regulations, and compliance issues.

Tuesday, April 22 • 9:00-10:00 a.m. • Online



State Tax Group Meeting

Navigate the details of Connecticut tax compliance while building relationships with fellow members and other leaders.

Wednesday, April 30 • 8:30am - 10:00am • Online



TechConneCT Roundtable

Connect with members of the CTCPA Technology Committee for a free exchange of ideas, best practices, and practical applications.

The Tax Talk: Reflect on the Good, Bad, and Ugly

Thursday, May 8 • 9:00am - 10:30am • Online



Educators Group Meeting

Discuss hot topics in this candid, conversational group.

Friday, May 30 • 11:00am - 12:00pm • Online



Virtual Premier Member Coffee Hour

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

Tuesday, June 3 • 9:00-10:00 a.m. • Online

CTCPA Groups and Committees

Special Interest Groups

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



Accounting, Auditing, Financial Reporting Group

Discuss exposure drafts and enhance relationships with standard-setters.

Contact: Cindy Panioto • cindyp@ctcpas.org



Cannabis Group

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

Contact: Lisa Bugryn • lisab@ctcpas.org



Chief Financial Officers Group (Exploratory)

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

Contact: April DiFalco • aprild@ctcpas.org



Educators Group

Discuss hot topics in this candid, conversational group.

Contact: April DiFalco • aprild@ctcpas.org



Employee Benefit Plans Group

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

Contact: Lisa Bugryn • lisab@ctcpas.org



Environmental, Social, & Governance (ESG) Group

Discuss and collaborate on sustainability reporting, disclosures, risk management, and more.

Contact: Cindy Panioto • cindyp@ctcpas.org



Federal Taxation Group

Discuss issues and build relationships with legislators and regulators.

Contact: Cindy Panioto • cindyp@ctcpas.org



Financial Institutions Group

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

Contact: April DiFalco • aprild@ctcpas.org



Firm/Company Administrators Group

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

Contact: Cindy Panioto • cindyp@ctcpas.org



Golf Group

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

Contact: April DiFalco • aprild@ctcpas.org



Governmental Accounting & Auditing Group

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

Contact: Lisa Bugryn • lisab@ctcpas.org



Internal Audit Group (Exploratory)

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

Contact: Cindy Panioto • cindyp@ctcpas.org



Not-for-Profit Organizations Group

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

Contact: Lisa Bugryn • lisab@ctcpas.org



State Taxation Group

Navigate the regulatory and legislative aspects of Connecticut tax compliance.

Contact: April DiFalco • aprild@ctcpas.org



TechConneCT Roundtable

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

Contact: Cindy Panioto • cindyp@ctcpas.org



Trust, Estate, and Gift Taxation Group

Discuss taxation, trusts, gifting strategies, and more.

Contact: Cindy Panioto • cindyp@ctcpas.org

Leadership Committees

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



Membership Committee

Help the CTCPA with recruitment as well as evaluating member benefits.

Contact: Cindy Panioto • cindyp@ctcpas.org



New & Young Professionals Cabinet

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

Contact: April DiFalco • aprild@ctcpas.org



Peer Review Committee

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

Contact: Lynette Lindner • lynettel@ctcpas.org



Investment Committee

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

Contacts: Bonnie Stewart, Giselle Millado • gisellem@ctcpas.org

Governance Committees

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



Bylaws Committee

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

Contact: Bonnie Stewart • bonnies@ctcpas.org



Nominating Committee

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

Contact: Bonnie Stewart • bonnies@ctcpas.org



Professional Ethics Committee

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

Contact: Lynette Lindner • lynettel@ctcpas.org



Audit-Review Committee

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

Contact: Bonnie Stewart • bonnies@ctcpas.org

**Experienced
Professionals**



**Mid-Career
Professionals**



**New and Young
Professionals**



**Students and
Aspiring CPAs**



State of the CTCPA

Championing Member Success at Every Career Stage

From students and aspiring CPAs just starting out to our most experienced members, this year's State of the CTCPA showcases the exclusive resources, robust network, and innovative programs we're providing to help you and your team thrive at every career stage.



Exclusive Resources

Jump ahead of the curve with dynamic information and diverse learning opportunities.



A Robust Network

Fuel meaningful connections and collaborations to enhance personal and professional growth.



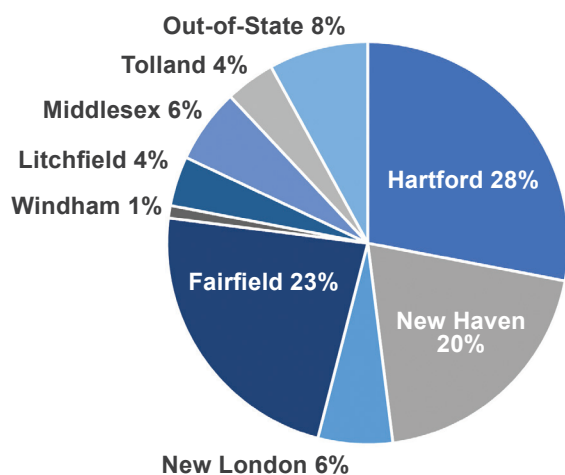
Innovative Programs

Seize emerging opportunities and elevate success in a rapidly evolving world.

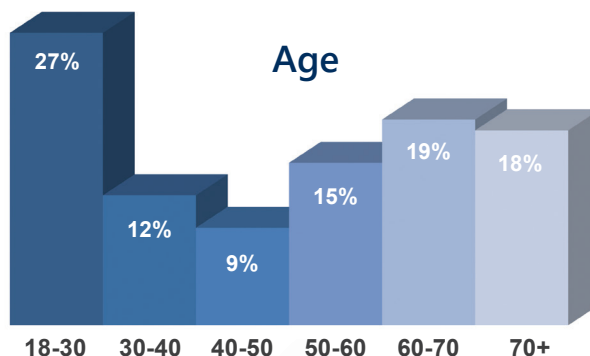
Who are CTCPA members?

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

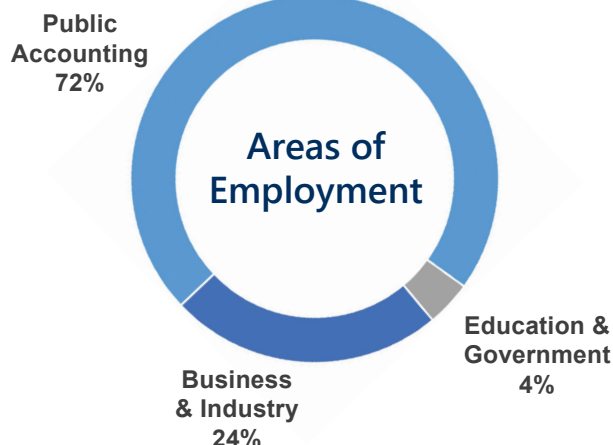
Location by County



Age



Public Accounting



What Members Have to Say

We conducted a member survey earlier this year to identify our top benefits and top issues to address in the future.

Top Member Benefits

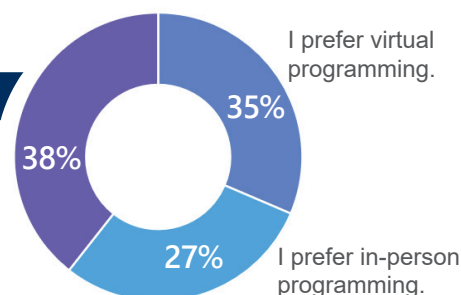
- Advocacy efforts**
State Board of Accountancy, legislative, regulatory
- Communications**
Connecticut CPA magazine, Member eNews, Advocacy Updates, special alerts
- Discounts on high-quality professional development**
Webinars, in-person, self-study, etc.
- Committees and interest groups**
State Tax, Federal Tax, Technology, Not-for-Profit Organizations, etc.
- Networking opportunities and member meetings**
Special events, Town Halls, roundtables

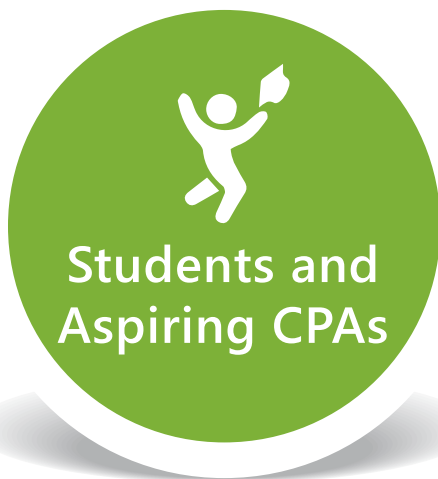
Top Concerns

- Staffing/recruitment/retention**
- Compliance with changing regulations**
- Work/life balance**
- High cost of doing business**
- Keeping up with technology/AI**

How to Meet

I like to learn online, but appreciate getting together in person for fun/social events.





(left photo) Ryan Sheppard of Roller & Sheppard CPAs speaks at Wilton High School, and (right photo) high schoolers learn about majoring in accounting at UConn.

As pipeline issues remain a pressing concern for the profession, we're working to attract candidates to CPA careers and support them on the path.

A strong and diverse pipeline is imperative to future success and growth. Our Pipeline Task Force and Accounting Scholarship Foundation are working to engage tomorrow's accounting professionals.

Inspiring the next generation.

Did someone steer you toward the finance/accounting path when you were in high school? It's your turn to guide a student. We have many opportunities to get involved, and reaching as many students as possible is our goal.

✓ High School Speakers Bureau

Present our customizable slide deck in a high school classroom.

✓ Career Fairs

Set up a table with your branded marketing materials and share information with students.

✓ College Visit Presentation

Share our presentation on the CPA Exam and becoming a CPA to an accounting society or Beta Alpha Psi chapter.



Pursuing alternative pathways to CPA licensure.

This legislative session we are working with the State Board of Accountancy to pursue multiple new pathways to CPA licensure designed to broaden access to the CPA credential by recognizing diverse educational and experience backgrounds without compromising the rigorous standards of the profession.



Awarding accounting grants and scholarships.

The CTCPA Accounting Scholarship Foundation (ASF) provides scholarships to Connecticut high school and college students, encouraging a strong pipeline for years to come. This year, trustees awarded more than \$50,000 to help aspiring CPAs.



The road starts with an accounting major.

Our Pipeline Task Force has identified encouraging students to major in accounting as a critical first step to filling the pipeline. We actively engage with Connecticut high schools and are working to identify even earlier opportunities such as middle and elementary school years.



(left photo) New and Young Professional Gerald Davis of HarperWhitfield serves as a media spokesperson at the CTCPA Day of Giving food drive, and (right photo) new Connecticut CPAs are celebrated at our annual Recognition Reception.

Blaze the path to leadership and forge a professional network in an engaging, supportive environment.



Cultivate connections to grow your book of business or client base.

From referral sources to potential clients, CTCPA programs and groups engage professionals in industry, law, government, not-for-profits, and more.



Jump into groups to learn and lead.

Amplify your leadership skills by serving on a committee. As you learn and grow, you can step up to serve as a group chair or maybe even as a member of our Advisory Council or Board of Directors!



Unlock your potential with volunteer work.

Get matched with a not-for-profit seeking a financial expert to serve on its board of directors, inspire the next generation as a speaker in college and high school classrooms, or help organize a charity drive.



Making a mark at programs and special events.

Our New and Young Professionals and other specialized programs offer leadership opportunities at community service drives, diversity events, networking and educational programs, and fun competition like our dodgeball tournament and virtual golf outing.

Make the most of your membership:

- ✓ Find your perfect professional development fit with our curated course collections organized by staff level and career focus.
- ✓ Dive in and learn with fellow accountants, architects, attorneys, finance, and insurance professionals in the Connecticut Professionals' Leadership Academy.
- ✓ Navigate tax code, share CPA Exam survival tips, and get answers to tough questions in our online community.
- ✓ Get one-on-one guidance to navigate any bumps in the road during the CPA certification process.
- ✓ Tap into generous discounts on a variety of CPA Exam review courses.



Attendees at this year's Fairfield and Hartford county Attorneys, Bankers, and CPAs (ABC) events enjoy catching up and forging new connections.

Amplify your resources, broaden your reach, and accelerate your organization's growth.

Make the most of your membership:

- ✓ Learn from experts on cutting-edge tools and ready-to-implement technology.
- ✓ Set yourself apart and gain visibility as a leader on a specialized committee or leadership group.
- ✓ Engage in networking and business development in multi-industry programs.
- ✓ Join vibrant, topic-specific online communities to get answers to tough questions and swap knowledge.
- ✓ Empower emerging leaders on your team to build their skills by joining you at committee meetings or events.



Take advantage of top-rated news and publications.

From regulatory changes and technology to business strategy and management, keep on top of emerging issues and breaking news.



Get insider information and spark change at the State Capitol and beyond.

Ensure your voice is heard on critical regulatory and legislative issues and engage directly with officials on matters vital to you.



Find top-notch training for you and your team.

With a diverse array of educational programs, certifications, and conferences, get ahead in a rapidly evolving world.



Cultivating relationships and collaborations.

From special events to dinners with the Department of Revenue Services to Attorneys, Bankers, and CPAs (ABC) networking events and more, foster the connections you need.



Experienced Professionals



Members make connections and share knowledge at Celebrating Diversity in the Workplace and Management of an Accounting Practice events.

Navigate rapid change, share knowledge, and help shape the future of your organization and the profession.



Sparkling connections to grow and give back

Engage with a community of attorneys, bankers, financial planners, legislators and regulators, insurance and not-for-profit professionals, and more – and bring your staff to help them learn the ropes of networking and business development.

Make the most of your membership:

- ✓ Forge connections with fellow leaders in public accounting and business and industry at specialized meetings.
- ✓ Be the first to know about critical issues with exclusive news updates, Town Hall Meetings, roundtables, and more.
- ✓ Boost visibility by listing your firm in our Find a CPA online search engine.
- ✓ Tackle pipeline challenges through extensive opportunities to empower emerging leaders to grow and excel.
- ✓ Save with the member rate on your firm's peer review.



Tap into leading-edge resources to fuel growth.

Dive into the latest trends in technology, strategic planning, regulation and compliance, expansion of services, and much more to keep you ahead in a rapidly changing business environment.



Share your expertise.

Exchange knowledge and advice as a member of a specialized committee or in our private online community, serve as a member of the Advisory Council or Board of Directors, or serve as a speaker, author, or media source.



Optimize and save on professional development with leveled tracks and an in-house concierge service.

Unlock exclusive member savings on recommended tracks by experience level and bulk credit passes, or use our free concierge service to bring the perfect instructor right to your office.

Thank you to our volunteer leadership!

2024-2025 Board of Directors

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Kevin Lawlor, CPA

*Formerly of Fairfield University
and Seton Collaborative*

Chair-elect

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General Dynamics Electric Boat

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Technology

MMNT, LLC

Javim Gordon

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Nicole Pelletier, CPA

Member-at-Large

Whittlesey PC

Shanita Booker, MST

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The Hartford

Destiny Hartmann, CPA, MSA

New and Young Professionals

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Teri Pough, SHRM-CP

Firm/Company Administrators

Baker Tilly US, LLP

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Member-at-Large

Powerful Accounting, Inc

James Hogan, CPA

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University of Saint Joseph

Michael Welch,

CPA/ABV/PFS, J.D., LL.M

Federal Income Tax

*Pue, Chick, Leibowitz &
Blezard, LLC*

Megan Budd, CPA

Cannabis

Baker Tilly US, LLP

Kevin Kiss, CPA

Financial Institutions

RSM US LLP

Michael Ziebka, CPA

**Accounting, Auditing,
and Financial Reporting**
Budwitz & Meyerjack, P.C.

Alan Clavette, CPA, CGMA

State Taxation

Clavette & Company, LLC

**J. Allen Kosowsky,
CPA, ABV, CVA, CFE, CFF**

Member-at-Large

Baker Tilly US, LLP

Anne Comer, CPA

Member-at-Large

CRC Group

Angelo Lombardo, CPA, MSA

Member-at-Large

Yale University

Thank You, 2024-2025 CTCPA Premier Members!

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

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Square10 Solutions LLC

Raymond W. Anderson

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Annunziata, Madonna & Co LLC

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MS Gostomski, CPA

Paul R. Greenberg
Ritch, Greenberg & Hassan, P.C.

Sandra G. Harrison
Sandra G. Harrison, CPA, LLC

Michael W. Hassan
Ritch, Greenberg & Hassan, P.C.

Timothy P. Hedley, Ph.D.
Fordham University

Hope M. Igdalsky
Igdalsky & Co., CPAs

John A. Kanabis
Kanabis Accounting Services LLC

Christopher King
King, King & Associates

Robert E. King
King, King & Associates

Bradley D. Kronstat

Timothy J. Lamb
Timothy J. Lamb, CPA

Kevin P. Lawlor

Richard A. Lawrence
Lawrence Associates LLC

Edward Lemkin
Edward Lemkin, CPA

Justin M. Liskiewicz
Justin M. Liskiewicz CPA, LLC

Janet S. Maley

Eric Minotti
EY – Retired

Thomas S. Monterosso
Thomas S. Monterosso, P.C.

Sheila S. Moses
Moses Tax Group, P.C.

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Budwitz & Meyerjack, P.C.

Edwin R. Muenzner
Edwin R. Muenzner, CPA

David C. Mulhall
LPL Financial Services

Jeff M. Musante
Musante & Musante, CPAs

Stephen A. Musante
Musante & Musante, CPAs

Sean O'Grady
King, King & Associates

Cassandra Palencia
BDO USA

Michael G. Pallein
Michael G. Pallein, CPA

Katherine M. Patnaude
PKF O'Connor Davies

William R. Peck
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Evans Insurance Agency,
Evans Pires & Leonard

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Bowman, Black & DeFilio, LLC

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Saas Kirwan Associates

Francis X. Tirelli
Finaxstrure Associates LLC

Michael A. Totilo
Totilo & Co. CPAs

Ralph A. Volpe III
RSM – Retired Partner

Katherine L. White
Moses Tax Group, P.C.

John F. Worgan
Ritch, Greenberg & Hassan, P.C.

Mark M. Wynnck
Weinshel, Wynnck & Associates,
LLC

Michael A. Ziebka
Budwitz & Meyerjack, P.C.

Professional Development

| Date | Title | Course Code | Member Early/Standard | Nonmember Early/Standard | CPE Hours |
|---------|--|-------------|-----------------------|--------------------------|-----------|
| 5/7 | K2's Excel Tips, Tricks, and Techniques for Accountants | EXL-A | \$279/\$314 | \$404/\$439 | 8 |
| 5/8 | K2's Advanced Excel | ADE-A | \$279/\$314 | \$404/\$439 | 8 |
| 5/12-15 | AHI: Level II – Semi-Senior Staff Training | SSST-24A | \$835/\$835 | \$960/\$960 | 24 |
| 5/15 | K2's Accountant's Guide to QuickBooks Online | QBO-A | \$279/\$314 | \$404/\$439 | 8 |
| 5/16 | K2's Case Studies in Fraud and Technology Controls | CFT | \$279/\$314 | \$404/\$439 | 8 |
| 5/19-22 | AHI: Level III – Beginning In-Charge Staff Training | BIC3-24A | \$835/\$835 | \$960/\$960 | 24 |
| 5/20 | CTCPA's Employee Benefit Plans Conference | EBPWEB | \$279/\$314 | \$404/\$439 | 8 |
| 5/20 | Going Out on Your Own: Entity Types and Accounting Methods | TAM2 | \$79/\$89 | \$114/\$124 | 2 |
| 5/20 | Top Ten Questions from Partnership Clients Regarding the Section 754 Election | T754 | \$140/\$160 | \$205/\$225 | 4 |
| 5/21 | 2025 Preparation, Compilation, and Review | KHPCR-A | \$279/\$314 | \$404/\$439 | 8 |
| 5/21 | Complying with the Corporate Transparency Act: A Guide for Client Protection | CTAP | \$79/\$89 | \$114/\$124 | 2 |
| 5/21 | Understanding Partnership Taxation: Types of Basis, Contributions, and Distributions | PTB4 | \$140/\$160 | \$205/\$225 | 4 |
| 5/21 | Understanding S Corporation Taxation: Shareholder Basis, AAA, and Retained Earnings | SCB2 | \$79/\$89 | \$114/\$124 | 2 |
| 5/22 | Annual Accounting and Auditing Update | ACAU | \$279/\$314 | \$404/\$439 | 8 |
| 5/27 | Estate and Financial Planning for Generations X and Y | EPXY | \$279/\$314 | \$404/\$439 | 8 |
| 5/28 | Auditing Complex Management Estimates | CME4 | \$140/\$160 | \$205/\$225 | 4 |
| 5/28 | Performing Effective and Efficient Audit Sampling and Analytical Procedures | EEA4 | \$140/\$160 | \$205/\$225 | 4 |
| 5/30 | Construction Contractors: Critical Accounting, Auditing, and Tax Issues | CONS-A | \$279/\$314 | \$404/\$439 | 8 |
| 6/2 | 2025 Accounting and Auditing Update | KHAAU | \$279/\$314 | \$404/\$439 | 8 |
| 6/2 | AI-Driven Ethics and Data Analytics: A Roadmap for Accountants | AIE4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/2 | Limited Liability Companies: Losses, Liquidations, Terminations, Continuations, and Sales | ACL4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/2 | Surgent's Federal Tax Update | BFT4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/2 | Unlocking AI: Fundamentals and Generative AI for Accountants | UAI4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/2-5 | AHI: Level IV – Management and Leadership Essentials Training | MLE-24A | \$835/\$835 | \$960/\$960 | 24 |
| 6/3 | Optimizing IT Systems, Internal Controls, and Governance for Accountants | OIS4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/3 | Securing Information Systems and SOC Compliance in the Digital Era | SIS4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/3 | Surgent's Individual and Financial-Planning Tax Camp | IFCP | \$279/\$314 | \$404/\$439 | 8 |
| 6/4 | CTCPA's Governmental Accounting and Auditing Conference | GAAWEB | \$279/\$314 | \$404/\$439 | 8 |
| 6/5 | Annual Update and Practice Issues for Preparation, Compilation, and Review Engagements | CORU | \$279/\$314 | \$404/\$439 | 8 |
| 6/5 | How to Settle a Client's Estate | SEAZ | \$279/\$314 | \$404/\$439 | 8 |
| 6/6 | Postmortem Estate Planning: Navigating Decedent's Estate Issues | PMEP | \$279/\$314 | \$404/\$439 | 8 |
| 6/6 | Preparing Not-for-Profit Financial Statements | ENFP | \$279/\$314 | \$404/\$439 | 8 |
| 6/6 | Social Security and Medicare: Planning for You and Your Clients | SSRB | \$279/\$314 | \$404/\$439 | 8 |
| 6/9 | A Practical Guide to Trusts: Maximizing Financial, Estate, and Asset Protection Strategies | PGTT | \$279/\$314 | \$404/\$439 | 8 |
| 6/9 | Evaluating Fraud Risk in a Financial Statement Audit | ARF4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/9 | Surgent's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships | HMBI | \$279/\$314 | \$404/\$439 | 8 |
| 6/9 | The Most Critical Challenges in Not-for-Profit Accounting Today | CNA4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/10 | Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses | GSM4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/10 | Forensic Accounting: Fraud Investigations | FAFI | \$279/\$314 | \$404/\$439 | 8 |
| 6/10 | Introduction to Forensic Accounting | ITFA4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/10 | IRS Tax Examinations and Hot Issues | EXI4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/10 | Tax Research | TXR2 | \$79/\$89 | \$114/\$124 | 2 |
| 6/11 | Auditing the Complex: Revenue and Leases | ARL4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/11 | Evaluating Evidence and Workpapers: Is It Enough? | EEW4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/11 | Integrated Estate, Financial, and Asset Protection Planning: A Breakthrough Approach | IEFP | \$279/\$314 | \$404/\$439 | 8 |
| 6/11 | Real-World Fraud Found in Governments and Not-for-Profits | RFGN | \$279/\$314 | \$404/\$439 | 8 |
| 6/12 | Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations | CCACT4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/12 | Tax Basis and Other Special Purpose Framework | KHTBSPF4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/13 | Best Practices in Not-for-Profit Accounting and Reporting | BPN4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/13 | Improving Your Profits: Identifying Cost Cutting Opportunities | IYP2 | \$79/\$89 | \$114/\$124 | 2 |
| 6/16 | Estate Planning for 2025 and Beyond | EPXX | \$279/\$314 | \$404/\$439 | 8 |
| 6/16 | Simply Auditing Not-for-Profits Efficiently | SAN4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/17 | CTCPA's Accounting, Auditing, and Financial Reporting Conference | AACWEB | \$279/\$314 | \$404/\$439 | 8 |
| 6/17 | K2's Business Intelligence, Featuring Microsoft's Power BI Tools | BIF | \$279/\$314 | \$404/\$439 | 8 |
| 6/17 | Buying and Selling a Business: Critical Tax and Structuring Issues | SELL | \$279/\$314 | \$404/\$439 | 8 |

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| Date | Title | Course Code | Member Early/Standard | Nonmember Early/Standard | CPE Hours |
|---------|--|-------------|-----------------------|--------------------------|-----------|
| 6/18 | K2's Excel PivotTables for Accountants | EPT | \$279/\$314 | \$404/\$439 | 8 |
| 6/18 | Professional Ethics for Connecticut CPAs | ETHCT | \$160/\$180 | \$225/\$245 | 4 |
| 6/19 | 2024 Governmental and Not-for-Profit Annual Update | GNAU | \$279/\$314 | \$404/\$439 | 8 |
| 6/19 | K2's Excel Best Practices | K2EBP-A | \$279/\$314 | \$404/\$439 | 8 |
| 6/20 | Surgent's Essential Depreciation and Expensing Update | TDP4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/23 | Compilations, Reviews, and Preparations: Engagement Performance and Annual Update | CRAU | \$279/\$314 | \$404/\$439 | 8 |
| 6/23 | K2's Next Generation Excel Reporting | NGE-A | \$279/\$314 | \$404/\$439 | 8 |
| 6/23 | Maximizing Your Social Security Benefits | SSR4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/24 | Accounting, Audit, and Attest Update for Practitioners with Small-Business Clients | SMBP | \$279/\$314 | \$404/\$439 | 8 |
| 6/24 | Four Tiers of Loss Limitations: A Guide to the Rules for Pass-Through Entities | FTL4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/24 | K2's Better Productivity Through Artificial Intelligence And Automation Tools | AIA-4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/24 | K2's Ethics And Technology | ETT-4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/24 | Multistate Income Tax Issues | MIT4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/24 | Preparation, Compilation, and Review Engagements: Update and Review | CL4COMP | \$140/\$160 | \$205/\$225 | 4 |
| 6/25 | AHI: The Mindful-CPA | MCPA2-A | \$99/\$99 | \$134/\$134 | 2 |
| 6/25 | Financial Statement Disclosures | KHFSD | \$279/\$314 | \$404/\$439 | 8 |
| 6/25 | K2's QuickBooks For Accountants | QBP | \$279/\$314 | \$404/\$439 | 8 |
| 6/26 | Annual Update for Accountants and Auditors | AUAA | \$279/\$314 | \$404/\$439 | 8 |
| 6/26 | CTCPA's Not-for-Profit Organizations Conference | NFPWEB | \$279/\$314 | \$404/\$439 | 8 |
| 6/26 | K2's Data Analytics For Accountants And Auditors | DAA-4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/26 | K2's Mastering Advanced Excel Functions | AEF-4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/27 | K2's Technology for CPAs – Don't Get Left Behind | TEC-A | \$279/\$314 | \$404/\$439 | 8 |
| 6/27 | Proven Controls to Steer You Clear of Fraud | FFC4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/27 | Surgent's Individual Income Tax Update | BIT4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/27 | The Statement of Cash Flows – The Ignored Financial Statement | KHSCF-A | \$140/\$160 | \$205/\$225 | 4 |
| 6/27 | This Year's Top Tax and Financial-Planning Ideas | IEF4 | \$140/\$160 | \$205/\$225 | 4 |
| 6/27 | The Complete Guide to Preparing Forms 706 and 709 | 706X | \$279/\$314 | \$404/\$439 | 8 |
| 6/30 | A Complete Guide to the Yellow Book | CGYB | \$279/\$314 | \$404/\$439 | 8 |
| 7/14-17 | AHI: Level I – Basic Staff Training | BST1-24A | \$835/\$835 | \$960/\$960 | 24 |

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Thursday, May 8 • Online • 6 Credits • Express Code: CCCWEB



Employee Benefit Plans Conference

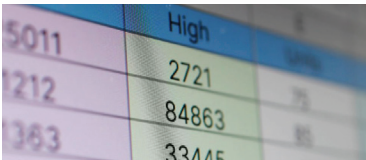
Tuesday, May 20 • Online • 8 Credits • Express Code: EBPWEB



Financial Institutions Conference

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K2's Excel Conference

Wednesday, May 21 • Online • 8 Credits • Express Code: KECWEB



Governmental Accounting and Auditing Conference

Wednesday, June 4 • Online • 8 Credits • Express Code: GAAWEB



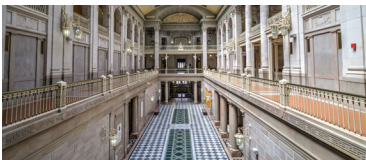
Accounting, Auditing, and Financial Reporting Conference

Tuesday, June 17 • Online • 8 Credits • Express Code: AACWEB



K2's Technology Conference

Wednesday, Jun 18 and Thursday, Jun 19 • Online • 16 Credits • Express Code: TECWEB



Insurance Industry Conference

Presented in partnership with the Iowa Society of CPAs

Wednesday, June 18 • Online • 8 Credits • Express Code: IICWEB



Not-for-Profit Organizations Conference

Thursday, June 26 • Online • 8 Credits • Express Code: NFPWEB



K2's Artificial Intelligence Conference

Monday, June 30 • Online • 8 Credits • Express Code: AICWEB



Welcome, New Members!

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

New Certified Members

Stephen A. Allegretto
Quinnipiac University

Austin Atkinson
Deloitte

Goul Gamal H. Awad
Tax & Accounting US, LLC

Justin J. Basilone
CohnReznick LLP

Stephen G. Camarro
Baystate Financial

Isabelle Chaple
PwC

Glen D. Chapman
Catholic Charities –
Archdiocese of Hartford

Tyler Gomes
RSM US LLP

Mark Harrison
MH Litigation Valuation & Forensic
Services, Inc.

Jason Keller
Fiondella, Milone & LaSaracina LLP

Megan Kikosicki
PwC

Adeyemi O. Konigbagbe
Newell Brands

Weizhong Luo
SRC, Certified Public Accountants, P.C.

Shannen Ogle
Deloitte

David Peters
CBIZ, Inc.

Matthew Sabol
Deloitte

Logan Vazquez
BDO USA, LLP

New Professional Colleagues

Matt Bradley
Bailey Scarano, LLC

Moad Chaddadi
Amideast

Dan Colton
Town of Southbury

Kevin McGee
Brown & Brown Insurance Services

Jack McOsker
Masotti & Masotti

Ryan Murphy
Nicola Yester & Company, P.C.

Erika Rosario
Courtney, Fink & Forbes LLP

Joseph P. Ullman
PwC

Cooper T. Yusko
Baruno, Hannaford, Aurello & Co.

In Memoriam



Lawrence A. (Larry) Sax, a member since March 29, 1955, passed away on January 1, 2025. He served in the U.S. Army from

1951 to 1953, working in the Army Audit Agency. He was a member of the CTCPA for 70 years, including three years of service on the Board of Governors. Larry was a founding partner of Schwartz and Sax, CPAs in 1959, subsequently a partner of Cohen, Burger, Schwartz and Sax beginning in 1999, and ultimately Beers, Hamerman, Cohen & Burger until his passing.



Member News

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

Visconti & Associates, P.C. has announced the admission of **Peter Visconti** as a member of the firm in the Assurance Division and **Margaret Pittala** as a member of the firm in the Tax and Advisory Division. The firm is now operating as **Visconti Pittala & Associates LLC**.

SRC, Certified Public Accountants, P.C. in Glastonbury announced two new partners:



John W. Luo

John W. Luo has nearly 30 years of experience in public accounting. His expertise encompasses financial statement audits, review and compilations, along with tax services for both businesses and individuals across varying levels of complexity. John serves as a certified QuickBooks ProAdvisor, helping clients streamline their financial operations.



Shawn R. Gessay

Shawn R. Gessay has more than two decades of experience in public accounting. Shawn provides assurance and tax services to privately held businesses and their owners including those in the construction and manufacturing industries.



Bill Claffey

Bill Claffey, a tax attorney and partner at Fiondella, Milone & LaSaracina LLP, was quoted in the *Hartford Business Journal* article, "Proposed R&D tax credit boost 'a huge win' for CT bioscience firms."



Katie Anderson

Nicola, Yester & Company, P.C. has named **Katie Anderson** a partner. She has more than 30 years of experience in public and private accounting, working in a wide variety of industries including manufacturing and distribution, retail, nonprofit and governmental accounting, internal audit, Sarbanes-Oxley compliance, insurance, and real estate. In addition, **Kristin Lombardo** joined the firm as staff. She has more than 25 years of experience in public accounting.

CohnReznick LLP announced the election of new partners:



Jay Civitollo

Jay Civitollo specializes in alternative investment vehicles, including private equity funds, hedge funds, and real estate funds. His primary area of expertise lies in Small Business Investment Company (SBIC) funds, where he provides extensive guidance and support to both established and newly formed funds.



Christopher Nardone

Christopher Nardone focuses on employee benefit plan audits, manufacturing and distribution, and retail and consumer with a specialty in dealerships.

Innovative CPA Group (ICG) announced mergers with **T.M. Byxbee Company, P.C.** of Hamden as well as **Robert J. Creamer, P.C.** in Ridgefield. The combined firm will offer an expanded suite of accounting, tax, audit, advisory, and consulting services and will operate under the name The Innovative CPA Group, LLC.

Whittlesey has welcomed two new managers:



Dale C. Boutot

Dale C. Boutot is a Senior Tax Manager who brings more than 20 years of experience in public accounting. Specializing in closely held businesses and their owners, Dale provides comprehensive tax, assurance, and consulting services tailored to their unique needs. He serves on the Board of Directors at Seabury, Inc. and participates in the Watch D.O.G.S. program at Greene Hills School, promoting student success through family engagement.



Sarah O'Neill

Sarah O'Neill is a Tax Manager with more than five years of public accounting experience, including time at a global firm. Sarah specializes in federal and state tax compliance, serving clients in the consumer products, manufacturing, and professional services industries.



Amanda Bristol

Baker Tilly US, LLP welcomed **Amanda Bristol** as a Senior Tax Manager. In this role, she will provide tax planning, preparation, and accounting services to individual clients as well as businesses in various industries. Amanda is a board member of The Center for Empowerment and Education in Danbury, whose mission is to break the cycle of interpersonal violence through empowerment, education and support services.

The Innovative CPA Group Volunteers in Local Community



The Innovative CPA Group (ICG) gave back to the community through a series of volunteer initiatives. Employees partnered with Walnut Hill Community Church in Bethel and Spooner House in Shelton to package and organize goods in preparation for distribution among local families. The firm also collaborated with TEAM Inc. to support their Toys 4 Kids toy drive and supported the Daily Bread Food Pantry in Danbury.

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Help Wanted

Senior Accountant with Auditing Experience – Simone Macca & Larrow LLP is seeking a Senior Accounting Professional with 5+ years experience in auditing to join our certified public accounting firm. Our offices are located in Wallingford and Wethersfield. We are currently hiring in both locations. This opportunity includes working on overhead audits and project closeout audits. You will be part of a team that performs yellow book audits as well as preparing tax returns and working on accounting engagements. The ideal applicant will be a CPA with auditing experience, be able to work well as part of a team, be proficient in Microsoft Office and expe-

rience with ProSystem fx Engagement software and Yellow Book experience is a plus. Simone Macca & Larrow LLP offers a diverse clientele, growth potential with fast track to partnership, compensation above our competitors, a 401(k) company match and a flexible work schedule. If you are a dedicated accounting professional, conscious of quality and looking to grow your career please email dawn@maccacpa.com. AN AFFIRMATIVE ACTION/EQUAL OPPORTUNITY EMPLOYER – Simone Macca & Larrow LLP is an equal opportunity/affirmative action employer and strongly encourages the applications of women, minorities, and persons with disabilities.

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