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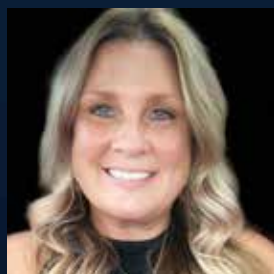
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**Katherine M. Patnaude,
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**Jennifer J. Schempp,
CPA**



**Lindsay Tessler,
CPA**

Meet this year's winners, who will be honored at a special event at the TPC River Highlands on January 17.

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2024 CTCPA Annual Meeting

This event is back in person
by popular demand!

Thursday, May 16
Aqua Turf Club, Plantsville • 5:30 p.m.

Show your support – become a sponsor.

To reserve your sponsorship, contact Cindy Panioto: cindyp@ctcpas.org • 860-258-0213

www.ctcpas.org/AnnualMeeting

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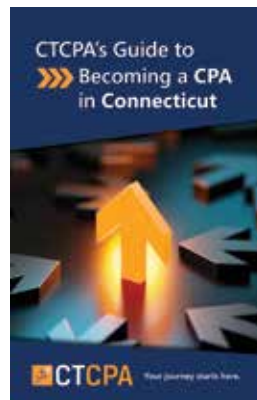


Editor's Note

New CPA Exam Launches

We have the latest resources and information for CPA candidates and their employers.

CPA Evolution, a multi-year initiative of the National Association of State Boards of Accountancy (NASBA) and the American Institute of Certified Public Accountants (AICPA), has been transforming the CPA licensure model to meet the needs of today's and tomorrow's employers and business community. CTCPA members and leadership weighed in on many of the changes throughout the process through meetings and responses to exposure drafts.



CTCPA's Guide to Becoming a CPA in Connecticut has been updated to reflect the latest changes.

With the new CPA Exam launched, we have released a new version of *CTCPA's Guide to Becoming a CPA in Connecticut*. This comprehensive 20-page guide walks CPA candidates through the process of education, examination, experience, ethics, and application. Updates will reflect the new CPA Exam sections, the expanded 30-month testing window, and other changes. The guide is available digitally as well as in print for distribution at Connecticut colleges and universities and at events for aspiring CPAs.

Download the booklet or request your print copy at www.ctcpas.org/BeACPA.

In addition, the Connecticut State Board of Accountancy has announced various CPA Exam credit extensions:

- In response to significant pandemic-related health, economic, education, and travel disruptions resulting in CPA Exam candidate hardships, credits that expired between **January 30, 2020 and May 11, 2023 are extended to June 30, 2025.**
- Due to the limited testing schedule and delayed score releases in 2024, any candidate with credit(s) on **January 1, 2024** will have such credit(s) extended to **June 30, 2025.**
- In addition, a new 30-month testing window (increased from 18 months) applies to candidates for CPA Exam credit earned **after October 1, 2023.** Individuals who earned credit for a section **between April 1, 2021 and October 1, 2023** will also be able to take advantage of the 30-month window if they apply to take a subsequent section of the exam.

Exam Review Course Discounts and Personalized Help on the Path to CPA

We're here to support aspiring CPAs every step of the way with discounts on CPA Exam review courses, help ensuring all requirements are met, and one-on-one guidance to help navigate the process. Learn more at www.ctcpas.org/BeACPA or reach out to our membership team at membership@ctcpas.org.



See you next issue,

Kirsten Piechota, Managing Editor

Filling the Pipeline

Finding and retaining talent is a top concern for the profession, but the number of new CPAs continues to decline both in our state and across the country. A strong and diverse pipeline of students entering the profession is imperative to future success and growth. The fall is a busy and exciting time as we work to engage the next generation and make sure they're aware of all the opportunities accounting and finance careers have to offer.

Accounting Is My Major (AIM) High School Programs at Connecticut Colleges

Our popular Accounting Is My Major (AIM) programs bring high school students from across the state to Connecticut colleges and universities. This fall, participants heard from college faculty and students as well as those working in the profession at Southern Connecticut State University, the University of Connecticut, and the University of Hartford.



Javim Gordon leads a student session at the Southern Connecticut State University AIM event.



Muhammad Malloy of CohnReznick LLP (left) and Michelle Duda of Crowe LLP participate in a panel discussion at the University of Hartford program.



CTCPA Past President Mike Maksymiw of Aprio tells students at the UConn event about CTCPA Student Membership.

Classroom Visits for Accounting Opportunities Experience

As part of a nationwide initiative, we joined forces with the American Institute of CPAs and other state CPA associations for the Accounting Opportunities Experience. Our goal was to get members into as many classrooms as possible to share their stories about their career paths and to inspire tomorrow's CPAs.

Mario Bucciero of Marcum LLP spoke at Xavier High School in Middletown as part of the Accounting Opportunities Experience. Here's what business teacher Michael Kohs had to say about Mario's presentation to his students:



Michael Kohs
Business Teacher
Xavier High School

"Mario's presentation was a great way for my students to learn more about the accounting profession. I received several positive emails from the parents of students who went home and discussed the class with their families that evening. It certainly was an impactful experience for my students."

Interview Day Hosts 214 Accounting Job/Internship Interviews

The CTCPA hosts Interview Day each fall, bringing top accounting students together with hiring companies for a day of job and internship interviews.

Interview Day 2023 drew 24 companies interviewing 52 students for a total of 214 individual interviews in one day.





From the Executive Director and CEO

You've Asked and We're Delivering: Increased In-Person Events



As we continue to look at new ways to deliver value and make our organization future-ready, we've put a strong focus on connecting with members across various demographics and areas of specialization.

This fall, I've been lucky to meet with members including managing partners, small firm owners, Premier Members, committee members, and many more. These meetings are the perfect opportunity for me to hear from you. It's imperative that my team and I gather information on your challenges, your view of the future, and what things you'd like to be able to wave a magic wand and make happen.

Since the pandemic, we've been here for you virtually with education, roundtables, committee meetings, and more. These online programs have been well-received, and they're not going anywhere. But I've been hearing more and more that you're ready to get out there and network ... and perhaps more importantly, your new and young team members need these opportunities to connect.

We were thrilled that our first-ever Attorneys, Bankers, and CPAs (ABC) Event was well received and sold-out. We also held a highly successful DRS Liaison Dinner. Below, member Michael Welch shares the value that program brought to him and his firm.



"The CTCPA provides valuable networking opportunities. The November DRS Liaison Dinner was a great opportunity to interact with peers and DRS staff. I attended with the goal of hearing directly from the DRS about any new initiatives or programs.

During dinner, the DRS staff wanted to hear about our experiences and any difficulties we were facing. Through a connection made at that dinner, I received a call the next morning from a specialist inquiring about how they could assist with the issue I discussed. This allowed me to resolve an ongoing issue with a 15-minute phone call."

Michael J. Welch, CPA/ABV/PFS, J.D., LL.M
Partner – Pue, Chick, Leibowitz & Blezard, LLC

In response to member requests, we are bringing the Annual Meeting back in person on May 16. Registration information for sponsors and individuals is available at www.ctcpas.org/AnnualMeeting.

I hope you and your team will join us at one of our upcoming events. Let's strengthen the community aspect you all appreciate, and show your newer employees how critical building their network is.

Bonnie Stewart, Executive Director & CEO

First Attorneys, Bankers, and CPAs (ABC) Event a Sold-Out Success



CTCPA members packed Carbone's Prime for the first Attorneys, Bankers, and CPAs (ABC) Event. Representatives from sponsor Robinson+Cole and three different banks were on hand to help our CPAs broaden their networks. Stay tuned for more details on a Fairfield County ABC Event this spring.

Members Connect with DRS Officials at Liaison Dinner



Members had the opportunity to connect one-on-one with DRS representatives at the CTCPA DRS Liaison Dinner held this fall at Testa's in Southington. The evening provided a unique opportunity to address concerns and get help and insight directly from the source.



CTCPA Advocacy Success: FinCEN Extends Deadline for Companies Created or Registered in 2024 to File BOI Reports

The Financial Crimes Enforcement Network (FinCEN) issued a final rule that extends the deadline for certain reporting companies to file their initial beneficial ownership information (BOI) reports with FinCEN.

The Connecticut Society of CPAs joined the AICPA and fellow state CPA societies to advocate for the extension.

Reporting companies created or registered in 2024 will have 90 calendar days from the date of receiving actual or public notice of their creation or registration becoming effective to file their initial reports. FinCEN will not accept BOI reports from reporting companies until January 1, 2024 – no reports should be submitted to FinCEN before that date.

This extension will give reporting companies created or registered in 2024 more time to become familiar

with the guidance located at www.fincen.gov/boi, and to resolve questions that may arise in the process of completing their initial BOI reports. FinCEN also anticipates that this deadline extension will make compliance easier for these first filers under the new reporting requirement and will promote the creation of a highly useful BOI database, as required by Congress.

Reporting companies created or registered before January 1, 2024 will continue to have until January 1, 2025 to file their initial BOI reports with FinCEN, and reporting companies created or registered on or after January 1, 2025 will continue to have 30 calendar days to file their initial BOI reports with FinCEN.

>> **Learn more and find BOI professional development at www.ctcpas.org/BOI.**

Become a Legislative Key Contact

To prepare for the 2024 session, we must update our key contact list for our federal and state legislators. If you have a relationship with your legislator, please fill out our legislative key contact form at www.ctcpas.org/KeyContact. Member involvement and personal relationships are vital to make our legislative efforts as effective as possible.

Connecticut State Board of Accountancy Vacancies

There continue to be two vacancies for non-CPAs on the State Board of Accountancy (SBOA). If you know of someone who might be appropriate for this role, please contact Bonnie at bonnies@ctcpas.org or 860-258-0214.



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Learn. Connect. Thrive. MEMBER Meetings

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



Fairfield County Networking Event

Thursday, January 25 • 4:00 - 6:00 p.m.
The Water's Edge at Giovanni's • Member Fee: \$50

Sponsored by:



Cannabis Committee Meeting

Thursday, January 18 • 9:00am - 10:00am • Online



Educators FOOD Group Meeting

Friday, January 26 • 9:30am - 11:00am • Rocky Hill
Friday, April 26 • 9:30am - 11:00am • Rocky Hill



Employee Benefit Plans Committee Meetings

Wednesday, January 31 • 8:30am - 9:30am • Online
Wednesday, April 24 • 8:30am - 9:30am • Online



TechConneCT Roundtable: Discussion of Windows 11 and Other New Office 365 Products

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



CTCPA Town Hall Meetings

Many of our members have requested an opportunity to gather regularly and discuss issues affecting the profession. For our first meeting, CTCPA Executive Director and CEO **Bonnie Stewart** will give a preview of the upcoming legislative session – set to kick off on February 7 – with a focus on issues most relevant to the business community.

- Wednesday, January 24 • 9:00am - 10:00am • Online
- Wednesday, February 21 • 9:00am - 10:00am • Online
- Wednesday, March 27 • 9:00am - 10:00am • Online
- Wednesday, April 17 • 9:00am - 10:00am • Online
- Wednesday, May 22 • 9:00am - 10:00am • Online
- Wednesday, June 19 • 9:00am - 10:00am • Online
- Wednesday, July 17 • 9:00am - 10:00am • Online
- Wednesday, August 21 • 9:00am - 10:00am • Online
- Wednesday, September 18 • 9:00am - 10:00am • Online
- Wednesday, October 16 • 9:00am - 10:00am • Online
- Wednesday, November 27 • 9:00am - 10:00am • Online



Small Firm Roundtables

All small firm owners, partners, and principals are invited to join CTCPA Executive Director and CEO **Bonnie Stewart** for open discussion on topics of importance to small firms.

- Wednesday, January 31 • 9:00am - 10:00am • Online
- Wednesday, April 24 • 9:00am - 10:00am • Online
- Wednesday, July 24 • 9:00am - 10:00am • Online
- Wednesday, October 30 • 9:00am - 10:00am • Online



Free Professional Headshots – At Our Office or Yours!

By appointment:

Thursday, January 25
9:00am - 1:00pm • Rocky Hill

Thursday, February 29
9:00am - 1:00pm • Rocky Hill

In addition to our popular member headshot days held at the CTCPA office, our communications team also visits companies to offer headshot events for employees on-site. Headshots are free for members and offered at a reduced fee for support staff.

To request a photographer to come to your office, please reach out to **Alyssa Boerenko** at alyssab@ctcpas.org.

CTCPA Committees and Groups

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



Accounting, Auditing, & Financial Reporting Committee

Discuss exposure drafts and enhance relationships with standard-setters.

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



Bylaws Committee

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

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



Cannabis Committee

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

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



Company Administrators Group

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

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



Educators FOOD Group

Discuss hot topics in this candid, conversational group.

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



Employee Benefit Plans Committee

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

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



New England ESG Consortium

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

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



Fairfield County Chapter

Meet for networking and educational events in Fairfield County locations.

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



Federal Taxation Committee

Discuss issues and build relationships with legislators and regulators.

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



Financial Institutions Committee

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

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



Golf Committee

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

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



Governmental Accounting & Auditing Committee

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

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



Investment Committee

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

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



Membership Committee

This group of company ambassadors help the CTCPA with recruitment as well as evaluating member benefits.

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



New & Young Professionals Cabinets

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

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



Not-for-Profit Organizations Committee

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

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



Peer Review Committee

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

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



Professional Ethics

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

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



Southeastern CT Chapter

Meet in locations across Southeastern Connecticut.

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



State Taxation Committee

Navigate the regulatory and legislative aspects of Connecticut tax compliance.

Contact: *Alyssa Boerenko* • alyssab@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 Committee

Meet for discussion of taxation, trusts, gifting strategies, and more.

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



The Role Accountants Can Play in Preparing for Future ESG Requirements

By Patti Martin, Audit & Assurance Managing Director, Accounting and Reporting Advisory Services, Deloitte & Touche LLP

The business world is undergoing a profound transformation that extends far beyond traditional financial statements and profit margins. The pace of societal change and environmental impacts has elevated the focus around the impact of business activities on the environment and society. Environmental, Social, and Governance (ESG) considerations have often become embedded into the enterprise risk management process, influencing investment decisions, shaping corporate reputations, and impacting regulatory requirements.

In today's dynamic business environment, ESG risks can present both potential challenges and promising opportunities. As ESG impacts can emerge rapidly, generating financial

and economic impact, it is important to establish a systematic and integrated approach to address environmental and social disruptors. Businesses that can adapt to these changes can gain a competitive advantage. It is imperative for organizations to proactively navigate this ever-evolving landscape, often using ESG principles as a guiding compass to steer toward a sustainable and profitable future.

Broadly, accounting professionals often find themselves at the epicenter of this transformation, playing an important role in helping organizations not only comply with emerging ESG standards, but also thrive in an increasingly sustainability-conscious world. With ESG disclosures and reporting gaining prominence among investors, consumers, and stakeholders, there is generally a demand for greater transparency and accountability from businesses. The role of accounting professionals in supporting these changing stakeholder expectations has never been more evident.

Understanding the ESG Regulatory Landscape

Recent developments from government regulators and international sustainability standard setters show signs

of ESG disclosure convergence. The European Union (EU) recently enacted the Corporate Sustainability Reporting Directive (CSRD), mandating that companies with operations in the EU, meeting specific criteria, must submit annual sustainability reports alongside their financial statements.

In the U.S., the most recent rulemaking agenda of the U.S. Securities and Exchange Commission (SEC) includes proposed climate change, human capital management, and corporate board diversity disclosures. These rules would require companies to incorporate specific climate-related disclosures, human capital management details, and information about the diversity of board members and nominees within their registration statements and periodic reports.

Individual states have also begun to propose or adopt climate-related regulation. California's recent climate legislation would require businesses that operate in California to publicly disclose and obtain assurance on greenhouse gas emission data by 2026. It would also mandate public disclosure of their exposure to physical and transitional climate risks, along with the measures they are employing to address them.

It is imperative for organizations to proactively navigate this ever-evolving landscape, often using ESG principles as a guiding compass to steer toward a sustainable and profitable future.

Similar initiatives are also in motion in various states, including New York, where Senate bills S5437 and S897A are in the initial stages of the legislative process.

With climate regulations becoming a reality, businesses will likely face pressure to establish and strengthen governance and internal controls in ESG and climate measurement and disclosures. This may involve building cross-functional teams encompassing finance, legal, strategy, compliance, and various other departments. Accountants should also support responsible ESG policies and practices within their organizations, in an effort to achieve compliance and remain competitive.

Understanding the Impact on Financial Reporting

Accountants should be prepared to delve into the intricacies of ESG metrics and their impact on financial reporting. This involves recognizing how ESG factors can intersect with financial performance and risk management, ultimately influencing investment decisions and the overall sustainability of an organization.

For instance, a company's carbon emissions, labor practices, or data security breaches can influence its financial health and reputation. Accountants should familiarize themselves with the connections between ESG issues and financial disclosure because they may play a notable role in the evolving ESG landscape.

Moreover, it is also important for accountants to acquire a comprehensive understanding of ESG reporting. This understanding can help with navigating the intricate web of ESG considerations. Accountants should familiarize themselves with established ESG frameworks and standards, as they have played a significant role in the formation and communication of emerging ESG regulations. Notable frameworks include the Global Reporting Initiative (GRI), the Sustainability Accounting Standards Board (SASB), the Task Force on Climate-related Financial Disclosures (TCFD), and the Greenhouse Gas (GHG) Protocol.

These frameworks can provide valuable guidance on how companies should measure, report, and disclose their ESG data, offering a structured approach to ESG reporting that ensures consistency and comparability across industries and regions.

By embracing these standards, accountants can help organizations accurately capture their ESG data, with the aim of fostering transparency, credibility, and trust among stakeholders. Their role positions accountants as leading contributors guiding organizations to meet ESG reporting requirements.

Integrating ESG into Financial Practices

Accountants can play a valuable role in integrating ESG considerations into financial practices, but this is likely no small task. The following are practical strategies that accountants can use to help streamline the integration of ESG into an organization's financial practices:

Upskill, Educate, and Socialize

Accountants should proactively build their competencies in ESG-related topics. To start, accountants should immerse themselves in existing sustainability reports and ESG disclosures to gain insights into leading practices and emerging trends. By scrutinizing these reports, they can learn from the experiences of other organizations and enhance their own ESG reporting capabilities. Also, there are many low and no-cost educational resources available, including specialized ESG training programs and sustainability-focused certifications.

Collaboration within organizations is another significant facet of integrating ESG into financial practices. As organizations begin to mobilize around the ESG market accelerations, there is generally recognition that ESG can no longer be managed in a silo or disconnected from the business. To shift ESG from merely a compliance exercise, it is important for all organizational functions to lean into ESG opportunities to drive overall business performance. Accountants should engage with ESG

Accountants should be prepared to delve into the intricacies of ESG metrics and their impact on financial reporting. This involves recognizing how ESG factors can intersect with financial performance and risk management, ultimately influencing investment decisions and the overall sustainability of an organization.

specialists within their organizations who have experience in sustainability, ethics, and social topics and impacts.

This collaborative approach fosters a holistic understanding of ESG issues and encourages the development of a comprehensive strategy for addressing them. By tapping into the collective knowledge and skills of diverse team members, organizations can forge a more robust and effective ESG framework that aligns with their broader objectives.

Establish Internal Controls

In the current regulatory environment, emphasis is often placed on complete, accurate, reliable, and decision-useful financial reporting practices and internal controls. ESG reporting will be subject to similar process and scrutiny.

Understanding both financial accounting and ESG disclosures is imperative, and accountants have a unique opportunity to leverage existing skill sets to drive consistency between financial and ESG reporting governance. Establishing effective governance over the control environment over ESG reporting is important and sets the foundation for effective internal controls for ESG reporting.

Accountants can bring rigor to the overall risk assessment process, including identification of ESG and climate-related risks and opportunities, documentation and testing of business and IT pro-

(continued)

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cesses and controls to mitigate these risks, and an understanding of activities needed to monitor the effectiveness of controls established over this new non-financial data.

Leverage Existing Technology and Streamline ESG Data

Streamlining ESG data collection is vital, considering that sustainability data can originate from various corners of an organization, often without validation or review. This is where the finance department's role comes into play, as it can help develop strategies for collecting, analyzing, and reporting ESG data alongside traditional financial data.

By leveraging existing technology and data analytics tools, organizations can significantly enhance the accuracy and efficiency of this process. Technology can play a central role in this transformation by facilitating the monitoring of global reporting requirements, managing overlapping ESG standards and frameworks, and enabling seamless multilingual and multi-jurisdictional re-

porting. Automation and standardization also come into play, ensuring that reporting is streamlined, consistent, and reliable.

Integrating ESG metrics into financial analysis and risk assessments is important for a holistic view of a company's performance. Accountants can further contribute by helping organizations establish leading practices for ESG risk assessment and mitigation.

The early identification of ESG risks, coupled with proactive mitigation strategies, can protect a company's financial stability, brand value, and reputation. This proactive stance aligns with the evolving expectations of stakeholders who are increasingly concerned with ESG matters, making it a strategic imperative in today's business landscape.

Enhance Stakeholder Communication

Accountants also play a role in transparently communicating an organiza-

Developing clear and accessible ESG reports and disclosures is not merely a matter of compliance; it can be a means to authentically showcase an organization's dedication to sustainability principles.

tion's ESG efforts to stakeholders. Effective communication in this domain can significantly impact an organization's relationships with investors, regulators, customers, and the wider public, fostering trust and demonstrating a genuine commitment to responsible business practices. Developing clear and accessible ESG reports and disclosures is not merely a matter of compliance; it can be a means to authentically showcase an organization's dedication to sustainability principles.

Stakeholders increasingly demand meaningful and relevant information



Learn More:
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about a company's ESG initiatives. Accountants can contribute by assessing if the ESG reports are accurate, clear, and comprehensive – and aligned with reputable standards. These reports should not only highlight achievements but also acknowledge challenges and the steps taken to address them. Clarity and transparency are vital, enabling stakeholders to make informed decisions and holding organizations accountable for their ESG commitments.

As the business landscape evolves, the demands for transparency, responsibility, and sustainability will likely only intensify. The role of accountants in preparing for future ESG requirements will likely be significant. Accountants can stand as the bridge between financial data and ESG reporting, allowing organizations to effectively navigate this transformative journey.

By staying informed about the ever-changing regulatory landscape, integrating ESG practices into financial processes, and engaging with stake-

holders, accountants can help their organizations thrive in a world where environmental, social, and governance considerations are at the forefront of decision-making. Moreover, accountants' experience and contributions will be important in creating a more sustainable and responsible global business environment.

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Interested in ESG?

Join the New England ESG Consortium

The New England Environmental, Social, and Governance (ESG) Consortium, presented in partnership with the New Hampshire Society of CPAs and the Maine Society of CPAs, is designed for finance professionals in public practice, industry, and academia to discuss and collaborate on sustainability reporting, disclosures, risk management, and more.

Join at www.ctcpas.org/Committees or email Cindy Panioto at cindypanioto@ctcpas.org.

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Celebrating those at the forefront

Congratulations to this year's
CTCPA Women's Awards
recipients, including our own:

- **Rebecca Lyman** – 2024
CTCPA Women to Watch

**Melissa Ferrucci, CPA, Partner,
and the Partners of CohnReznick**

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CTCPA Women's Awards

Celebrating Connecticut's exceptional female CPAs

The fifth annual CTCPA Women's Awards program returns to the beautiful TPC River Highlands on Wednesday, January 17, 2024 to recognize the many contributions female CPAs are making in Connecticut.

This year, a record 14 outstanding women will be honored in three categories:

- Distinguished Service
- Women to Watch
- Aspiring CPAs (new this year!)

Learn about their robust accomplishments on the pages that follow.

Renowned iHeartRadio personality **Renee DiNinno** leads us in the festivities, which will include an inspirational "fireside chat" interview with keynote speaker **Beth Costello**, executive vice president and chief financial officer at The Hartford.

As CFO, Beth is responsible for finance and accounting, treasury, strategic sourcing and real estate, corporate strategy, and investor relations. She serves as the executive sponsor for The Hartford's Flex-Abilities Network, an employee resource group dedicated to finding ways to advance the philosophy that every person is capable of full productivity in work and life. Active in her local community, she is also on the boards of The Village for Families and Children and The Hartford Bishops' Foundation, and is board chair of The Bushnell Performing Arts Center in Hartford.

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Keynote Speaker

Beth Costello

Executive Vice President
and Chief Financial Officer –
The Hartford



Emcee

Renee DiNino

Director of Community Affairs
and On Air Programming –
iHeartMedia

Wednesday, January 17, 2024
TPC River Highlands, Cromwell

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

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

Keynote speaker and awards: 9:00 - 10:30 a.m.

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

Meet this year's honorees on the following pages >>



It takes balance.™

Congratulations Mary Kay Curtiss on your recognition as a 2024 CTCPA Distinguished Service Award winner, and congratulations to all the award honorees.



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Distinguished Service Award

Melissa S. Beeler, CPA

Deloitte Tax, LLP

Melissa is a managing director in Deloitte Tax's Business Tax Services (BTS) group in Hartford. In her role, she serves both SEC and non-SEC clients in a variety of industries.

What inspired you to pursue the CPA career path?

I have always enjoyed math and working with numbers. At a young age I began to help my father with the accounting for our family dairy farm. My interest continued to grow in college and after taking an introduction to accounting course, I knew it was the career I wanted to pursue.

What professional accomplishment are you most proud of?

I am most proud of rising to the level of Managing Director at the largest professional services firm in the world.

What is your next major goal?

From a professional standpoint, my goal is to continue to take on additional leadership roles within Deloitte. From a personal standpoint, I have a goal of taking part in a Spartan Race.

What is your favorite thing to do outside of work?

Outside of work I enjoy watching my kids take part in various sports and dance classes. I also enjoy working out and participating in 5Ks or obstacle course races.



Distinguished Service Award

Mary Kay Curtiss, MSPA, CPA

CLA (CliftonLarsonAllen LLP)

Mary Kay Curtiss is a principal at CLA's West Hartford office, where she specializes in providing audit services to nonprofits. She is also CLA's national nonprofit assurance leader and New England nonprofit growth network industry leader. As a Connecticut executive leadership team member, she works closely with the managing principal on office management, personnel, and finances. Additionally, she participates in CLA's national nonprofit mentoring program and serves as a board member and treasurer for the CLA Foundation.

What inspired you to pursue the CPA career path?

Initially, I had my sights set on becoming an attorney. However, after completing my undergraduate degree, my father – who happens to be a retired attorney – encouraged me to consider accounting. Looking back, it all makes perfect sense. All of my work experience since I was a teenager involved finance or accounting in some way. It wasn't until my father helped me connect the dots that I started pursuing a career as a CPA. I'm grateful for my father's insight and guidance that led me on this career journey.

What professional accomplishment are you most proud of?

My involvement with the blumshapiro and CLA foundations stands out as my most meaningful professional accomplishment. As a board member and treasurer of the CLA Foundation, I am honored to be part of an initiative that has made such an impact on many individuals and communities. With more than \$8 million raised and donated, the foundation's mission to create career opportunities through education, employment, and entrepreneurship continues to expand its reach and I am excited to continue being a part of this meaningful work.

What is your next major goal?

Professionally, I am living my best life. Working alongside a team of dedicated professionals within CLA's New England offices, the national nonprofit team, and the CLA Foundation has been an amazing opportunity. Witnessing the incredible work my clients do in their communities has been a humbling and inspiring experience. Having just been appointed national nonprofit assurance leader at CLA, I am eager to expand my horizons and grow in that role. I look forward to this next adventure and the opportunities that lie ahead.

What is your favorite thing to do outside of work?

I love watching my kids play their favorite sports – baseball, hockey, and soccer. Reading is also a passion of mine, and I enjoy switching between legal dramas, historical fiction, romance novels, and psychological thrillers depending on my mood. And when the urge strikes, I'm always up for a spontaneous interior decorating project. There's just something about a fresh coat of paint that can completely change the vibe of a room and make it feel brand new.



Distinguished Service Award

Stacy R. Farber, CPA

UHY LLP

Stacy is an audit partner for UHY LLP, where she serves as the audit and assurance practice leader for the Connecticut office as well as the Northeast Region Employee Benefit Plan practice leader. She also serves as a public member of the Connecticut State Board of Accountancy.

What inspired you to pursue the CPA career path?

My mom actually suggested it. I was always really good in math, so in high school I took a bookkeeping class. I found it very easy, so I decided to give accounting a try.

What professional accomplishment are you most proud of?

Taking my kids to see me win a Top Women in Business Award from the *Hartford Business Journal* was one of my proudest moments. Becoming a CPA was the first professional accomplishment I was proud of. Over the last year, getting appointed to the Connecticut State Board of

Accountancy, being promoted to partner, and receiving this award have all made me incredibly proud of the work I'm doing.

What is your next major goal?

The next goal is to become the office managing partner of the UHY LLP Connecticut office.

What is your favorite thing to do outside of work?

Take my girls, ages 8 and 5, to the beach and watch them run around and have fun. Seeing the pure joy on their faces makes it all worth it.



Distinguished Service Award

Teresa J. Opalacz, CPA

Guilmartin, DiPiro & Sokolowski LLC

Teresa is an audit and consulting partner with Guilmartin, DiPiro & Sokolowski, LLC. She works with her fellow partners on planning, quality control, talent, and process optimization. She was formerly a partner with PwC in hi tech, utilities, and not-for-profit. She is on the Executive Board of the Middlesex Chamber of Commerce, serving the strategic and finance committees. She is also on the Mercy High School Finance Committee and External Relations and the Town/Board of Education coordinating finance committee for her town. In addition, she serves as corporator at Liberty Bank and Middlesex Hospital, along with several other volunteer endeavors.

What inspired you to pursue the CPA career path?

Given that I started college as a math/pre med major, I really can't say I had an inspirational moment to pursue accounting. It was more the realization that I was ready to start my career as opposed to post-graduate studies. I chose the economics/accounting major because I saw it as a massive opportunity to pursue a variety of financial endeavors and it provided me the work experience to move on to other ventures. I learned a CPA can explore many paths. Additionally, the profession encourages community involvement – a passion of mine since I was a kid – and provided me the opportunity to learn and interact with individuals that I truly looked up to and inspired me.

time partner. I am most excited that I have been able to juggle my professional and personal life and made the most appropriate adjustments at certain times to help both sides of my life flourish.

What is your next major goal?

My goal is always to be as proactive as I can be within my firm and the community. I love to give back to those that have been there for me in my life and career. Our business world is changing and if I can continue to motivate and mentor so as to move the profession forward thoughtfully and strategically, my forever goals will be closer to reality.

What is your favorite thing to do outside of work?

I love being with friends and family enjoying sports, a hike with my dog, a vacation with my family, coaching, or volunteering for a special cause. I do stay active with minimal down time. Let's be honest, anything outside of work can be fun.

What professional accomplishment are you most proud of?

I was the first female partner in the Hartford office of PwC and subsequently, when I started my family, the first part-



Congratulations to Teresa Opalacz, CPA

on being one of this year's Distinguished Service Award Recipients.

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Distinguished Service Award



Jennifer J. Schempp, CPA

Beers, Hamerman, Cohen & Burger, PC

Jennifer is a partner at Beers, Hamerman, Cohen & Burger, PC and is part of the team that oversees the audit and assurance practice at the firm. She has expertise in the employee benefit plan industry, specializing in ERISA plan auditing. She is treasurer of Orange Little League and the Orange Chamber of Commerce and is also an active member of many CTCPA committees and has served on the Advisory Council.

What inspired you to pursue the CPA career path?

My CPA career path started when I took an accounting class in high school. I really enjoyed it and decided to major in business in college. The accolades that come along with being a CPA are what drove me to get certified. I wanted to be the best of the best in the field of accounting.

What professional accomplishment are you most proud of?

I am most proud of being promoted to partner at my firm. This has allowed me to lead an amazing team of men and women who I consider some of the best people I've ever met. My partnership has given me the opportunity to lead, coach, and mentor some great professionals including other women who are CPAs or aspiring CPAs in a mostly male-dominated profession and provide them with the guidance they need to become great leaders, too.

What is your next major goal?

My next major goal is working with the leadership team at our firm to continue building a successful workplace that is second to none – a place where our clients love working with us and our employees feel supported, engaged, and inspired to lead and inspire others.

What is your favorite thing to do outside of work?

My favorite thing to do outside of work is watch my two boys, Ryan and Jameson, doing what they love – playing baseball and hockey. If I am not at the office, you will find me and my husband Geoff at the baseball field or at the hockey rink. I've coached my younger son's baseball team since he was in tee ball and my husband coaches his youth hockey team. We are both extremely involved in the town's little league and the youth hockey association. In the time I do have to myself, I really enjoy playing golf.

Hear Inspiration and Insight in Our Awardee Video Series

We asked our honorees about what brings them joy in their careers as accountants, what advice they would give their younger selves, and why they are pursuing the CPA designation.

Their inspiring video responses will premier at the January 17 event and will then be available to view and share at www.ctcpas.org/CTCPAWomen.





Women to Watch

Rebecca W. Lyman, CPA CohnReznick

Rebecca is a senior manager in CohnReznick’s not-for-profit and construction industry practice groups. She works at both a local and national level with various teams to improve audit efficiency and provide value-added recommendations to clients. She leads a number of client engagements as well as several committees within the firm. She is also very active in several community service organizations.

What inspired you to pursue the CPA career path?

My journey started with a strong interest in and passion for accounting. I really enjoyed the work in my accounting courses in school. From there I interned with a public accounting firm and really enjoyed not only the work, but also the team mentality and the opportunity to work closely with clients.

What professional accomplishment are you most proud of?

One of the things I take a lot of pride in is the advancement of my team members. I have worked with a number of employees over the years at the firm and there are many that I’ve coached, both formally and informally, to help them

reach their own personal goals for career advancement. I find enjoyment in helping my team members succeed and have been fortunate to work with some very motivated and hard-working individuals over my years at CohnReznick.

What is your next major goal?

I am currently on the path to partner and hope to be promoted within the next few years.

What is your favorite thing to do outside of work?

I am an avid reader and I read and review books for publishers. I also enjoy spending time with my family, especially my sons and my husband.



Women to Watch

Amber Moore, CPA Goldblatt Bokoff LLC

Amber is a partner with Goldblatt Bokoff, providing tax, assurance, and advisory services to small to mid-size businesses as well as handling many of the firm’s internal technology needs. Amber has served the CTCPA as Advisory Council Chair, a member of the Board of Directors, and Technology Committee Chair.

What inspired you to pursue the CPA career path?

My interest in accounting started in high school when I took a basic accounting course and found that it was something that came naturally to me and I actually enjoyed. I went on to major in accounting at UConn and obtain my CPA because I started to really see what an accounting degree could offer. I’ve loved working in smaller firms and really getting to know – and help – our clients in meaningful ways.

What professional accomplishment are you most proud of?

Every accomplishment is a stepping stone and I’ve been proud of each and every one of them, but I am most proud of being asked to join as a partner of our firm. I aspired to be a partner from the beginning of my career. I looked up to the partners and admired their dedication to the firm and the value they provided to our team as well as our community and clients. When I was asked to be a partner, it helped me to realize that I, too, exhibit these characteristics while also raising a family. It gave me confidence to know that I could be successful in both roles – a CPA as well as a mother.

What is your next major goal?

Now that I am a partner in the firm, I have big shoes to fill. I want to continue to grow the firm in a way that encompasses our core values while also bringing new ideas to the table and expanding what we have to offer to our clients. It is important that with all the changes in the accounting profession, we continue to stay up to date and relevant. Working with our team to allow them to grow within their own professional goals while also building the firm as a whole is essential.

What is your favorite thing to do outside of work?

I love to just spend time and relax with my family and friends. With two young children, we are always on the go and balancing their various activities, so we don’t have much down time. When we do, I enjoy getting outside or doing some kind of fun family activity. I also enjoy giving back to my local community and volunteering as much as possible with my children’s sports organizations, their school, and the local chambers. While I don’t get to do it often, I also enjoy baking and cake decorating.

Women to Watch



Katherine M. Patnaude, CPA, MSA

PKF O'Connor Davies

Katherine is an audit partner with PKF O'Connor Davies in the public sector group, providing audit and consulting services for a wide variety of municipal entities including cities, towns, boroughs, and districts. She is involved in the firm's Women's Initiative Network (WIN) as the Wethersfield office representative, contributes to the firm's Thought Leadership series, and coaches several career advisees. Additionally, she is a member of the CTCPA Advisory Council, chair of the CTCPA Governmental Accounting and Auditing Committee, and a member of AICPA Council and the Government Performance and Accountability Committee.

What inspired you to pursue the CPA career path?

I had a somewhat unusual path to the CPA. I started off college as a music major and changed my major a couple times. I took an accounting class thinking I'd be a business management major and instantly loved accounting – something about the logic and the numbers falling into place. Once I graduated, a partner at the firm I worked for right out of college inspired me to become a CPA and follow her path of giving back to the profession both with the CTCPA and AICPA.

What professional accomplishment are you most proud of?

I'm most proud of becoming a partner with my firm this past year.

What is your next major goal?

My next major goal is to continue to grow in my new role as a partner and to teach and mentor my staff so they can meet their goals as well.

What is your favorite thing to do outside of work?

My favorite thing to do is to spend time with my husband and our two kids – we love to read, make crafts or do science experiments, and play outside. On my own, I love to read, bake, and make scrapbooks.

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Women to Watch



Lindsay Tessler, CPA Whittlesey PC

Lindsay is an audit manager at Whittlesey, providing audit services to financial institutions, with a primary focus on banks, credit unions, and employee benefit plans.

What inspired you to pursue the CPA career path?

My early passion for math led me to an engaging finance and business course in high school. Volunteering at a hospital's business office showed me the appeal of financial management, and my acceptance into the UConn School of Business cemented my determination to major in accounting.

What professional accomplishment are you most proud of?

Achieving my CPA license was a pivotal milestone. Immediately after graduating from college, I embarked on a

rigorous study regimen, successfully passing all four sections within five months to secure my licensure.

What is your next major goal?

My next major goal is to become a partner at Whittlesey.

What is your favorite thing to do outside of work?

I enjoy spending time with my family and friends, especially my husband and daughter.

Aspiring CPAs



Marissa Bartone Ernst & Young

Marissa is an audit senior in the financial services sector of Ernst & Young. She provides assurance services for high-profile insurance clients, develops effective audit strategies, and drives efficiencies within audit procedures. Additionally, her role includes developing newly hired assurance professionals and personally engaging across teams and with clients.

What inspired you to pursue the CPA career path?

I have always been interested in the financial operations of companies and in understanding complex financial information as it relates to business operations. The CPA career path provides an excellent avenue to be exposed to a variety of financial and accounting disciplines where the most valuable asset is critical thinking. I was also inspired by the future opportunities that are available to CPAs to apply these disciplines in industry.

What professional accomplishment are you most proud of?

I am very proud of passing the CPA Exam prior to starting full time with Ernst & Young. I focused on passing all parts of the exam during my fifth-year master's program at Fairfield University in order to kick-start my career and be prepared for full-time employment in public accounting.

What is your next major goal?

My goal is to continue my career in public accounting to gain more exposure to our client base and greater experience. I hope to engage more in my local community as well as in campus recruiting events to help build interest in the accounting profession.

What is your favorite thing to do outside of work?

Outside of work, I love spending time at the beach with friends and family. I enjoy cooking and baking, and love to spend time with my dog Maggie!

Aspiring CPAs



Bridgette Eguizabal Kaman Corporation

Bridgette is a senior internal auditor at Kaman Corporation. She is part of the internal audit department, a team responsible for conducting various types of audits in order to provide objective assurance that the company's governance, risk management, and internal control environment are operating effectively.

What inspired you to pursue the CPA career path?

My decision to take an accounting class during my senior year of high school is what drove and inspired me to take this career path. I was always intrigued with every lesson taught and assignment given. From the very first week of that class I realized that accounting was a career path I wanted to pursue, and I haven't looked back since.

What professional accomplishment are you most proud of?

I recently earned my MBA. I am proud of all the knowledge and support I gain from others. I am constantly surrounded by individuals who teach me and motivate me to be a better person. Being a first-generation college student in my family, I want to show my nephews and niece the importance of education and learning from others.

What is your next major goal?

My next major goal is obtaining my CPA license.

What is your favorite thing to do outside of work?

I love spending time with my family. They are a huge support system for me, so I value family time a lot. I have family in Peru as well, so a trip there every year is a must.

Aspiring CPAs



Emily Kindle Whittlesey PC

Emily is a supervisor in the Whittlesey audit department. She leads and conducts financial statement audits and reviews for clients across various industries, including affordable housing, real estate entities, and non-profit organizations.

What inspired you to pursue the CPA career path?

Since high school, I was inspired to pursue the CPA career path due to my interests in finance and accounting. Achieving a CPA designation also allows for numerous career opportunities in these fields.

What professional accomplishment are you most proud of?

My most significant professional accomplishment is completing my MBA. Through this endeavor, I have acquired advanced knowledge and honed my skills in

business management. I firmly believe this foundation will be instrumental in my journey toward becoming a CPA.

What is your next major goal?

My next major goal is to pass the CPA Exam.

What is your favorite thing to do outside of work?

Outside of work, I find great joy in hosting gatherings and celebrations with my husband for our close circle of friends and cherished family members.

Aspiring CPAs



Mariam Noorzad

Ernst & Young

Mariam is a senior assurance accountant at Ernst & Young specializing in the insurance sector. She provides audit services to PCAOB and SEC registered clients by developing audit strategies, coordinating audit procedures through project management, and ensuring the highest quality of work and standards are met. She has served clients across different industries, including life insurance, property and casualty, and health insurance.

What inspired you to pursue the CPA career path?

My parents are Afghan immigrants who came to the U.S. to be able to give their children the opportunities they didn't have. I have been inspired by the women in my family, the women in business that I have met on my journey to Ernst & Young, and the women leaders I work with every day.

As a mother to two little girls, it is my goal to be an example to my daughters that the sky is not the limit, and they can achieve any goal they set their mind to.

What professional accomplishment are you most proud of?

I am most proud of being promoted to senior at Ernst & Young. This has been made possible by the support I have received through my educational and professional journey.

What is your next major goal?

My goal is to pass my remaining CPA Exam sections and obtain my CPA license.

What is your favorite thing to do outside of work?

I enjoy spending time homesteading with my daughters. Our favorite activity this last summer was planting our own vegetation from a seed and watching it grow.

Thank you to Media Sponsor iHeartRadio and renowned iHeartRadio personality and Women's Awards program emcee Renee DiNinno.



CONNECTICUT



Aspiring CPAs



Christina Roy

Fiondella, Milone & LaSaracina

As a newly minted senior audit associate at Fiondella, Milone & LaSaracina (FML), Christina works closely with team members and clients to deliver high-quality audits, constructive suggestions, and financial statements. In her new role, she will also serve as a mentor to those entering the profession as well as a communication line between interns/newer staff and upper management.

What inspired you to pursue the CPA career path?

CPAs are highly respected in the industry and across the business world. The CPA career path offers an endless amount of opportunity for individual growth and job placement. As a CPA and accounting professional, one has the option to work in any industry including public accounting, not-for-profits, private industry, personal firms, etc. In each of these sectors, one is exposed to a diverse group of people with different financial needs.

What professional accomplishment are you most proud of?

I am most proud of passing of all four parts of the CPA Exam while also handling personal setbacks, school, and part-time work. After passing my first exam section, I continued to study while working part-time at FML and passed my second section. As the countdown continued, I took some time off from FML to finish my last two sections, having passed the final test in July.

What is your next major goal?

My next major goal is to complete my two-year experience requirement to become a CPA. Fortunately, after my work as an intern and staff, I only have a couple months left to go!

What is your favorite thing to do outside of work?

I enjoy doing anything and everything outdoors. Most recently, I have gotten back into hiking and camping with my dogs, family, and friends. As time permits, I enjoy traveling to different parts of the country and taking in the sights, exploring new food, and learning about others' cultures.

Finally, I also try to be heavily involved in my community. Over the last few years I have volunteered as the head coach of my former high school's girls' recreational basketball team and I am in the process of working on a quilt for the not-for-profit Marrakech, Inc.

WOMEN WHO LEAD COUNT

Congratulations, Christina, from all of us at FML.
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Date	Title	Course Code	Member Fee	Nonmember Fee	CPE Hours	Location
1/18-19	Tax Staff Training – Advanced Issues	TSTA	\$595	\$720	16	Online
1/22	The Beneficial Ownership Report and the Corporate Transparency Act – What It Means for Small- to Medium-Sized Businesses	ACP17609	\$39	\$59	1	Online
1/23	Surgent's Update on the SECURE 2.0 Act	SEC20123	\$99	\$134	2	Online
1/25	K2's Options To Automate Your Tax Preparation Workflow	ACP17668	\$79	\$109	2	Online
1/26	Business Tax Update: Recent Developments	CPX6920	\$89	\$124	2	Online
1/29	Leveraging ChatGPT for Innovative Business Advisory Services	CPX8150	\$89	\$124	2	Online
1/30	Understanding Internal Control Constructs	CPX6951	\$149	\$214	4	Online
1/31	Tactics to Find Work Life Balance in a Complex World	CPX6954	\$55	\$75	1	Online
1/31	IRC § 199A: An Up-to-Date Review of the Pass-Through Deduction	ACP17765	\$129	\$159	4	Online
2/1	Accountants and Malpractice: Can We Get Sued for This?	CPX6970	\$89	\$124	2	Online
2/1	The Best Federal Tax Update Course by Surgent	BFTU0201	\$299	\$424	8	Online
2/2	CFO Series: Ready to be an Effective CFO? Skills to Succeed	CPX8155	\$89	\$124	2	Online
2/2	Surgent's Depreciation Rules for Bonus and Section 179 Expensing	DRBE0202	\$99	\$134	2	Online
2/3	Tax Season Update for Individuals with Steve Dilley	ACP17821	\$129	\$159	4	Online
2/5	Surgent's Preparing Individual Tax Returns for New Staff and Paraprofessionals	PITR0205	\$279	\$404	8	Online
2/6	K2's Safeguarding Taxpayer Data – A Guide For Your Required Security Plan	ACP17856	\$79	\$109	2	Online
2/7	The Best S Corporation, Limited Liability, and Partnership Update Course	BCPE0207	\$299	\$424	8	Online
2/9	Audit Quality Update and Future of Audit	CPX7053	\$89	\$124	2	Online
2/12	Individual Tax Fundamentals	AICP3790	\$332	\$403	8	Online
2/13	Cybersecurity Fundamentals for CPAs	CPX7082	\$89	\$124	2	Online
2/15	Surgent's Client Advisory Services (CAS): A Guide to the Variety of Offerings Professionals Can Provide	CAS20215	\$99	\$134	2	Online
2/16	CFO Series: Tactics to Improve Bottom Line: 1st Improve ROI	CPX8186	\$89	\$124	2	Online
2/20	Understanding the New Forms K-2 and K-3	CPX7155	\$89	\$124	2	Online
2/23	CFO Series: Measuring and Reporting – ESG and Sustainability	CPX8196	\$89	\$124	2	Online
2/26	Accounting & Auditing Update For Small Business – 2023	ACP18164	\$129	\$159	4	Online
2/26	Intermediate Individual Taxation	AICP3817	\$332	\$403	8	Online
2/27	Financial Instruments and Leases	AICP3818	\$71	\$82	1	Online
3/4	Excel for Staff Level 1 – What You Never Learned	CPX8203	\$89	\$124	2	Online
3/6	Surgent's Work-Life Balance: Maximizing Productivity and Understanding Related Tax Issues	WLB20306	\$99	\$134	2	Online
3/14	Introduction to Governmental Accounting	ACP18418	\$79	\$109	2	Online
3/18	The Corporate Transparency Act – What You Need to Know to Protect Your Client	ACP18470	\$79	\$109	2	Online
3/22	CFO Series: What We Can Do to Minimize Taxes: Without Danger	CPX8244	\$89	\$124	2	Online
3/25	Legal Planning for Care Giving of Elderly/Disabled Clients	CPX7498	\$39	\$59	1	Online
3/26	Introduction to Single Audit	ACP18568	\$79	\$109	2	Online
3/27	Peer Reviews of SSARS Engagements	CPX7535	\$89	\$124	2	Online
3/28	Not-for-Profit Accounting & Auditing Update – 2023	ACP18617	\$129	\$159	4	Online
3/29	Staying SASsy – A Look at Recent Auditing Standards	ACP18624	\$39	\$59	1	Online



Welcome, New Members!

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

New Certified Members

- Daniel H. Saucier**
Adams Samartino & Company, P.C.
- Amy Johnson**
Raytheon Technologies
- Michael J. Nowak**
Connecticut Spring & Stamping Corp.
- Vincent Cleary**
Mahoney Sabol & Company, LLP
- Nitasha W. Cable**
Crowe LLP
- Brent Rasmussen**
Deloitte
- Paige Donnelly**
Deloitte
- Chloe Wood**
KPMG
- Hua Yang**
- Julie Hutchins**
CLA (CliftonLarsonAllen LLP)
- Courtney McAuliffe**
Travelers
- Nicholas Agnelli**
Deloitte
- Jack Kneisel**
CironeFriedberg, LLP
- Harold Goodman**
Marcum LLP
- Robert D. Coro**
Marcum LLP
- Troy F. Sullivan**
Zackin Zimyeski Sullivan, LLC
- Andrew Baumgardner**
- Jeremy Kessler**
Steel Breeze Accounting & Tax, LLC
- Ruth S. Louis-Mohammed**
TXP Services, Inc., One Stamford Realty
- Jonathon S. Dillman**
Ernst & Young
- Taylor Berta**
- Augusta Kovaleski**
Ernst & Young

New Professional Colleagues

- Eusenio Campos**
CFG
- Fatima Abbas**
Deloitte
- Donna M. Baker**
MMNT, LLC
- Dawn Matarazzo**
LaQuerre Audi, LLC
- Samantha Bates**
Ernst & Young
- Seema Kunjal**
Ernst & Young
- Antonia Barbiero**
Deloitte
- Mariam Noorzad**
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- Katrina Ali**
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- Spencer Gay**
Halloran & Associates LLC
- Christina Imperioli**
The Innovative CPA Group
- Victoria Savluk**
Beers, Hamerman, Cohen & Burger, P.C.
- Francine Kasweka**
Beers, Hamerman, Cohen & Burger, P.C.
- Ryan Dunfee**
Ernst & Young
- Michael Rosenthal**
Primark Benefits
- Thomas C. Minard Jr.**
Beers, Hamerman, Cohen & Burger, P.C.
- Lee Nichols**
Marcum LLP

In Memoriam



CTCPA Past President Dr. Lawrence Gramling, a member since April 30, 1981, passed away on October 17, 2023.

Larry was an extremely active member of the CTCPA, an enthusiastic champion of the profession, and an integral part of preparing the next generation of CPAs and accounting professionals in our state.

Larry was frequently greeted at CTCPA events by the countless students he inspired over his many years as a professor at the University of Connecticut. In addition to his CTCPA service as president and a member of the Board of Governors, he was active on numerous committees ranging from Educators to Bylaws, Nominating, Audit, and more. He was also a trustee of the CTCPA Accounting Scholarship Foundation.



Member News

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



Bonnie Stewart

CTCPA Executive Director and CEO **Bonnie Stewart**, Whittlesey Managing Partner and CEO **Drew Andrews**, and FML Partner **Brian Kelleher** were all quoted in the *Hartford Business Journal* article “Numbers Crunch: Accounting firms turn to recruiters, high schools, apprenticeships in urgent search for new talent.”



Drew Andrews



Brian Kelleher



CTCPA Past President **Greg Lainas** and his wife MaryAnn were mentioned as characters in the new book *Rumor of Evil: A Novel* by Gary Braver. MaryAnn appears with her maiden name of Liczek.



Melissa Braun

Two CTCPA members were named to the 2023 *Hartford Business Journal* “40 Under 40” list:

Melissa Braun, Tax Manager at Whittlesey (who was a CTCPA Women’s Award winner in 2023), and



Neha Nathwani

Neha Nathwani, Managing Director at UHY LLP.

CLA (CliftonLarsonAllen LLP) announced several career advancements, including the following members in Connecticut:

Jessica Aniskoff – Principal, State & Local Government

Christine DiMenna – Principal, Service Specialist

Christopher Gaspar – Principal, Tax – Individual & Trusts

Stephen Reisberg – Principal, Professional Services

Cynthia Abbamondi – Signing Director, Manufacturing & Distribution

Julissa Jandreau – Signing Director, Retail

Danny A. Pannese, **Benoit Boyer**, and **Paul N. Iannone** of the Jack Welch College of Business and Technology at Sacred Heart University wrote “The Fair Market Value-Fair Value Dichotomy: Valuation Discounts in Recent Shareholder Dissent Cases” for *The Value Examiner*, a publication of the National Association of Certified Valuators and Analysts (NACVA). Read the article at www.ctcpas.org/FairMarketValue.

McGowan Pro Risk Management Director **John Raspante** was featured in the *Accounting Today* podcast “Emerging risks for accountants.” The episode focused on new areas that are sparking claims against firms – and the tools they can use to protect themselves.



Jack Kneisel

CironeFriedberg, LLP welcomed **Jack Kneisel** as Audit Manager. He will provide audit and accounting services to clients in many industries. Jack brings eight years of audit and accounting experience with a specialization in commercial real estate.

Trinity Health of New England Recognizes David Goldfarb for Help in Furthering Mission



CTCPA member **David Goldfarb** has been a volunteer at Saint Francis Hospital, part of Trinity Health of New England, for more than 10 years. David is one of the hospital’s volunteer patient care representatives, visiting with patients on a cardiac unit. He seeks to ensure patients are satisfied with the care they are receiving during their stay at Saint Francis.

“I want to make sure that the patients I visit are having as good a day as possible,” said David. “During the early times of the pandemic, when volunteers were not allowed in the hospital, I missed this work so much and

I was so happy when I was finally able to return. I like meeting the patients. If I can make a patient feel a little better, it makes me feel good.”

David was recently recognized by Saint Francis Hospital for the work that he does. “David embodies our Core Value of Reverence. We honor the sacredness and dignity of every person,” explained **Gerald Galipeau**, Executive Director of Mission Integration. “We thank him for his volunteer work and all the good he does for our patients and colleagues!”

CTCPA Day of Giving Supports Connecticut Foodshare, Connecticut Children's Medical Center

Thank you to everyone who supported our third annual CTCPA Day of Giving! We collected more than a thousand pounds of food for Connecticut Foodshare and hundreds of toys and art supplies for Connecticut Children's Medical Center, plus almost \$4,000 in donations to benefit those organizations. We also had a wonderful time catching up and meeting new people in the process!

>> Visit www.ctcpas.org/DayofGiving to see the photos and coverage from WFSB Channel 3.



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Mergers/Acquisitions

Practices for Sale (Accounting Practice Sales) – Gross revenues shown: Danbury area \$310K; Tolland County \$315K; Washington County, RI \$360K (motivated seller). For more info on these opportunities or to sell your practice, contact Lori Newcomer, CPA and Tim Price, CPA at 888-553-1040 or PNgroup@APS.net, or visit www.APS.net.

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

Help Wanted

Full-time Certified Public Accountant – Local CPA firm in Danbury, CT. Well-established CPA firm in Danbury, CT looking for a team member to join us for an in-office position while we move to the next level. Opportunity unlimited for right person. 35-hour work week – overtime during tax season is voluntary. Salary range: \$96,200 - \$104,000. Job requirements: Current CPA license, 3-5 years public accounting; Comprehensive tax knowledge of federal, state and local taxes; Experience in financial statement reviews and compilations; Proficient in ProSystems FX. Contact: Anthony Mercaldo, Mittler Mercaldo & Braun PC. Email: TONY@MMBCPAPC.COM, Phone: 203-792-3190.

>> Place a classified ad at www.ctcpas.org/Classifieds

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Place your ad on www.ctcpas.org, in *Connecticut CPA* magazine, or both.

Thank You, 2023-2024 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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