

Fall 2025

# Connecticut CPA

Advocacy. Community. Education.

A publication of the Connecticut Society of Certified Public Accountants



## The ASL CPA

CTCPA member Jon Sahlin has built a unique career that combines his expertise as a CPA with a commitment to the Deaf community. From providing financial guidance in American Sign Language (ASL) to creating events and programs that empower deaf individuals, Jon embodies how a CPA career can combine professional expertise with personal purpose. *page 12*





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# CTCPA Women's Awards

*Celebrating Connecticut's exceptional female finance professionals*

**Tuesday, January 20 • TPC River Highlands, Cromwell • 7:30am - 10:30am**

Join us for an inspiring networking event as we celebrate  
outstanding females making their mark on the accounting profession,  
their companies, and their communities.

Attend or sponsor the event: [www.ctcpas.org/CTCPAWomen](http://www.ctcpas.org/CTCPAWomen).

# Connecticut CPA

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## From the Executive Director and CEO



## The Connecticut Professionals' Leadership Academy: Investing in Leaders Who Will Shape the Future

Every great organization is built on the strength of its people. As professionals, we face not only today's challenges but also the responsibility to nurture the talent that will guide us into the future. That's why the Connecticut Professionals' Leadership Academy is such a transformative opportunity – and why I'm so passionate about it.

This six-month program is not just another professional development course. It's a launchpad for ambitious professionals ready to elevate their leadership, expand their horizons, and make a lasting impact. Participants step out of their daily routines and into an environment designed to spark growth, innovation, and collaboration. They sharpen the skills that define exceptional leaders, gain fresh perspectives, and form lasting connections with peers across industries.

What makes this program unique is its focus on collaboration. By uniting emerging leaders from diverse fields, including law, finance, architecture, insurance, and accounting, the Academy fosters an energetic environment where ideas flourish and new opportunities emerge. Participants leave not only with enhanced leadership skills but also with the confidence and purpose to make meaningful changes in their organizations and communities.

For employers, the return on investment is extraordinary. Your team members will return energized, equipped with innovative strategies, and prepared to assume leadership roles that help your organization thrive in a constantly evolving world. Deloitte Hartford Managing Partner **Rich Tavolieri** has seen this impact firsthand, calling the program "transformative" for its ability to broaden perspectives and invigorate participants.

If you're a professional eager to grow, don't wait for someone to tap you on the shoulder. Take the initiative – bring this program to your supervisor and start the conversation. If you're an employer, identify your most promising team members and give them this opportunity to shine.

Applications are open now through November 30. Don't miss this chance to invest in your future leaders – and in the future of your organization.

Learn more and apply at [www.ctcpas.org/LeadershipAcademy](http://www.ctcpas.org/LeadershipAcademy). Together, let's shape the leaders who will define tomorrow.

Bonnie Stewart, Executive Director & CEO





# Connecticut Professionals' Leadership Academy

Apply online at [www.ctcpas.org/LeadershipAcademy](http://www.ctcpas.org/LeadershipAcademy).

*Presented in partnership by:*



## A Landmark Program for Tomorrow's Leaders

The Connecticut Professionals' Leadership Academy is a dynamic, cross-industry program designed to shape the next generation of bold, innovative leaders.

Bringing together high-performing professionals from the fields of architecture, finance and investment, law, accounting, and insurance, the Academy cultivates leadership skills, inspires fresh ideas, and builds powerful cross-profession connections.

Over six months, participants come together one day each month for immersive, high-impact sessions that elevate their leadership, fuel professional growth, and inspire them to drive meaningful change.



### Program Snapshot

**Duration:** 6 months | 1 day/month

**Cost:** \$600 tuition for all six sessions (includes 23 CPE credits)

**Format:** In-person workshops and networking

**Eligibility:** Early- to mid-career professionals who are members of the sponsoring associations

**Deadline:** Apply by November 30, 2025

### Endorsed by Employers



Take it from  
**Deloitte Hartford**  
Managing Partner  
Rich Tavolieri, CPA:

“From my personal experience, I have observed the transformative impact of the Academy on its participants. It not only enriches their perspectives but also broadens their outlook, making them well-rounded professionals. It has been clear that encountering a wide range of disciplines invigorates participants, instilling a sense of optimism and readiness to take on the multifaceted demands of their forthcoming roles.”





# Northeast Finance & Accounting Convention

## Foxwoods Resort Casino | November 3-4, 2025

Where Finance, Technology,  
& Leadership Converge



Join us for an immersive two-day experience exploring the future of innovation and growth. This one-of-a-kind event will bring together the Northeast's top CPAs and finance professionals for a dynamic program packed with cutting-edge insights, meaningful connections, and premium amenities – set at the iconic Foxwoods Resort Casino.

Bring your team to connect with peers and industry leaders through curated networking events, social gatherings, and engaging general sessions on next-gen technology, the future of the profession, leadership, and more.

► Register at [www.ctcpas.org/Convention](http://www.ctcpas.org/Convention)

### Schedule

**Monday, Nov. 3** at 10:30 a.m. through  
**Tuesday, Nov. 4** at 3:30 p.m.

### CPE Credit

9 hours

### Hotel Information

**\$109** (plus taxes and fees) – Deluxe Room

**\$199** (plus taxes and fees) – Director's Suite

### Registration Fees

**\$209** Member Early

**\$334** Nonmember Early

**\$239** Member Standard

**\$364** Nonmember Standard

*Early registration applies through October 3.*

**\$100** VIP Upgrade Available

*Register five or more individuals from the same company and receive a \$50 discount off each registration. Please contact Lisa Bugryn at [lisab@ctcpas.org](mailto:lisab@ctcpas.org) or 860-258-0232 to receive this discount.*





# Hear from the Game Changers in Accounting and Tech



**Tom Hood, CPA, CITP, CGMA**  
EVP, Business Growth & Engagement for AICPA-CIMA and the Business Learning Institute

## **The Future of the Profession in 2025 – Everything, Everywhere, All at Once**

Tom recently stepped onto the global stage of the largest association of certified professional accountants in the world, representing over 690,000 CPAs, CGMAs, and students. He was named in the top three most influential people in accounting by *Accounting Today* for the 11th year.



**Ryan McManus**  
Founder of techtonic.io; Executive Professor of AI, Brown University; Advisor, Board Director

## **The AI-Powered Economy – What Wins and What's Next for Strategy, Risk, and Finance**

The founder of techtonic.io, Ryan McManus advises Fortune 500 companies, governments, startups, and private equity investors on AI and other emerging technologies, digital transformation, business model strategy and generating speed within their organizations.



**Amy Vetter**  
Keynote Speaker, CPA, Yogi, and CEO of The B<sup>3</sup> Method Institute

## **The Fulfillment ROI – The Missing Metric for Creating High Performance Cultures**

What happens when you blend the precision of a CPA, the mindfulness of a Yogi, and the innovation of a business leader? You get Amy Vetter – a dynamic keynote speaker who demonstrates how individual well-being directly translates to improved business results.

**Breakout session tracks will focus on technology and innovation, corporate finance, and technical mastery and regulatory updates.**

**FASB Update:  
What's Changing and How to Prepare**

**Reimagining Finance Through  
Data and Automation**

**Tax Reform: State, Federal,  
and Global Trends**

**The Changing Role of the CFO  
in the Era of AI – Panel**

**Cybersecurity and Data Privacy  
for Financial Professionals**

**Future-Proof Finance: Scenario Planning  
Meets Data-Driven Decision Making**

**Lease Accounting Update:  
What You Need to Know Now**

**Leading Finance Teams Through  
Disruption and Change**

**The Future of Audit:  
Leveraging Data Analytics and Automation**

**How We're Using AI Now: Real Stories from  
Accounting Firms and Finance Teams**

**From Pain Points to Productivity:  
Modernizing Your Tech Stack Step by Step**

**Artificial Intelligence in Finance:  
Opportunities, Risks & Real-World Impact**



# Major Changes to Connecticut's CPA Pathways and Mobility Laws Effective October 1

## State Board of Accountancy Working to Provide Guidance, Statutory and Regulatory Review

On October 1, 2025, major updates to modernize our state's CPA licensure and mobility laws took effect. These changes reflect our ongoing efforts to strengthen the CPA pipeline by aligning state laws with the evolving professional landscape and introducing three distinct pathways to licensure.

Nationwide, more than 30 states are pursuing similar efforts.

With the support of the Connecticut State Board of Accountancy, we advocated for Connecticut to adopt expanded pathways to CPA licensure. We also pursued an automatic or enhanced mobility model to grant CPAs licensed in other states the privilege to practice here without administrative hurdles.

Our proposals were included in HB 7020, An Act Concerning Certified Public Accountants – which was signed into law by Governor Ned Lamont on June 10.

At press time the State Board of Accountancy was working on implementation guidance for the new laws and also conducting a comprehensive review of Connecticut's CPA statutes and regulations to identify areas that require modernization.

### New CPA Licensure Pathways

Connecticut will soon join many other states in offering 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.

**Pathway 1:** Post-baccalaureate degree, passage of the CPA Exam, and one year of general experience.

**Pathway 2:** Bachelor's degree plus 30 credit hours, passage of the CPA Exam, and one year of general experience.

**Pathway 3:** Bachelor's degree, passage of the CPA Exam, and two years of general experience.

As far as education, each of the pathways require either an accounting degree or a non-accounting degree plus accounting-related courses.

Accounting degree is defined as a degree that includes "accounting" in the title or a business degree with a concentration in accounting, such as accounting minor, accounting emphasis, or accounting concentration. This degree-centered approach simplifies the educational requirements, helping reduce administrative burdens on candidates and regulatory bodies.

Key benefits include:

- **Addresses 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.

With new CPA licensure pathways rolling out across the country, states are working through key implementation issues – specifically, if the educational requirement credit breakdown is still relevant.

The Connecticut State Board of Accountancy continues to discuss how to best address these questions; a pulse survey conducted by the board garnered responses from 28 other states who are currently engaged in similar conversations. At their September 2 meeting, the board planned to call a special meeting to discuss potential regulatory changes.

The CTCPA has reached out to our educators to solicit feedback, as well, and will continue to work toward the best possible solution for the profession and the CPA pipeline.

### Automatic/Enhanced Mobility

The automatic or enhanced mobility in the bill grants CPAs who 1) are CPAs in good standing in another state and 2) achieved their license via an accepted Connecticut CPA licensure pathway the privilege to practice here without administrative hurdles. Key benefits include:



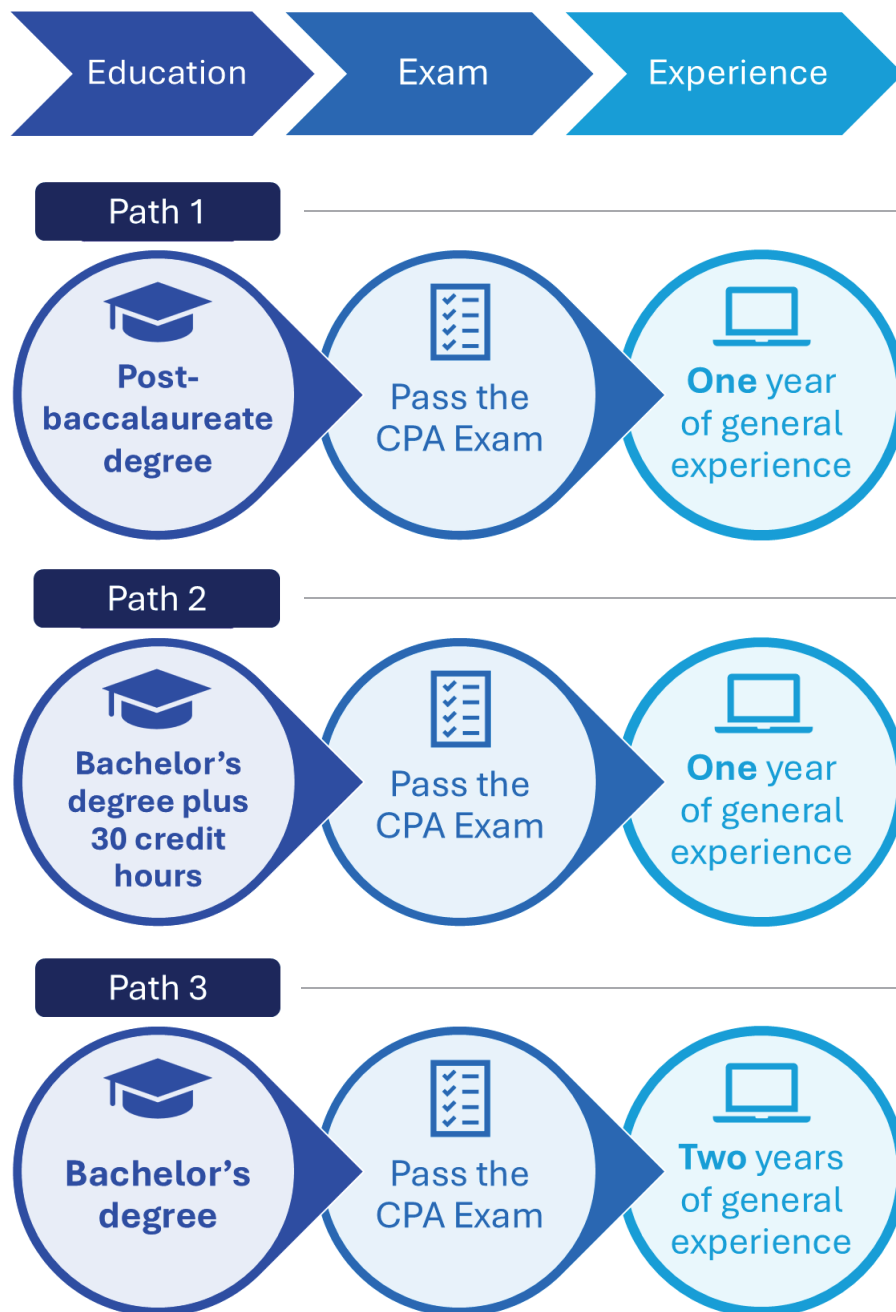
- **Minimizing Disruptions as Multiple States Broaden CPA Licensure Pathways:** As states across the country transition to alternative pathways to CPA licensure like those proposed in Connecticut, enhanced mobility helps minimize disruptions for CPAs and CPA candidates.

- **Working Toward State-to-State Consistency and Access:** With automatic mobility already implemented in six states and 30 more working toward 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.

- **Maintaining 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.

## Pathways for Connecticut CPA Licensure



Get the latest updates at [www.ctcpas.org/MobilityandPathways](http://www.ctcpas.org/MobilityandPathways).

# Accounting Scholarship Foundation Champions Aspiring CPA's Goals – for the Third Time

By Caitlin Q. Bailey O'Neill – Connecticut CPA Assistant Editor



Juliana Sarbieski (center) accepts the \$5,000 150-Hour Education Scholarship from Accounting Scholarship Foundation Trustee Caitlin Nero of Whittlesey and Chair Stefan Prins of PKF O'Connor Davies.

Juliana Sarbieski was a student at Naugatuck High School when she first dipped a toe into accounting.

"I quickly discovered that accounting wasn't just about numbers on a page – it felt like a language that made sense to me," she wrote on a scholarship application this year. "The more I learned, the more I found myself drawn to its logical structure and how it could influence decisions."

It was June of 2022 when Juliana, then a high school senior, attended her first CTCPA event. She left the Recognition Reception that evening with a \$500 High School Accounting Scholarship.

That scholarship was the first of three awarded to her by the Accounting Scholarship Foundation; in 2024, Julianna took home the \$5,000 4-Year College Accounting Scholarship and in 2025, the \$5,000 150-Hour Education Scholarship.

(If you're doing the math, that's \$10,500 the Accounting Scholarship Foundation trustees awarded toward her academic quest for the CPA.)

After graduating from Quinnipiac University with a degree in Accounting/Computer Information Systems in May 2025, Juliana is now pursuing her Masters of Science in Business Analytics at the same school. By spring of 2026, she expects to begin sitting for the CPA Exam.

During school, Juliana completed two busy season internships at CBIZ and spent the past summer as an intern at the same firm.



## Aspiring CPA Q&A

We sat down with Juliana at her third(!) Recognition Reception in June 2025 to discuss her journey and surprise her with one more award: a full CPA Exam Review course donated by **UWorld Roger CPA Review**.

**Connecticut CPA: Why did you decide to pursue a career in accounting?**

**Juliana:** I decided on a career in accounting during high school when I had some introductory courses, because I liked how organized it was. It was pretty much a controlled environment that I was drawn to.

**Connecticut CPA: What do you hope to do in accounting?**

**Juliana:** I hope to help people. I hope to help people who need aid with their taxes and their financial information, or just help the industry. At Quinnipiac, we have a VITA [Volunteer Income Tax Assistance] program where we do taxes for people in Hamden. I was in that program this past spring semester, and it was really inspiring just to help the community with volunteer hours. You can tell how grateful they were. It was a really good experience, and it really opened my eyes to what a CPA means and what it is.

**Connecticut CPA: Why did you decide that getting the CPA credential was important to you?**

**Juliana:** The CPA is important to me because I like how it impacts the security of financial data in the industry, and I like the standards and stability that the CPA stands for.

**Connecticut CPA: You've now received three scholarships from the CTCPA's Accounting Scholarship Foundation. What have these awards meant to you as you've pursued your career?**

**Juliana:** As I've been going through my education, getting these scholarships has been extremely amazing. It's just great to be recognized for hard work and consistently striving for the next goal, and it's very motivating to be recognized for that.

**Connecticut CPA: What advice would you give to high school students (and even younger!) about pursuing accounting as a career?**

**Juliana:** Some advice I would give to students would be just to be confident in yourself, always strive for excellence in what you do, and always work on your communication skills. If you do those three things, it'll take you very far and help you succeed in accounting and any field.





## Support the Next Generation with Individual or Firm/Company Support of the Accounting Scholarship Foundation

The CTCPA Accounting Scholarship Foundation awards more than \$50,000 in scholarships annually, financed by the annual golf tournament, individual donations as part of the membership renewal process, and by firm and company support; donations are also gratefully accepted online at [www.ctcpas.org/ASF](http://www.ctcpas.org/ASF) throughout the year.

If you'd like to discuss how your organization can help make a difference, please reach out to Cindy Panioto at [cindyp@ctcpas.org](mailto:cindyp@ctcpas.org) or 860-258-0213.

## Undergraduate Accounting Enrollment Rises for Three Consecutive Semesters

New estimated data from the National Student Clearinghouse Research Center shows a 12% increase in spring 2025 undergraduate accounting enrollment compared to the prior year. The increase amounted to an additional 29,312 students.

Total undergraduate accounting enrollment for spring 2025 was 266,507 students. This marked the third consecutive semester of growth in accounting enrollment across undergraduate institutions of all types. Accounting enrollment at two-year institutions rose 24% to 77,936 students, and four-year institutions saw an 11% increase in accounting enrollment, for a total of 188,571 students.

A student pulse survey conducted by AICPA in partnership with the Future Accountants Sponsoring Organizations (FASO) in April explored factors influencing student decisions. The survey showed:

- **Decision to Major in Accounting:** 46% of students decided to major in accounting after taking an accounting-related course, while 39% chose it before entering college.
- **Influencing Factors:** The top reasons for choosing accounting included increased job demand (66%), earning potential (56%), and economic conditions (48%).
- **Professional Events Attendance:** Around 80% of students attended events featuring accounting professionals, with 62% stating these events strongly or somewhat influenced their major choice.
- **Consideration of Other Majors:** 67% of respondents either strongly considered other majors or switched to accounting from another field, with finance being the most common alternative.
- **Awareness of Job Demand:** 56% of students were aware of the growing demand for accountants, which influenced their decision to major in accounting.



## CTCPA Pipeline Programs: Volunteer to Help

Many programs are underway within the accounting profession to build the future workforce including initiatives by CPA firms, the AICPA, NASBA, state societies, colleges, state boards of accountancy, and others to provide greater support for candidates taking the CPA Exam.

The CTCPA Pipeline Task Force is actively working to mobilize our membership to share why they chose the profession, cultivate student interest in majoring in accounting, and support future Connecticut CPAs throughout their career path.

CTCPA initiatives include:

- Accounting Is My Major (AIM) high school programs at Connecticut colleges
- Accounting Scholarship Foundation awards and grants for accounting majors
- Promotion of the profession at college career fairs
- Classroom visits for the nationwide Accounting Opportunities Experience
- CPA Exam review course discounts and personalized help on the path to CPA

**Learn more about the CTCPA Pipeline Task Force and meet its members at [www.ctcpas.org/AccountingOpportunities](http://www.ctcpas.org/AccountingOpportunities).**



## Help us Power the Pipeline!

If you're interested in helping with our student outreach initiatives, please reach out to **April DiFalco** at 860-258-0212 or [aprilid@ctcpas.org](mailto:aprilid@ctcpas.org).

We're particularly in need of Accounting Careers Speakers Bureau members to visit high school and college classrooms, attend career days and fairs, and help us pursue interactive outreach avenues.



# The ASL CPA

## How Jon Sahlin Built a Practice – and a Platform – for the Deaf Community

By Caitlin Q. Bailey O'Neill – Connecticut CPA Assistant Editor

**J**on Sahlin's path to the CPA is a familiar tune for so many CTCPA members.

"My dad was in accounting," Jon remembers. "I grew up hearing about how accounting was the backbone of business."

But respect for accounting wasn't the only part of his childhood that helped shape his future career. Jon is a CODA—a Child of Deaf Adults.

"That's how I've been blessed with this skill, sign language, and also to be a part of a real community, the Deaf community," he explains.

As the license plate on his car proudly proclaims, Jon Sahlin is the "ASL CPA."

### Learning the Language

With both of his profoundly deaf parents communicating solely through American Sign Language (ASL), MTV became the mechanism by which Jon learned both music and speech. With MTV in its heyday, Jon found himself drawn to the 90s rock bands like Nirvana and Pearl Jam. This, of course, led to the all-American teen guy hobby: starting a band with his friends.

Jon laughs as he remembers his bandmates coming over to practice. They'd set up a drum set and amps in the living room and jam in the way that rock music required ... while his mother sat on the couch watching TV, completely oblivious to the cacophony around her.

Like so many moms, she'd tag along to his concerts to support him. She'd sign to her hearing friends – "Is he any good?"

In 2022 or 2023, after roughly 15 years of playing in cover bands, Jon was at a Deaf night out watching a friend's band when inspiration struck.

"I asked, 'Hey guys, you mind if I jump up there for a couple songs? I'm going to try singing and signing them at the same time.'" He did just that, working out the signs off the cuff as the music played.

Jon was so inspired by the outpouring of gratitude and love in response to that performance that he decided to start a band specifically dedicated to performing in a way that both deaf and hearing audiences could appreciate.

A Craigslist ad looking for deaf bandmates came up empty, so Jon pulled together some hearing friends and hit the ground running.

Blast Time was born – a band fronted by Jon both signing and singing. To his knowledge, they are one of only two bands in the country performing this way.

"[My bandmates] love it!" he laughed. "They love the idea, the concert – it's a big 'feel-good' thing for them. They love being able to come out and provide this kind of opportunity to the Deaf community."

While the band was getting started, Jon was also working on another passion project: "ASLpalooza." The one-day festival launched in 2023 with approximately 225 people; the following year, the crowd grew to 400. Jon is working hard on 2025, scheduled for November 1, 2025 at The Truck Bar in Berlin.

"It's my band performing, but I hire other performers that are deaf to try to give support to the Deaf," he explained. "I am very passionate about giving back to the Deaf community."



Jon sings and signs with his band Blast Time at ASLpalooza.



Last year's show, we gave 10% of our proceeds to a Deaf nonprofit. We also hired, whenever possible, Deaf-owned businesses."

He's recently trademarked the term ASLpalooza and lights up when he dreams about the future and the potential for events in other states and regions with a large Deaf population.

The band has gained traction and opportunities, ranging from the three-day "DeafStock" festival in Florida to shows at the American School for the Deaf. It's the reaction from his audience that makes it all worthwhile; Jon remembers one Halloween show at the school when he brought a child up onstage, and the child started signing along.

"It was just beautiful," he remembered. "Those are the things that just hit home and highlight this kind of project."

Jon's connection to the American School for the Deaf recently led to a spot on The CRIDDERS, a sign language performance troupe that began at the school in 1982 and aims to "bridge the gap between two distinct and unique worlds: one filled with sound, one rich with silence." Jon is just the 'Baby CRIDDER,' he laughs, joining the group well into their history. The group meets on Sundays to practice their variety show of signed music, comedic sketches, and more.

### Turning Signing into a Business

From band practice to performing with the CRIDDERS to taking on side gigs as a certified ASL interpreter (he may, for example, accompany a deaf individual to a doctor's appointment to ensure the patient is understood and understands), it seems to leave few hours in the day for "business." Just a few years into his tenure as a business owner, Jon Sahlin, CPA is exactly where he wants to be.

"I own my own practice," he explains. "I do a lot of taxes. I have bookkeep-



*Jon meets with client Alexandra McGee at his office in Bristol.*

ing clients and stuff like that, but the nice thing about my 'busy time' is that it provides a good amount of my income throughout the year, but then I have the offseason that allows me to pursue these passions a bit more."

For more than 10 years, Jon worked in private industry but did taxes on the side ... Until the pandemic hit. Jon found himself furloughed and, without the safety net of a steady job and benefits, decided to take the plunge into life as a business owner. In the past five years, he's seen "exponential growth" – and a very personal niche.

"It's nice to be able to give back to the Deaf community," he said. "I will generally take any clients if they're deaf, because what's their other option? H&R Block with a piece of paper and a pencil? I want you to have the ability to have a tax preparer you can talk to and communicate with."

He estimates his practice is currently 50/50 deaf/hearing, with deaf individuals and Deaf-owned businesses becoming an increasingly larger segment.

"I can't tell you how many times I've had deaf clients who come to me for the first time and they're thrilled with me being able to kind of break things down," Jon marvels. "The difference between standard deductions, itemized deductions. We talk about everything from IRAs to high-yield savings accounts, just trying to make sure that everybody is fiscally educated when it comes to those kind of things." (And yes, there are ASL signs for many of those financial terms – the rest are finger-spelled!)

"It's been a wonderful experience," concurred Alexandra McGee, a deaf client of Jon's who happens to be a longtime family friend. "It's been a blessing. Jon can clearly articulate for us what's going on. We don't have to sit there and rely on writing everything down."

"This is obviously important stuff, so having a direct line of communication and clarity is extremely important, so thank God we have Jon," she signed. Alexandra is also the treasurer of the Connecticut Association of the Deaf, so Jon has also supported her with business filings and the 990.

Jon works with one full-time employee who's hearing and a few part-time tax preparers who happen to be deaf. He's currently looking for an ASL tax preparer or CPA to help finalize returns, as much of the final signature work falls onto Jon's shoulders.

*(continued)*



(continued)

"If I can give a job to a deaf person, you know, that's a huge thing for me," he said.

It isn't just giving back to the Deaf community that matters to Jon. He jokes that he took the long road to the CPA credential, starting off with an associate's degree from what was then Tunxis Community College before going to work and taking night classes for a bachelor's degree at Central Connecticut State University. He earned his master's degree from the University of Hartford before earning his CPA license in his mid-thirties.

"After I got my master's, I went back to the folks at Tunxis and I said hey, wouldn't it be a nice story if one of your former students came full circle and became a teacher here?" he remembers. There were no openings at the time, but two years later, they called to offer him a position teaching taxation.

For seven years now, Jon has added "teacher" to the many hats he wears, teaching both tax and intro to account-

ing courses at CT State Community College Tunxis. He brings his trademark creativity to the classroom, making the profession come alive for his students.

"You're not going to struggle finding work in accounting," he tells his students. "There's lots of opportunity for jobs. If you're crafty, you can do something like I do, where you can go into the tax world and have this intense portion of the year, but then you know that outside of that, it frees you up to do other things. It can be a way to provide you opportunity for passion projects."

It's passion projects that Jon has in spades. He has, after all, built an entire accounting firm, a rock band, and events around the language his parents taught him from birth.

"It's not all peaches and cream," he recognizes. "But I certainly can't complain. I've been very fortunate in many, many ways. I just continue to try to do the best I can and give back the best I can. And have as much fun as I can."



**Want to see  
Jon in action?**

**ASLpalooza 2025**

Saturday, November 1

The Truck Bar, Berlin

7:00 p.m.

A portion of proceeds benefits  
the DeafBlind Association  
of Connecticut and  
DeafBlind Support Access Network.

Get a link to event details at  
[www.ctcpas.org/ASLCPA](http://www.ctcpas.org/ASLCPA).

## Tell Us Your Unique Career Story – We'd Love to Feature You!

We know our members have stories worth sharing – maybe you serve a distinctive client niche, work in a surprising industry, or have taken a career path that's far from traditional. Whatever your journey, we want to hear about it!

To share your story, please reach out to *Connecticut CPA* Assistant Editor **Caitlin Bailey O'Neill** at [caitlinb@ctcpas.org](mailto:caitlinb@ctcpas.org).





# Meet Yolanda Durant, IRS Stakeholder Liaison



## Yolanda Durant

### IRS Senior Stakeholder Liaison

Cell: 914-879-3153

Office Hours: 6 a.m. - 2:30 p.m.

## There's a new IRS Senior Stakeholder Liaison in town! (Well, new to CTCPA members, anyway.)

**Yolanda Durant** has actually been with the Internal Revenue Service since 2012, with a resume that runs the gamut of responsibilities: Senior Individual Taxpayer Advisory Specialist, Tax Compliance Officer, Intake Advocate for the Taxpayer Advocate Department, Customer Service, and Collection Representative.

With the retirement of longtime Senior Stakeholder Liaison **Joe McCarthy**, Yolanda adds Connecticut to her territories of New York and Vermont.

In the stakeholder liaison role, Yolanda “builds and maintains beneficial relationships and facilitates communications and coordination efforts among public and private sector.” In short, Yolanda is here to help CTCPA members navigate complex issues, tax law, and more.

CTCPA members can contact her on her cell phone at 914-879-3153; her office hours are between 6 a.m. and 2:30 p.m.

Yolanda graduated with a bachelor's degree in accounting from York College of the CUNY before earning her MBA in e-business and technology from Columbia Southern University in 2011. She earned a Six Sigma Green Belt certification in 2012.

When she's not working, Yolanda enjoys arts and crafts.

## Open enrollment: Why benefits matter

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\*2025 Priorities for Business Leaders Survey Results, Paychex.



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# Member Meetings



Register and find more at [www.ctcpas.org/MemberMeetings](http://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.

**Friday, October 17**

**Wednesday, November 19**

**Wednesday, December 17**



## New and Young Professionals Cornhole and 'Corny' Trivia Tournament

**Thursday, October 23 • 5:30-7:30 p.m.**

Location TBD • Members: \$30 Nonmembers: \$40

Warm up your pitching arm and get ready for a laugh or two. Not a fan of cornhole? Join in on the fun of our "corny" trivia. Includes drink and raffle ticket and food.



## TechConneCT Roundtables

9:00-10:30 a.m. • Online

Connect with members of the CTCPA Technology Group for an exchange of ideas, best practices, and practical applications.

### Open Discussion

**Thursday, November 13**

### Tips and Tricks to Tax Season IT

**Thursday, February 12**

### The Good, the Bad, and the Ugly of Tax Season

**Thursday, May 14**



## State Tax Group Meeting

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

**Wednesday, October 22 • 8:30am - 9:30am • Online**



## Employee Benefit Plans Group Meeting

Friendly, interactive meetings include roundtable discussion of changes affecting plans, auditors, and employers.

**Wednesday, December 10 • 3:00-4:00 p.m. • In-Person**

**Thursday, January 22 • 9:00-10:00 a.m. • Online**

**Wednesday, April 29 • 9:00-10:00 a.m. • Online**



## Member Appreciation Day

**Tuesday, January 27 • 9:00 a.m. - 4:30 p.m. • Online**  
CPE: 6 hours

We're excited to introduce our first Member Appreciation Day! Join us for this virtual event designed to say thank you with six hours of free CPE on today's most relevant topics.



## Financial Institutions Group Meeting

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

**Thursday, October 23 • 9:00-10:30 a.m. • Online**



## Accounting, Auditing, Financial Reporting Group Meeting

Discuss exposure drafts and enhance relationships with standard-setters.

**Tuesday, November 18 • 9:00-10:30 a.m. • Online**



## Governmental Accounting & Auditing Group Meeting

Discuss developments, regulations, and compliance issues with public sector and public accounting professionals.

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

**Tuesday, April 21 • 9:00-10:00 a.m. • Online**



## Not-for-Profit Organizations Group Meeting

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

**Thursday, November 6 • 9:00-11:00 a.m. • Online**

**Thursday, May 21 • 9:00-11:00 a.m. • Online**

# **CTCPA** Groups and Committees

## Special Interest Groups

Join groups and find upcoming meetings at [www.ctcpas.org/Groups](http://www.ctcpas.org/Groups).

Connect with colleagues, subject matter experts, regulators, legislators, and more. Whether you're a seasoned professional looking to give back or a young professional just discovering your path, every member is welcome to join these special interest groups.



### Accounting, Auditing, Financial Reporting Group

Discuss exposure drafts and enhance relationships with standard-setters.

Contact: Cindy Panioto • [cindyp@ctcpas.org](mailto: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](mailto:lisab@ctcpas.org)



### Chief Financial Officers Group (Exploratory)

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

Contact: April DiFalco • [april@ctcpas.org](mailto:april@ctcpas.org)



### Educators Group

Discuss hot topics in this candid, conversational group.

Contact: April DiFalco • [april@ctcpas.org](mailto:april@ctcpas.org)



### Employee Benefit Plans Group

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

Contact: Lisa Bugryn • [lisab@ctcpas.org](mailto:lisab@ctcpas.org)



### Federal Taxation Group

Discuss issues and build relationships with legislators and regulators.

Contact: Cindy Panioto • [cindyp@ctcpas.org](mailto:cindyp@ctcpas.org)



### Financial Institutions Group

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

Contact: April DiFalco • [april@ctcpas.org](mailto:april@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](mailto:cindyp@ctcpas.org)



### Golf Group

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

Contact: Cindy Panioto • [cindyp@ctcpas.org](mailto:cindyp@ctcpas.org)



### Governmental Accounting & Auditing Group

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

Contact: Lisa Bugryn • [lisab@ctcpas.org](mailto: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](mailto: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](mailto:lisab@ctcpas.org)



### Pipeline Task Force

Work with subcommittees to inspire students, promote accounting, and support future Connecticut CPAs.

Contact: April DiFalco • [april@ctcpas.org](mailto:april@ctcpas.org)



### State Taxation Group

Navigate the regulatory and legislative aspects of Connecticut tax compliance.

Contact: April DiFalco • [april@ctcpas.org](mailto:april@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](mailto:cindyp@ctcpas.org)



### Trust, Estate, and Gift Taxation Group

Discuss taxation, trusts, gifting strategies, and more.

Contact: Cindy Panioto • [cindyp@ctcpas.org](mailto:cindyp@ctcpas.org)

## Leadership Committees

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



### Membership Committee

Assist with member recruitment and evaluating benefits to increase engagement and the member experience.

Contact: Cindy Panioto • [cindyp@ctcpas.org](mailto:cindyp@ctcpas.org)



### New & Young Professionals Cabinet

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

Contact: April DiFalco • [april@ctcpas.org](mailto:april@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](mailto:lynettel@ctcpas.org)



### Investment Committee

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

Contact: Bonnie Stewart • [bonnies@ctcpas.org](mailto:bonnies@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](mailto: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](mailto: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](mailto: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](mailto:bonnies@ctcpas.org)



# The New AICPA Quality Management Standards Take Effect December 15, 2025: Make Sure Your Firm is Ready

By Duncan B. Will, CPA/ABV/CFF, CFE – Loss Prevention Director and Accounting and Auditing Specialist, CAMICO

The AICPA's Statements on Quality Management Standards' (SQMS) December 15, 2025 effective date is fast approaching, and few firms are prepared.

Since the SQMS were issued in June 2022, the AICPA has produced a plethora of related content. This article is not intended as a treatise on the SQMS. Instead, this article is an extremely brief overview of the SQMS, and shares risk management tips intended to motivate you to make progress on modifying your firm's system of quality management to be compliant with the SQMS.

## Overview

The SQMS represent a significant overhaul of the quality control framework for CPA firms, shifting from a rules-based to a risk-based quality management-framework. These standards are designed to ensure that firms establish, implement, and maintain effective systems of quality management tailored to their unique circumstances and engagements.

The items listed are components of the new SQMS, initially introduced when the International Auditing and Assurance Standards Board rolled out their quality management standards. Three components are elements of the extant quality control standards (QCS), three are renamed and expanded/updated elements of the (soon to be replaced) QCS, and the new components are the two COSO components not addressed in the extant QCS.

You are not required to implement the standards before December 15, 2025, but all standards applicable to your firm must be implemented by that

date. Firms performing services in accordance with Statements on Auditing Standards, Statements on Standards for Accounting and Review Services, or Statements on Standards for Attestation Engagements must design and implement their systems of quality management in compliance with the SQMS and should already have begun this process.

The initial evaluation of your firm's designed system of quality management is to be performed during the year ending December 15, 2026, and annually thereafter, to assess whether your system of quality management meets its quality objectives.

## Risk Management Tips

The clock is ticking and December 15, 2025 is fast approaching, so although not meant to be all-inclusive, do consider the following risk management tips and best practices:

- Don't let "perfect be the enemy of good." If unchecked, this aphorism can create crippling inertia in the development of your quality management process. Understand that a system of quality management is an evolving, iterative, dynamic process. Learn from the process, share information with your team, and use that information to improve your system of quality management.
- Seek your peer reviewer's guidance with the transition. Your peer reviewer's familiarity with your quality control system and understanding of the new standards can be instrumental in assisting you with designing your system of quality management. Ask what tools your peer reviewer be-

lieves would be beneficial for you. Ideally, you can obtain your peer reviewer's insight and tips specific to your unique needs.

However, be cautious not to rely too heavily on your peer reviewer (unless you are willing to secure the services of another), as doing so could threaten your peer reviewer's independence.

- Consider having a senior member of your system of quality management development team lead your firm's brainstorming sessions and adopt a two-phased approach to brainstorming. During the initial phase, the discussion leader should encourage and reinforce that this phase is exclusively for the generation of ideas, and that there be no evaluation or criticism of ideas raised. Care should be taken to record every suggestion.

Only during the second phase should the team evaluate or constructively critique aspects of the initial brainstorming phase. This two-phase approach will encourage team members to offer a greater number of suggestions as well as more-nuanced suggestions, which might otherwise not be captured and considered in the development of your system of quality management.

- Consider supplementing your external resources by collaborating with other practitioners with similar practices.
- Don't overcomplicate your transition process or try to address every potential risk. Instead, focus on the quality risks that are material, relevant, or of higher risk to your firm; the

Get more details and resources at [www.ctcpas.org/QualityManagement](http://www.ctcpas.org/QualityManagement).



types of industries, businesses, and organizations you serve; and the services you offer.

- SQMS No. 1 indicates that root cause analyses should be performed by people responsible for the firm's system of quality management. But to maintain objectivity, you should take care to avoid assigning individuals to perform root cause analyses that are on engagements being reviewed.

Root cause analysis can be extremely complicated, but don't get lost. Keep it as simple as possible. Now may be a good time to reacquaint yourself with or to discover the "Five Whys Technique," which involves repeatedly asking "why" to identify a problem's root cause. The technique can help you and your firm evaluate and avoid overlooking the root causes of identified deficiencies in your firm's system of quality management.

- As with the extant quality control standards, the SQMS require you to document your system of quality management. As before, that documentation may be used by your peer reviewer to assess whether your firm has complied with the standards. If documentation indicates your firm will perform procedures exceeding those required by professional standards, those elevated requirements will be the benchmark used to assess your compliance.

So, take care in documenting your firm's quality objectives, quality risks, your responses to those risks, and ultimately your system of quality management, taking care to identify those responsible and accountable for your system.

- Firms encountering challenges with the transition should consider seeking external support. Firms may benefit from engaging entities that specialize in offering tailored assistance with the implementation of the quality management standards.

*Duncan Will, CPA/ABV/CFF, CFE, is a Loss Prevention Director and Accounting and Auditing Specialist with CAMICO. He advises policyholders through the CAMICO Loss Prevention hotline and speaks to CPA groups on a wide range of topics.*

## Peer Review Perspective on the New Quality Management Standards: What Firms Need to Know

Firms that offer audit and accounting services must establish and document a system of quality management when the new standards take effect on December 15, 2025. This requirement is not satisfied with a quality control document that was put in place prior to a firm's implementation of the new quality management standards.

Firms whose peer review year ends after the December 15 deadline – many reviews are to be performed starting in 2026 – will have their systems reviewed under the new quality management standards. Firms that fail to comply may not pass their peer review.

**Firms subject to an engagement review:** Firms conducting only engagements under Statements on Standards for Accounting and Review Services (SSARS) or Statements on Standards for Attestation Engagements (SSAEs) other than examinations will not be subject to an assessment of their quality control document as part of the peer review process. However, AICPA membership includes a requirement to have a quality management document for firms with an A&A practice. Additionally, SSARS and SSAE require firms to have a system of quality management. Therefore, firms must conform to the new standards, which include a requirement to assess risks and document policies related to quality management.

**Firms subject to a system review:** Those firms that perform audits or examinations under the Statements on Standards for Attestation Engagements (SSAEs) will be required to have a system of quality management in place for peer reviews with a year end after December 15, 2025. Their peer review will include an assessment of their quality management document.

Your quality management document, along with other information, should cover the following areas:

- Risk assessment process
- Governance and leadership
- Relevant ethical requirements
- Acceptance and continuance of client relationships and specific engagements
- Engagement performance
- Resources
- Information and communication
- Monitoring and remediation processes

### Take Action: Conduct a Risk Assessment

The CTCPA Peer Review Committee strongly advises firms to complete an initial risk assessment as soon as possible. Firms may want or need to revise their initial quality management document. The standard emphasizes continuous evaluation and improvement, allowing for refinements over time. Changes in a firm's quality objectives or risks should be incorporated into the system of quality management on a timely basis when identified.

Have questions about your peer review or the new standards? Please visit [www.ctcpas.org/QualityManagement](http://www.ctcpas.org/QualityManagement) or contact Peer Review Administrator **Lynette Lindner** at [lynettel@ctcpas.org](mailto:lynettel@ctcpas.org) or 860-259-1062.



# Decoding the Modern CISO Role: From Defender to Strategic Partner

*By Sean Cleary – Partner & Cybersecurity Practice Lead, Riviera Partners*

As cybersecurity threats grow in both scope and sophistication, the role of the CISO is shifting to meet the demands of a changing business landscape.

The Chief Information Security Officer (CISO) role has arguably become one of the most rapidly evolving positions in tech. What was once a straightforward responsibility for managing risk and compliance is now a strategic leadership position that influences business growth, innovation, and organizational resilience. As cybersecurity threats grow in both scope and sophistication, the role of the CISO is shifting to meet the demands of a changing business landscape.

This shift is why hiring cybersecurity leaders who can navigate both techni-

cal challenges and strategic business needs is more critical than ever.

## Why the CISO's Role Is Changing

A few years ago, a CISO's primary responsibility was clear: Defend the organization from cyber threats. Today, the role has expanded significantly. The modern CISO sits at the intersection of technology, business strategy, and risk management, often reporting directly to the CEO or board and collaborating with other C-suite executives, including the CFO, CIO, and CTO.

Several key factors have driven this change:

- **Evolving cyber threats:** Cyberattacks are becoming more frequent and sophisticated, requiring proactive leadership that anticipates threats before they materialize.
- **Regulatory demands:** As data privacy laws become stricter, CISOs must ensure compliance while keeping operational flexibility.

- **Business continuity:** Cybersecurity is now directly tied to business continuity – a security breach can severely damage revenue, reputation, and customer trust.

- **Globalization and digital transformation:** As companies expand internationally and embrace new technologies like AI, the role of the CISO becomes even more complex.

This evolution has made the CISO's role more integrated with business strategy, emphasizing the need for leaders who can think beyond risk management and work closely with the C-suite to align cybersecurity strategies with the company's growth goals.

## What Makes a Modern CISO?

Today's CISO needs to possess a wide array of skills – strategic vision, cross-functional leadership, and the ability to manage complexity – to successfully guide their organization through an increasingly uncertain landscape. Modern CISOs must not only manage cyber

The modern CISO sits at the intersection of technology, business strategy, and risk management, often reporting directly to the CEO or board and collaborating with other C-suite executives, including the CFO, CIO, and CTO.



risks but also lead efforts that drive innovation and business transformation.

Take a recent CISO placement in the delivery industry at a fast-growing tech company. The CISO's primary responsibility was to manage the integration of an acquired company, handling both the technical and human elements of merging the cybersecurity teams. This role required strong communication skills to explain complex technical issues to a non-technical executive team and the ability to build a proactive security strategy that could scale with the company's global expansion.

The role required the CISO to work directly with the company's general counsel and board members to ensure the organization was prepared for any potential breach or security incident. They had to balance the technical aspects of cybersecurity with the business considerations of integrating a major acquisition.

This is the reality for modern CISOs: they must navigate both technical challenges and broader business objectives, leading teams through change and growth.

### The Key Skills and Traits of Today's CISO

Given this shift in responsibilities, the skills required for success have changed. Therefore, today's CISO must be able to:

- **Craft a strategic security vision:** The modern CISO must think beyond the day-to-day and provide a long-term vision for security that aligns with the company's business objectives and market evolution.
- **Lead cross-functional teams:** With cybersecurity no longer siloed in its own department, today's CISOs need to collaborate effectively with teams across the organization – product development, legal, compliance, and HR – making security an integral part of every business function.
- **Manage complex risk and ensure resilience:** As the business landscape grows more complex,

CISOs must be able to manage risk and develop cyber resilience plans that can support long-term growth without stifling innovation.

- **Communication skills:** CISOs must communicate effectively with non-technical stakeholders. This includes educating executives and the board about potential risks, security initiatives, and the company's overall security posture.
- **Adaptability:** The cybersecurity landscape is constantly evolving, and CISOs need to be adaptable. They must stay ahead of emerging threats, regulatory changes, and new technologies.
- **Crisis management:** Despite the increased focus on proactive cybersecurity, CISOs must still lead their organizations during crises. Their ability to respond quickly and decisively during a breach is crucial.

### Cybersecurity Leadership and Business Strategy

The role of the CISO has shifted from a reactive risk manager to a proactive, strategic business leader. Cybersecurity is now a fundamental aspect of business strategy, not just risk mitigation. For today's CISO, success means aligning security strategies with the company's overall growth plans, helping the organization not only stay secure but also drive innovation and business transformation.

For example, in a recent placement with a leading global tech company, the CISO had to oversee a global security strategy that spanned multiple international teams.

This leader was tasked with developing a security infrastructure that could scale with the company's expansion into new markets while ensuring compliance with regional regulations like GDPR. Their ability to integrate security with product development and business growth was crucial to the company's success.

This type of strategic alignment is essential in today's business world. The

Today's cybersecurity leaders must be able to align their vision with the company's business strategy, collaborate across functions, and drive business success while managing risk.

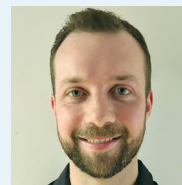
Their role is evolving from a technical expert to a strategic partner who guides their organization through both today's challenges and tomorrow's opportunities.

CISO role is no longer just about securing networks – it's about creating a security culture that supports innovation while enabling sustainable business growth.

### Clarifying the Modern CISO's Impact

The modern CISO is far more than just a protector of networks. Today's cybersecurity leaders must be able to align their vision with the company's business strategy, collaborate across functions, and drive business success while managing risk. Their role is evolving from a technical expert to a strategic partner who guides their organization through both today's challenges and tomorrow's opportunities.

As organizations continue to face complex cyber threats and rapid technological changes, the right cybersecurity leadership will be the key to ensuring business resilience and long-term success.



Sean Cleary is Partner & Cybersecurity Practice Lead at Riviera Partners, a global executive search firm specializing in placing top talent in cybersecurity, AI, data, engineering, product management, and more. He can be reached at [scleary@rivierapartners.com](mailto:scleary@rivierapartners.com).



# Member PERKS and PARTNERSHIPS



## Office and Professional Needs



Save on dental and vision insurance for you, your family, and your company.



Save on your professional liability insurance.

PACE  
PROFESSIONAL SERVICES



Accountants Advisory Group is our select provider in the area of CPA firm mergers and acquisitions consulting.



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Save 40% on select books of the month and 25% on all CCH tax and accounting books.



Get new and improved UPS flat rate pricing with savings of 25-50%.



Protect you, your family, and your workforce from identity theft and cyber attacks with protective tools and support services.



Save up to 75% on preferred products with free delivery on qualifying orders.



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CPA Exam Review Course discounts are available from leading providers: Universal CPA Review, Becker CPA Review, Gleim CPA Review, UWorld Roger CPA Review, Surgent CPA Review, and Yaeger CPA Review.

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A MOMENT AWAY



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[www.benefits-bridge.com](http://www.benefits-bridge.com)

## Benefits Spotlight

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We offer a solution that significantly reduces the amount of responsibility a plan sponsor must take on:

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- Fiduciary protection
- Compliant
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- Well-known providers

#### Select from two pooled solutions.

- Enjoy a professional suite of recordkeeping, administrative, fiduciary, and investment management services under two plan options:
  - 401(K) Retirement Plan Exchange®
  - 401(K) Choice Pooled Employer Plan (PEP)

We make it easy for employers of all sizes to offer a high-quality retirement plan.

## 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](mailto:MarWilliams@acrisure.com) or view our Specialty Benefits Guide at [www.ctcpas.org/MemberPerks](http://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](http://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.



PACE  
PROFESSIONAL SERVICES

### Professional Liability Insurance

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

# Professional Development

▶ Register for these programs and hundreds more at [www.ctcpas.org/Register](http://www.ctcpas.org/Register).

Date	Title	Course Code	Member Early/Standard	Nonmember Early/Standard	CPE Hours	Location
<b>October</b>						
10/20-23	AHI: Level I – Basic Staff Training	BST1-24C	\$800/\$835	\$925/\$960	24	Online
10/22	The Complete Guide to the Preparation of Form 1041	1041	\$279/\$314	\$399/\$434	8	Online
10/23	AHI: Level IV – Management and Leadership Essentials Training	MLE-8	\$279/\$314	\$399/\$434	8	Online
10/27-30	AHI: Level III – Beginning In-Charge Staff Training	BIC3-24B	\$800/\$835	\$925/\$960	24	Online
10/28	Don Farmer's Demystifying Sales Tax	DFDST	\$39/\$39	\$49/\$49	1	Online
10/28	Personal Financial Planning Conference	PFPWEB	\$279/\$314	\$399/\$434	8	Online
10/30	The Essential Multistate Tax Update	MST4	\$140/\$160	\$205/\$225	4	Online
10/31	Surgent's Annual Tax-Planning Guide for S Corporations, Partnerships, and LLCs	TPGS	\$279/\$314	\$399/\$434	8	Online
<b>November</b>						
11/3-4	Northeast Finance & Accounting Convention: Where Finance, Technology, & Leadership Converge	NFAC	\$209/\$239	\$334/\$364	9	Mashantucket
11/4	Guide to Understanding the At-Risk Basis Rules and Forms 6198 and 7203	UARB2	\$79/\$89	\$114/\$124	2	Online
11/4	Taxation of Partnership Distributions and Sales of Partnership Interests	PDS4	\$140/\$160	\$205/\$225	4	Online
11/5	Understanding S Corporation Taxation: Compensation Issues and Entity-Level Taxes	SCC2	\$79/\$89	\$114/\$124	2	Online
11/5	Understanding S Corporation Taxation: Late S Corporation Elections, Disproportionate Distributions, and Selling Shares	SCL2	\$79/\$89	\$114/\$124	2	Online
11/5	Surgent's Mastering Basis Issues for S Corporations, Partnerships, and LLCs	HMB4	\$140/\$160	\$205/\$225	4	Online
11/5	Practical Tools and Tips to Help CPAs Manage Risk	TTMR	\$140/\$160	\$205/\$225	4	Online
11/6	Real Estate Taxation: Critical Considerations	RET4	\$140/\$160	\$205/\$225	4	Online
11/6	Critical Issues Involving Taxation of Construction Contractors	TCC4	\$140/\$160	\$205/\$225	4	Online
11/6	Accounting and Auditing Update for Small Businesses	SMBZ	\$279/\$314	\$399/\$434	8	Online
11/6-7	AHI: Level II – Semi-Senior Staff Training	SSST-16	\$560/\$595	\$685/\$720	16	Online
11/7	What Tax Practitioners Need to Know About Medicare	MEDC2	\$79/\$89	\$114/\$124	2	Online
11/7	Social Security: Dispelling Common Myths with Essential Truths	SMT2	\$79/\$89	\$114/\$124	2	Online
11/7	K2's Artificial Intelligence Conference	AICWEB-B	\$279/\$314	\$399/\$434	8	Online
11/7	Comprehensive Guide to Understanding SSARs	SSARS8	\$279/\$314	\$399/\$434	8	Online
11/10	Guide to Calculating S Corporation Shareholder Stock and Loan Basis	CSSB2	\$79/\$89	\$114/\$124	2	Online
11/10	Depreciation Rules for Bonus and Section 179 Expensing	DRBE2	\$79/\$89	\$114/\$124	2	Online
11/10	Guide and Update to Compilations, Reviews, and Preparations	CRU4	\$140/\$160	\$205/\$225	4	Online
11/10	Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality	ENQ4	\$140/\$160	\$205/\$225	4	Online
11/10	S Corporation Taxation: Advanced Issues	SCA4	\$140/\$160	\$205/\$225	4	Online
11/11	Attracting and Retaining Great People in Today's Ever-Changing Workplace	BLIARGP4	\$140/\$160	\$205/\$225	4	Online
11/11	The Bottom Line on the New Lease Accounting Requirements	CL4LEAS	\$140/\$160	\$205/\$225	4	Online
11/12	Annual Update for Defined Contribution Plans	UDCP2	\$79/\$89	\$114/\$124	2	Online
11/12	Small-Business Accounting, Audit, and Attest Update	SMP4	\$140/\$160	\$205/\$225	4	Online
11/13	Bankruptcy Basics: Understanding the Reorganization and Liquidation Process in These Uncertain Economic Times	BNK2	\$79/\$89	\$114/\$124	2	Online
11/13	2025 Preparation, Compilation, and Review	KHPCR-B	\$279/\$314	\$399/\$434	8	Online
11/13	State Tax 360° Conference (In-person)	ST360	\$279/\$314	\$399/\$434	8	Cromwell
11/13	State Tax 360° Conference (Online)	ST360WEB	\$279/\$314	\$399/\$434	8	Cromwell
11/14	Understanding the AICPA's Quality Management Standards	QMS4-B	\$140/\$160	\$205/\$225	4	Online
11/14	Understanding Risk Assessment with Renee Rampulla	RAS4	\$140/\$160	\$205/\$225	4	Online
11/14	Surgent's Advanced Individual Income Tax Return Issues	STRI	\$279/\$314	\$399/\$434	8	Online
11/17	The Best S Corporation, Limited Liability, and Partnership Update	BCPE	\$279/\$314	\$399/\$434	8	Online
11/17-20	AHI: Level IV – Management and Leadership Essentials Training	MLE-24B	\$800/\$835	\$925/\$960	24	Online
11/18	AHI: The Mindful CPA	MCPA2-B	\$79/\$89	\$114/\$124	2	Online
11/18	Reviewing Individual Tax Returns: What Are You Missing?	CL4ITRM	\$140/\$160	\$205/\$225	4	Online



Date	Title	Course Code	Member Early/Standard	Nonmember Early/Standard	CPE Hours	Location
11/18	Reviewing S Corporation Tax Returns: What Are You Missing?	CL4STRM	\$140/\$160	\$205/\$225	4	Online
11/18	K2's Excel Best Practices	K2EBP-B	\$279/\$314	\$399/\$434	8	Online
11/18-19	K2's Technology Conference	TECWEB-B	\$489/\$524	\$614/\$649	16	Online
11/19	K2's Excel Tips, Tricks, and Techniques for Accountants	EXL-B	\$279/\$314	\$399/\$434	8	Online
11/19-21	New England Practice Management Conference	MAP	\$899/\$899	\$1,099/\$1,099	17	Mashantucket
11/20	K2's Advanced Excel	ADE-B	\$279/\$314	\$399/\$434	8	Online
11/24	Annual FASB Update and Review	FUR4	\$140/\$160	\$205/\$225	4	Online
11/24	Update on Recent AICPA Standard Setting: Staying Current in a Changing Environment	USS4	\$140/\$160	\$205/\$225	4	Online
11/25	Artificial Intelligence for Accounting and Finance Professionals	AIP2	\$79/\$89	\$114/\$124	2	Online

## December

12/1	Surgent's Federal Tax Camp	SATC	\$279/\$314	\$399/\$434	8	Online
12/2	Construction Contractors: Critical Accounting, Auditing, and Tax Issues	CONS-B	\$279/\$314	\$399/\$434	8	Online
12/2	The Complete Trust Workshop	TCTW	\$279/\$314	\$399/\$434	8	Online
12/3	The Statement of Cash Flows – The Ignored Financial Statement	KHSCF-B	\$140/\$160	\$205/\$225	4	Online
12/3	K2's Excel Conference	KECWEB-B	\$279/\$314	\$399/\$434	8	Online
12/4	Federal Tax Conference	FTCWEB	\$279/\$314	\$399/\$434	8	Online
12/8-11	AHI: Level V – Advanced Management and Leadership Essentials	AMLE	\$680/\$715	\$805/\$835	16	Online
12/9	Cybersecurity Conference	CYBERWEB	\$279/\$314	\$399/\$434	8	Online
12/9	Reviewing Partnership Tax Returns: What Are You Missing?	CL4PTRM	\$140/\$160	\$205/\$225	4	Online
12/9	Taking Advantage of Installment Sales and Like-Kind Exchanges	ISL4	\$140/\$160	\$205/\$225	4	Online
12/9	2025 Accounting and Auditing Update	KHAAU-B	\$279/\$314	\$399/\$434	8	Online
12/10	Reducing a Business Owner Client's Exposure to Social Security and Self-Employment Taxes	REXE2	\$79/\$89	\$114/\$124	2	Online
12/10	K2's Technology for CPAs – Don't Get Left Behind	TEC-B	\$279/\$314	\$399/\$434	8	Online
12/11	The Accountant as the Expert Witness	TAEW2	\$79/\$89	\$114/\$124	2	Online
12/11	Forms 1120-S and 1065 Return Review Boot Camp for New and Experienced Reviewers	SLRR	\$279/\$314	\$399/\$434	8	Online
12/11-12	AHI: Level III – Beginning In-Charge Staff Training	BIC3-16	\$560/\$595	\$685/\$720	16	Online
12/12	Preparing and Reviewing Client-Prepared Financial Statements and General Attest Engagements	PRF4	\$140/\$160	\$205/\$225	4	Online
12/15	Transforming Accounting with AI: Practical Insights and Applications	TAAI	\$279/\$314	\$399/\$434	8	Online
12/16	Mastering Information Systems and Controls for Accounting Professionals	INSC	\$279/\$314	\$399/\$434	8	Online
12/16	K2's Microsoft 365/Office 365 – All the things You Need to Know	MSO	\$279/\$314	\$399/\$434	8	Online
12/17	Securing a Comfortable Retirement	SCR4	\$140/\$160	\$205/\$225	4	Online
12/17	Construction Contractors: Accounting and Financial Reporting Issues	CST4	\$140/\$160	\$205/\$225	4	Online
12/17	Technology Trends and Hot Topics Impacting the Accounting Profession	THT4	\$140/\$160	\$205/\$225	4	Online
12/17	K2's Next Generation Excel Reporting	NGE-B	\$279/\$314	\$399/\$434	8	Online
12/18	K2's Accountant's Guide to QuickBooks Online	QBO-B	\$279/\$314	\$399/\$434	8	Online
12/19	Guide to the AICPA Quality Management Standards	AQM2	\$79/\$89	\$114/\$124	2	Online
12/19	Accounting for Changes in Accounting Principles and Error Corrections	PEC2	\$79/\$89	\$114/\$124	2	Online

# Don Farmer's Advanced Tax Workshops with Jason Dinesen

Make sure you're fully prepared for the upcoming tax season with concrete examples to break down tax developments affecting individual and corporate income tax planning and return preparation. These programs will include up-to-the-minute updates, recurring problems, and planning ideas.

**Advanced Individual Income Tax Workshop**  
Monday, January 12 • In person & online • 8 Credits

Express Codes: AIITW (Rocky Hill), AIITWWEB (virtual)

**Advanced Corporate Income Tax Workshop**  
Tuesday, January 13 • In person & online • 8 Credits

Express Codes: ACITW (Rocky Hill), ACITWWEB (virtual)

# Fall/Winter Conferences

▶ Learn more and register at  
[www.ctcpas.org/Conferences](http://www.ctcpas.org/Conferences).



## Personal Financial Planning Conference

*Presented in partnership with the Maryland Association of CPAs*

**Tuesday, October 28 • Online • 8 Credits**

Express Code: PFPWEB (online)

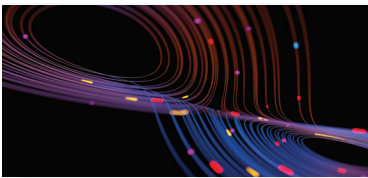


## Northeast Finance & Accounting Convention

**Monday, November 3 to Tuesday, November 4 •**

**Foxwoods Resort Casino • 9 Credits**

Express Code: NFAC (in-person)



## K2's Artificial Intelligence Conference

**Friday, November 7 • Online • 8 Credits**

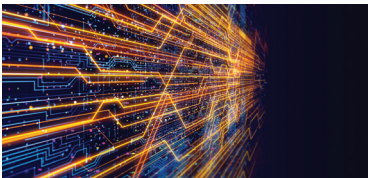
Express Code: AICWEB-B (online)



## State Tax 360° Conference

**Thursday, November 13 • Cromwell and Online • 8 Credits**

Express Codes: ST360 (in-person) and ST360WEB (online)



## K2's Technology Conference

**Tuesday, November 18 to Wednesday, November 19**

**Online • 16 Credits**

Express Code: TECWEB-B (online)



## New England Practice Management Conference

*Presented in partnership with the Massachusetts Society of CPAs*

**Wednesday, November 19 to Friday, November 21**

**Foxwoods Resort Casino • 17 Credits**

Express Code: MAP (in-person)



## K2's Excel Conference

**Wednesday, December 3 • Online • 8 Credits**

Express Code: KECWEB-B (online)



## Federal Tax Conference

**Thursday, December 4 • Online • 8 Credits**

Express Code: FTCWEB (online)



## Cybersecurity Conference

**Tuesday, December 9 • Online • 8 Credits**

Express Code: CYBERWEB (online)

# Thank You, 2025-2026 CTCPA Premier Members!

Thank you to these Premier Members (as of September 10, 2025) 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](http://www.ctcpas.org/PremierMembership).

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## >> Classified Advertisements >>

### Help Wanted

**Practices for Sale (Accounting Practice Sales) –**

Gross revenues shown: Stamford CPA firm \$1.56 million; No. Hartford County EA \$550K; Danbury CPA \$320K; North of Hartford CPA \$85K. 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](mailto:PNgroup@APS.net), or visit [www.APS.net](http://www.APS.net).

>> Place a classified ad at  
[www.ctcpas.org/Classifieds](http://www.ctcpas.org/Classifieds)





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

## Grant Thornton LLP

# Thank You for Your Support of the 2025 Accounting Scholarship Foundation Golf Tournament

Thank you to the sponsors, volunteers, raffle donors, and players who supported the annual Accounting Scholarship Foundation Golf Tournament at The Farms in Wallingford. All proceeds from the tournament are used to support CTCPA Accounting Scholarship Foundation scholarships and grants, helping tomorrow's CPAs today.



*Special thanks to the team from Robert Half!*



*Accounting Scholarship Foundation scholarship winner Lucas Monteiro told attendees how his award helped him fund his education and get closer to his goal of becoming a Connecticut CPA.*

## Major Sponsors

### Tournament Sponsor



### Golf Cart Sponsor



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## Golf Tournament Committee Members

<b>Matt Gaieski, Chair</b> CLA (CliftonLarsonAllen LLP)	<b>Matthew Sabol</b> Deloitte
<b>Katherine Donovan</b> Donovan <sup>2</sup> CPAs	<b>Anthony Santos</b> Robert Half Finance and Accounting
<b>Daniel Horvath</b> Beers, Hamerman, Cohen & Burger, P.C.	<b>Lisa Schwartz</b> Integrity Merchant Solutions
<b>Teri Pough</b> Baker Tilly US, LLP	<b>Cindy Panioto</b> Staff Liaison



*Representatives from golf cart sponsor Paychex thank attendees and draw their raffle prize winner.*



*Tournament chair Matt Gaieski and Lucas Monteiro draw the major raffle winners.*



## Member News

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



Norbert Jurkiewicz

HarperWhitfield P.C., with offices in Farmington and Weatogue (Simsbury), recently announced that **Norbert Jurkiewicz** joined the firm as a Supervisor. He brings diverse public accounting experience spanning tax, audit, fiduciary services, and client advisory support working with software companies, engineering firms, medical practices, and government contractors.

**Kask & Company LLC, Certified Public Accountants and Business Advisors** announces its new office location at 12 National Drive in Glastonbury. Kask & Company CPAs, previously known as Borgida & Company CPAs, is led by managing partner **James Kask**. Borgida & Company had operated in Manchester for more than 60 years. Kask has led Borgida & Company, formerly a division of Murphy & Company CPAs, since January 2024. The company moved to Glastonbury in December 2024 and was renamed Kask & Company in April 2025. In addition to its Glastonbury office, Kask & Company has maintained Borgida & Company's two other locations at 1734 Storrs Road in Storrs and 8 West Main Street in Niantic.

**Nicola, Yester & Co., P.C.** in Glastonbury announced that **Paquette Mancarella & Company, LLC**, a Rocky Hill-based CPA firm specializing in accounting services, tax planning, and tax compliance for individuals and small businesses, has merged with the 39-year old company. The combined firm will have 25 employees and includes seven partners in its Glastonbury office under the continued name Nicola Yester & Company, P.C.



Angelina Mancarella

Nicola Yester & Company also announced **Angelina Mancarella** as the firm's newest Partner as part of the merger with Paquette Mancarella & Company, bringing her staff with her. She focuses on providing tax and accounting services to businesses in a wide variety of industries, including construction, manufacturing, and other professional services.



Casey O'Brien



Crystal Germanese

Glastonbury-based MahoneySabol announced the promotion of **Casey O'Brien** to Partner. In his new role he will lead assurance engagements across a wide range of industries, with a particular focus on manufacturing, real estate, retail gasoline distribution, and transaction advisory services. The firm also announced the appointment of **Crystal Germanese** as a Partner in the firm's tax department. With more than 20 years of experience working closely with privately held businesses and their owners, Crystal has significant experience across a range of industries, including real estate, construction, and retail.

## SRC Certified Public Accountants, PC Celebrates 50 Years



SRC Certified Public Accountants, PC in Glastonbury recently celebrated its 50th anniversary. Founded in 1975 by **Mark Sheptoff** and **John Reuber**, SRC Certified Public Accountants, PC has grown over the past five decades from three employees to 20 full- and part-time employees serving clients across diverse industries.

Firm Managing Partner **James Bascetta** said, "Reaching this 50-year milestone is a testament to the hard work and dedication of our team, as well as the support of our loyal clients and the community. We are incredibly grateful for the trust placed in us and proud of the relationships we have built over the years."



## Whittlesey Celebrates 15th Annual Community Day



More than 90 Whittlesey team members continued the firm's annual day of volunteerism with projects at Bushnell Park Foundation, the Diaper Bank of Connecticut, and the Zoo in Forest Park. Volunteers engaged in clean-up efforts, construction and painting projects, and more. At the Connecticut Diaper Bank, team members packaged donations to support families in need.



Paul Iannone



Danny Pannese

**Paul Iannone** and **Danny Pannese**, both Associate Professors in the Jack Welch College of Business & Technology at Sacred Heart University, published "When the Audit Goes Beyond the Audit: An Interview with James Mastracchio, Esq." for the March/April 2025 issue of the *Journal of Taxation*.



Mark Zampino

The Connecticut Chapter of the Future Business Leaders of America (FBLA) has named CTCPA Honorary Member **Mark Zampino** as its 2025 Businessperson of the Year. Mark was recognized for his outstanding leadership in shaping the future of business leaders through his inspirational seminars and workforce development. As a recruiter at Southern Connecticut State University for the Southern MBA Program and director of its Professional Enrichment Platform, Mark has played a pivotal role in connecting academic excellence with real-world career opportunities.

## KPMG Volunteers at Boys & Girls Club of Greenwich as Part of Nationwide Community Impact Day



KPMG LLP recently celebrated its Community Impact Day, a nationwide day of service that provides employees of all levels flexible and meaningful ways to come together both in-person and virtually to serve our communities.

In Greenwich, KPMG volunteers spent the morning at the Boys & Girls Club of Greenwich (Camp Simmons) leading activities like field games, a paint war, book readings, and more with campers ages 5-12.



Advocacy. Community. Education.

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