September/October 2015

Connecticut CPA

Advocacy. Community. Education.

A publication of the Connecticut Society of Certified Public Accountants


Peer Review


Employee Benefit Plans

INTEREST GROUP Reboot

From a brand-new interest group aimed at creating programming and events for experienced professionals 35 and older to a redesigned online hub, CTCPA interest groups are getting a reboot.
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Pr!me


Trust, Estate, and Gift Taxation


New and Young Professionals


Not-for-Profit Organizations


Valuation, Forensic, and Litigation Support



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Advisory Council Nominations Open

Are you interested in learning more about the Advisory Council and its mission to help guide the future of the CTCPA? We're seeking nominations for next year's group of leaders. *page 6*

Features

Upcoming Programs and Events

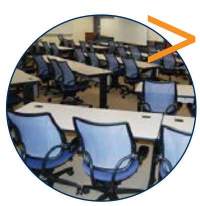
Member Matters

Get **Connected**

Find work or get help with the **Per Diem Directory.**

Looking for work? You can search the listing of posted per diem opportunities as well as list your own profile detailing your skills, expertise, and location. Looking for help? You can post your open per diem positions and also peruse the listing of members available to work.

>> www.ctcpas.org/PerDiem



Need **professional meeting space**?

The CTCPA Education Center is the perfect location for your next business meeting, staff retreat, or class. Conveniently located at 716 Brook Street in Rocky Hill, the warm, inviting space provides the right atmosphere for you to conduct your business. Catering is available.

>> www.ctedcenter.com

Volunteer for a local **not-for-profit.**

The CTCPA Not-for-Profit Organizations Committee has set up a service to help connect members with local not-for-profits seeking volunteers. Visit our website for a listing of opportunities, with basic information about the organization and the expected time commitment.

>> www.ctcpas.org/NFPBoards

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www.twitter.com/**ConnecticutCPAs**
www.twitter.com/**ctcpaCPE**

www.linkedin.com
Group: **CTCPA**

www.ctcpas.org

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Connecticut CPA

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CTCPA
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Editor's Note

From New Groups to Established, CTCPA Interest Groups Get a Reboot

CTCPA new and young professionals (NYP) programming, led by the New and Young Professionals Cabinet, has been growing like wildfire over the past several years. The pages of this magazine are packed with NYPs at sports tournaments, charity events, and happy hours.

Recently, a new question has begun to emerge. "I'm no longer eligible to attend 35 and younger programming. Where do I belong now?" Let's face it – NYP group members can't stay younger than 35 forever, and many members joined the CTCPA before these NYP programs even existed.

The CTCPA Advisory Council tackled the question of "what's next?" at its last few meetings and came up with two solid answers – one is a new initiative, and one has been a part of the CTCPA for decades.

>> Pr!me – We've put together an enthusiastic group of members charged with creating programming and events for experienced professionals 35 and older, with an emphasis on charity and community-based events.

>> Interest Groups – For years, CTCPA members have come together for in-depth discussion, networking, and to hear from industry experts. These focused groups are a great "next step" for NYPs as well as the perfect place for any members looking to tap into the membership's knowledge base or work on a specific niche project.

Advisory Council discussion revealed that there may be a misconception amongst the membership that you need to be a subject area expert to join an interest group. Nothing could be further from the truth! Interest groups are a great place for new and young professionals to learn, members in the prime of their careers to meet up and share information, and anyone interested in exploring a new niche to test the waters. Anyone at any career stage is welcome.

At the newly launched www.ctcpas.org/interestgroups, you can browse group descriptions and sign up for meetings. We've begun snapping photos of each group so you can see some of the friendly faces you'll meet when you attend a meeting (like the ones on this issue's cover!) and we'll highlight a different group in each issue of the magazine. You can meet the Trust, Estate, and Gift Taxation Interest Group on the page at right.

See you next issue,

Kirsten

Kirsten Piechota, Managing Editor

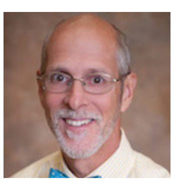
Experience Trust, Estate, and Gift Taxation With Us!

Are you new to CTCPA,
Pondering a professional path?
We're exploring, too.

Maybe you're a seasoned practitioner,
Entering the TEG space?
We're progressing with you.

Possibly you're a TEG veteran,
Looking for brainy buddies?
We walk in your wingtips.

A Note from Interest Group Chair Paul Czepiga



What better way is there to learn than from exchanging ideas with your peers – and the more, the merrier. That is why one of our goals is to grow our interest group's membership of new as well as experienced practitioners – a "win-win" for everyone. Plus we will also have our usual panoply of outside expert panelists to learn from, too.

Don't miss out!

Looking to learn a little more? I would be would be happy to chat. Contact me at Paul@ctseniorlaw.com or 860-236-7673.

Kickstart Your Morning
coffee • tea • bagels

Wednesday, October 21 • 8:30-10:00 a.m.
1041s – Pitfalls and Current Issues
CPE: 1 hour • Express Code: TEG1021

Hear the latest on 1041s from expert John J. Palmeri, CPA, LLM, principal of John J. Palmeri, Attorney at Law. Get to know us a little better at the interest group business meeting after the presentation.

Eat. Drink. Learn.
wine • beer • pizza

New!

Monday, October 26 • 5:30-8:00 p.m.
Fundamentals of Estate and Gift Taxation
CPE: 1 hour • Express Code: TEG1026

Looking for a new niche? Sample the basics of estate and gift taxation along with pizza, beer, and wine.

This is a great opportunity to explore the specialty and network with your peers!

Register at www.ctcpas.org/register.

CTCPA. Your people. Your place.

Want to Help Shape the CTCPA's Future?

Nominate yourself or someone else for next year's Advisory Council.

What does the Advisory Council do?

As volunteer leaders of the Connecticut Society of CPAs, Advisory Council members consider issues and opportunities within the Society and the profession and make recommendations to the Board of Directors.

Who's on the Advisory Council?

The Advisory Council consists of 30 CTCPA members; half of the members are chairs or representatives from CTCPA interest groups and half are members-at-large. Members are appointed by the Nominating Committee for one-year terms and can serve up to five consecutive terms.

The Advisory Council membership consists of men and women in public practice, private industry, and academia from all four corners of the state and in all stages of their careers.

Why should I want to be part of the Advisory Council?

"The Advisory Council is making a difference and implementing change and support structure in the accounting profession," said **Mary Wisenski**, 2015-2016 Advisory Council chair. "These are real issues facing the profession and in turn our professional lives. Let's make a positive difference and move forward together!"

What's the time commitment?

There are three half-day meetings in June, September, and January. (We even provide breakfast and lunch!) As representatives of the Society, Advisory Council members are also invited to special events and programs throughout the year.

What has the Advisory Council accomplished so far?

Since its origins in 2007, the Advisory Council has been a driving force behind a number of successful Society initiatives including:

- Interview Day
- The Educators of Excellence ("Eddy") awards and the accompanying Educator Appreciation Night
- The Essential Event
- The bylaws revision allowing non-CPAs to become CTCPA members

In addition to the major undertakings listed above, members have discussed everything from upcoming social events for the not-so-new-and-young professionals and Fairfield County new and young professionals to Connecticut's fiscal situation and changes in the peer review and continuing professional education arenas.

Submit your nomination at www.ctcpas.org/leadership.

You can nominate yourself or someone else for next year's Advisory Council or Board of Directors.
The Nominating Committee meets each November, so your nomination will be considered at that time.
To learn more, contact Executive Director Art Renner at artr@ctcpas.org or current Advisory Council Chair Mary Wisenski at mwisenski@fmlcpas.com.

Accounting Enrollments Continue Upward Trend, Reach All-Time High

AICPA Report Finds Public Accounting Firms Hired Largest Number of Accounting Graduates on Record in 2014

Enrollments in undergraduate and graduate accounting programs increased in the 2013-2014 academic year, and combined to cross the 250,000 threshold for the first time. On the recruiting side, accounting firms hired a record number of accounting graduates in 2014, representing a seven percent increase from the previous survey. That's according to the 2015 *Trends in the Supply of Accounting Graduates and Demand for Public Accounting Recruits* report, released recently by the American Institute of CPAs. (Read the full report at www.ctcpas.org/aicpatrends.)

The report found optimism from both universities and firms that the growth of the accounting profession will continue. Ninety-seven percent of bachelor's programs and 70 percent of master's programs report that they expect their enrollment to be the same or higher within two years of responding to the survey.

Building upon the record levels of hiring, 91 percent of firms reported that they expect to hire at the same or an increased level in the following year. Larger firms are particularly optimistic about future hiring, with all firms employing more than 200 CPAs reporting that their hiring will either increase or stay the same in the next year. This indicates that job prospects for current enrollees in accounting programs as well as recent graduates remain extremely bright.

Job prospects for current enrollees in accounting programs as well as recent graduates remain extremely bright.

While the data on enrollments and hiring represent a continued upward trend and increase from the previous survey, the number of degrees awarded for both undergraduate and graduate degrees combined showed a slowing of momentum. Degrees awarded held steady at the previous record high level (less than a one percent decrease), which was driven by a sharp increase in master's degrees awarded (31 percent) and a decline in bachelor's degrees (11 percent).

"The data in the *Trends* report is very positive overall, and the outlook for accounting students entering the profession is bright. At that same time, we've continued to see a slight widening of the gap between the number of students who are graduating with accounting degrees and the number of candidates sitting for the CPA Exam, although the growth of the gap has slowed," said **Barry Melancon**, CPA, CGMA, president and CEO of the AICPA. "It is critical that we're producing enough CPAs to replace the retiring baby boomers and that the profession is continuing to meet the ever-changing needs of the U.S. capital markets."

Complementary AICPA research has found that accounting programs that stress the importance of the CPA designation and on-campus employer recruiting both increase students' interest in becoming CPAs. Once they graduate, the single greatest influence on sitting for the CPA Exam is support from their employer to pursue their license, including time off to study and financial compensation. Conversely, accounting graduates who are recruited by companies directly out of college and foreign accounting students who return to their home countries after graduation are less likely to earn their CPA license than those who begin their careers in public accounting.

The results of the report are consistent with the findings of the Bureau of Labor Statistics *2014-2015 Occupational Outlook Handbook*, which found that employment of accountants and auditors is expected to grow 13 percent from 2012 to 2022, representing an additional 166,700 jobs.

The AICPA report found that the number of accounting students graduating with master's degrees has continued to increase dramatically. In 2014, public accounting firms hired the largest number of accounting graduates with master's degrees, reflecting an 11 percent increase from the previous report.

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Sales Tax Filing/Remitting Deadline to Return to End of Following Month for Periods Ending On or After December 31, 2015

In addition to setting state spending for the next two years, the Connecticut General Assembly passed a number of implementer bills during its late June 2015 special session. One of those implementers contains language repealing an acceleration of the reporting and remitting deadline to the 20th of the month for state sales tax that was passed in the closing hours of the 2014 General Assembly.

Following strong opposition by the CTCPA and its members and dialog between the CTCPA and the Connecticut Department of Revenue Services (DRS) coordinated by Sen. Gail Slossberg (D-14th), the DRS agreed to postpone and ultimately rescind the deadline acceleration. The postponement had made February 20, 2015 the first effective accelerated due date.

The new language, which becomes effective on October 1, returns the deadline to its previous "last day of the month" for periods ending on or after December 31, 2015. Read the full statutory language at www.ctcpas.org/salestaxfiling.

Legislative Wrap-Up

With the finalization of a state budget for July 1, 2015 through June 30, 2017, a difficult chapter in Connecticut's governance ended. As the organization representing CPAs throughout the state, the CTCPA was successful in our efforts to:

>> Obtain a rollback of monthly and quarterly sales tax filings to the end of the following month, rather than keeping the accelerated 20-day filing requirement (more on this above).

>> Maintain an independent State Board of Accountancy with its own dedicated staff.

>> Prevent the extension of sales taxes being charged for services performed by CPAs.

CTCPA Education Center Gets Powered Up

As more and more attendees began relying on laptops and e-devices to access eMaterials and the internet while at the CTCPA Education Center in Rocky Hill, our labyrinth of extension cords grew more and more complicated. It became abundantly clear that something needed to change – we needed more power!

A worker cuts trenches in the CTCPA Education Center's concrete floors to make way for new electrical boxes accessible to all course and meeting attendees.

While we have been able to provide extension cords to a few rows of course attendees who opted for electronic course materials in the past, eMaterials have been gaining popularity. In fact, beginning this May, most CTCPA CPE courses will provide eMaterials as the standard, allowing attendees to save space on their bookshelves while taking advantage of a searchable archive of course materials.

This summer, the CTCPA started construction to install electrical boxes in the floors of all three Education Center classrooms, allowing up to 120 participants convenient access to plug in laptops, smartphone chargers, and more at each meeting room desk.

The extensive renovation involved removing the carpet, sawing trenches in the concrete floors, putting in electrical boxes, and filling in with new cement. We took advantage of the upheaval to install new, modern carpeting and a fresh coat of paint, resulting in a clean, professional update to the space.

Classroom A **>>During**

Classroom A **>>After**

NASBA, AICPA Issue Proposed Revisions to CPE Standards

Public Comments Sought on Proposed Provisions

The National Association of State Boards of Accountancy (NASBA) and the American Institute of CPAs (AICPA) have issued proposed revisions to the *Statement on Standards for Continuing Professional Education (CPE) Programs (Standards)* for public comment. Published jointly by NASBA and the AICPA, the *Standards* provide a framework for the development, presentation, measurement, and reporting of CPE programs.

Although the Connecticut State Board of Accountancy currently sets the CPE standards for Connecticut CPAs, these proposed changes to NASBA standards could potentially be adopted for Connecticut CPAs in the future.

Among the most significant of the proposed revisions is the addition of nano-learning and blended learning, two new delivery methods for continuing professional education programs. The proposed *Standards* also require CPE providers to maintain the license information and status of the CPA, tax attorney, and/or enrolled agent used in the development of accounting, auditing, and tax programs. Additionally, the program descriptive materials must now be maintained for all programs, regardless of the field of study classification.

"The currently available delivery methods have remained, but the new nano-learning and blended learning delivery methods reflect the need for learning that is more personalized and on demand," said **Maria Caldwell**, Esq., NASBA's chief legal officer and director of compliance services. "More and more students and professionals are learning this way and expect CPE to keep pace," Caldwell continued.

The proposal includes two new CPE delivery methods:

>> Nano-learning

The exposure draft describes nano-learning as "a tutorial program designed to permit a participant to learn a given subject in a 10-minute timeframe through the use of electronic media (including technology applications and processes and computer-based or web-based technology) and without interaction with a real-time instructor."

>> Blended learning

Blended learning is described as "an educational program incorporating multiple learning formats (for example, lectures, discussion, guided practice, reading, games, case study, simulation); different delivery methods (group live, group internet-based, nano-learning, or self study); different scheduling (synchronous or asynchronous); or different levels of guidance (for example, individual, instructor, or subject-matter-expert-led, or group/social learning)."

Comment Period

Links to the exposure draft and more information are available at www.ctcpas.org/CPEstandards. Interested parties are encouraged to review and provide comment on the exposure draft by October 1, 2015.

2015 CPE Calendar

SEMINARS

Date	Title	Express Code	Location	CPE Hours	Member Standard/Early	Early Bird Good Through
October						
10/1	Healthcare Conference	HCARC	Rocky Hill	8	$285/$250	9/17/2015
10/16	Accountant's Liability: Raise Your Risk IQ *(Morning Session)*	AL-A	Rocky Hill	4	$180/$160	10/2/2015
10/16	Accountant's Liability: Raise Your Risk IQ *(Afternoon Session)*	AL-B	Rocky Hill	4	$180/$160	10/2/2015
10/19	Audit Workpapers: Documenting and Reviewing Fieldwork	AUDW	Rocky Hill	8	$285/$250	10/5/2015
10/20	Engagement Essentials: Preparation, Compilation, and Review of Financial Statements	FCRE	Rocky Hill	8	$285/$250	10/6/2015
10/21	Intermediate Core Tax Issues in Partnerships and LLCs	ICIL	Rocky Hill	8	$295/$260	10/7/2015
10/22	Common Frauds and Internal Controls for Revenue, Purchasing, and Cash Receipts	CFIC	Rocky Hill	8	$285/$250	10/8/2015
10/22	Intermediate Core Tax Issues in S Corporations	ICIS	Rocky Hill	8	$295/$260	10/8/2015
10/23	Internal Control and COSO Essentials for Financial Managers, Accountants, and Auditors	ICDAD	Rocky Hill	8	$285/$250	10/9/2015
10/26	Advanced Auditing of HUD-Assisted Projects	EOAHUD	Rocky Hill	8	$285/$250	10/12/2015
10/27	Yellow Book: Government Auditing Standards	EOYB	Rocky Hill	8	$285/$250	10/13/2015
10/28	Accounting and Reporting for Not-for-Profit Organizations	FSNPO	Rocky Hill	8	$285/$250	10/14/2015
10/28	Fraud for Industry	FRAUDI	Rocky Hill	8	$295/$260	10/14/2015
10/29	2015 FASB and AICPA Update	FAU-C	Norwalk	8	$320/$285	10/15/2015
10/29	Individual Income Tax Return Mistakes and How to Fix Them *(Morning Session)*	INB4	Rocky Hill	4	$160/$140	10/15/2015
10/29	Individual Tax Planning Ideas for 2015 *(Afternoon Session)*	ITP4	Rocky Hill	4	$160/$140	10/15/2015
10/30	Professional Ethics for Connecticut CPAs *(Morning Session)*	ETH1030	Norwalk	4	$190/$170	10/16/2015

WEBINARS **Can't leave the office for a seminar? Try a webinar.**

Date	Starts	Ends	Title	Express Code	Member/ Nonmember	CPE Hours
October						
10/19	9 a.m.	5 p.m.	Accounting and Auditing Update	AAUW1019	$219/$319	8
10/19	9 a.m.	5 p.m.	Preparing C Corporation Tax Returns for New Staff and Paraprofessionals	PCTR1019	$219/$319	8
10/19	9 a.m.	5 p.m.	Social Security, Medicare, and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now	SSRB1019	$219/$319	8
10/19	1 p.m.	4:30 p.m.	Taking Your Medicine: Healthcare in 2015	OBC41019	$139/$189	4
10/19	1:30 p.m.	5 p.m.	Surgent's Ethical Considerations for the CPA	ETHC1019	$139/$189	4
10/20	9 a.m.	5 p.m.	Preparing Individual Tax Returns for New Staff and Paraprofessionals	PITR1020	$219/$319	8
10/20	9 a.m.	5 p.m.	Surgent's Customized Audit Skills Training: Level 4 (In-Charge)	4AUD1020	$219/$319	8
10/20	9 a.m.	5 p.m.	The Best Federal Tax Update Course by Surgent	BFTU1020	$219/$319	8
10/20	1 p.m.	3 p.m.	Surgent's Individual Forgiveness of Debt Issues: Primary Residence, Credit Cards, Vacation Homes, College Loans and Other Loans	IFDI1020	$89/$114	2
10/21	9 a.m.	5 p.m.	The Best Individual Income Tax Update Course by Surgent	BITU1021	$219/$319	8
10/21	1 p.m.	3 p.m.	Best Ideas for Getting Money and Property Out of the Flow-Through Entity	BIGM1021	$89/$114	2
10/21	1 p.m.	3 p.m.	Fraud – A Fresh Perspective on its Impact	FRAU1021	$89/$114	2

Ready to register?

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

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>> Members-Only Meetings

Reserve your place at www.ctcpas.org/membermeetings.

Questions?
Contact Membership Activities Coordinator Phyllis Roche at phyllisr@ctcpas.org or 860-258-0216.

Easton CONNection

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

Fraudulent Tax Return Filings: State and Federal
Thursday, September 24

Presented by: **Joseph Mooney**, CPA, Deputy Commissioner, State of Connecticut Department of Revenue Services and **Joseph McCarthy**, CPA, Senior Stakeholder Liaison, Internal Revenue Service

Cyber Liability Essentials
Thursday, December 17

Presented by: **John F. Raspante**, CPA, MST, CDFA, SVP/Director of Risk Management and **Steve Vono**, CFO, North American Professional Liability Insurance Agency

Torrington CONNection

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

Review of Recent Federal and Connecticut Estate Tax Developments
Wednesday, September 16

Presented by: **John J. Palmeri**, CPA, LLM, Principal, John J. Palmeri, Attorney at Law

Tax Representation: The Impact of Recent Court Decisions
Wednesday, November 18

Presented by: **Thomas S. Groth**, Esq., Glouzgal Ramos Groth

The Friday Focus for Members in Industry

CTCPA Education Center, Rocky Hill
8:30 - 10:30 a.m. • CPE Credits: 2

Top Seven Issues CPAs in Industry Deal With
Friday, September 18

Presented by: **Peter Gioia**, Vice President and Economist, and **Eric Gjede** and **Jennifer Herz**, Assistant Counsel, Connecticut Business and Industry Association (CBIA)

IT Threats and Trends for 2016
Friday, November 20

Presented by: **Tim Weber**, Manager, Infrastructure Services and **Eric Monda**, Senior Systems Engineer, ADNET Technologies

Technology Breakfast Roundtables

Get expert advice from members of the Technology Interest Group in a fun, relaxed atmosphere. No registration necessary. Members purchase their own breakfasts.

CPE credit not available.

Wednesday, September 16
Riverdale Diner, Shelton • 8:00 a.m.

Thursday, October 15
New York Pickle Deli, Rocky Hill • 8:00 a.m.

Thursday, November 19
Cristy's Luncheonette, Westbrook • 8:00 a.m.

In-depth topics. *Local experts.* *Answers.*

Valuation, Forensic, and Litigation Support Group Dinners

CTCPA Education Center, Rocky Hill
Wine and Mingling: 5:00 - 6:00 p.m.
Dinner and Program: 6:00 - 7:30 p.m.

>> Special Program

The New Connecticut Public Corruption Task Force: Combatting Public Corruption, Fraud, and Embezzlement
Tuesday, September 8

Speaker: **Christopher M. Mattei**, Assistant U.S. Attorney and Chief of the U.S. Attorney's Office's Financial Fraud and Public Corruption Unit

Attorney Christopher Mattei will discuss the new Connecticut Public Corruption Task Force's charge to investigate corrupt public officials, the misuse of public funds, and related criminal activity.

The task force includes representatives from the Federal Bureau of Investigation, U.S. Postal Inspection Service, Internal Revenue Service – Criminal Investigation Division, and the Inspector General's Offices of the United States Department of Health and Human Services and the United States Department of Housing and Urban Development.

The task force is focused on rooting out not only corrupt elected officials, but also federal, state, and municipal employees who use their position for personal gain at the expense of the public good. It has already made progress in several investigations, including the recent arrest of the former finance director of Plymouth, who allegedly embezzled more than $800,000 from the town.

Role of Expert Witnesses in Financial Issues: Feedback From the Bench
Tuesday, November 10

How can financial expert witnesses help the tier of fact in resolving financial issues? In previous meetings, Valuation, Forensic, and Litigation Support Group dinner guests have heard from several lawyers as they've shared their tips in regards to expert testimony. Now, join us as we get feedback directly from the bench!

Valuation of Companies with Negative Earnings: A Practical Approach
Tuesday, February 9, 2016

Presented by: **Gregory Guay**, Principal, Stellar Ventures Merchant Banking

A built-in network.

>> Get to Know the CTCPA Interest Groups!

Whether you're just looking to explore a new niche or you're an expert in your field, CTCPA interest groups are a fantastic way to expand your network, get answers ... and have a little fun in the process.

Trust, Estate, and Gift Taxation Interest Group
Wednesday, October 21 • 8:30 a.m.
CTCPA Education Center, Rocky Hill

1041s: Pitfalls and Issues
Presented by: **John J. Palmeri**, CPA, LLM, Principal, John J. Palmeri, Attorney at Law
See page 7 for more on this meeting.

Trust, Estate, and Gift Taxation Interest Group
Monday, October 26 • 5:30 p.m.
CTCPA Education Center, Rocky Hill

Fundamentals of Estate and Gift Taxation
See page 7 for more on this meeting.

State Income Taxation Committee
Thursday, November 12 • 8:30 a.m.
CTCPA Education Center, Rocky Hill

Federal Income Taxation Interest Group
Thursday, November 19 • 8:30 a.m.
CTCPA Education Center, Rocky Hill

Social Security and Today's Family
Presented by: **Kristen McGarry**, CRC, Senior Regional Vice President, Retirement Solutions Division, and **James Schomburg**, JD, Retirement Resource Group, Pacific Life Insurance Company

Learn more on our newly redesigned interest group pages online at
www.ctcpas.org/interestgroups.

Fourth Annual Beginner's Golf Clinic

It's Just LIFE

A program for professional women.

Almost two dozen women turned out for the fourth annual Beginner's Golf Clinic at Tunxis Plantation Golf Course in Farmington. The ladies learned the basics of chipping, putting, and driving, then capped the evening off with appetizers and cocktails in the course's pub.

>> View more photos at www.ctcpas.org/photos.

New and Young Professionals Upcoming Events

Learn more and register at **www.ctcpas.org/nyp**!

Happy Hour and a Headshot with the Young Lawyers Section of the Bar

Wednesday, September 30
6:00 – 8:30 p.m.
The Tavern Downtown, Hartford

Enjoy drinks and apps while networking with members of the Young Lawyers Section of the Connecticut Bar. Back by popular demand, we'll also provide a mobile portrait studio so you can pose for a high-resolution digital headshot photo.

JA in a Day

Friday, October 23
9:00 a.m. - 3:00 p.m.
Charles Wright Elementary School, Wethersfield

Present a one-day financial workshop to elementary school students.

College Month

October

We're looking for new and young professionals looking to share their experiences! If you're willing to sit on a panel at your alma mater or any other Connecticut college or university, we need you.

CPA Exam Cram

Thursday, November 12
6:00 - 8:00 p.m.
CTCPA Education Center

Join us for an informational session geared especially for new professionals and students interested in pursuing the CPA designation.

NYP Leadership Conference

Monday, November 3
8:30 a.m. – 4:00 p.m.
CTCPA Education Center

This new conference addresses the skills you need to become a successful leader, with sessions on networking, communication, and leadership skills, as well as team building and identifying strengths to be successful. There are two breakout tracks, one for new professionals and one for those with several years of experience preparing for a management role.

Mingling & Merriment NYP Holiday Party

Thursday, December 10
6:30 - 10:00 p.m.
The Society Room of Hartford

Mingle with other new and young professionals over drinks and heavy hors d'oeuvres while celebrating the holidays in the stunning marbled grandeur of The Society Room of Hartford.

Annual Charity Drive: Pajamas for Local Kids in Need

November 16 - December 18

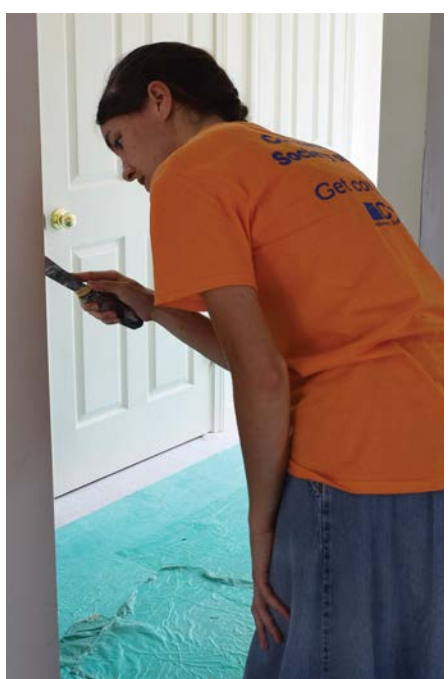
This year's charity drive will benefit Pajama Program, a not-for-profit providing new pajamas to local children in need, many of whom are waiting and hoping to be adopted.

Join us!

Want to be a part of something great? Make sure you're at the next New and Young Professionals event! See the listing on page 19 or visit www.ctcpas.org/nyp to sign up for events or join the New and Young Professionals Group.

Habitat for Humanity Build

A dozen new and young professionals braved the heat (on one of the hottest days of the year!) to put the finishing touches on a Hartford Habitat for Humanity home. Volunteers patched holes, painted, installed lattice on a porch, and more to get the home ready for its new owners.



>> View more photos at www.ctcpas.org/photos.

Help us deliver warm sleepwear to children in need!

We're sponsoring drives around Connecticut to benefit Pajama Program, a not-for-profit providing new pajamas to local children in need, many of whom are waiting and hoping to be adopted.

We're collecting sleepwear for children of all ages, from infants to teens 18 years old (up to adult size XXXL). You can also make a financial donation.

Start collecting now!

Collect new pajamas in a central location at your office. Encourage staff and clients to join in! You can download and print a participation poster at www.ctcpas.org/nyp.

Schedule your pick-up

CTCPA will pick up the items from November 16 to December 18.

To schedule your pick-up, contact Tyler Losure at 860-258-0215 or tylerl@ctcpas.org.

In the neighborhood?
You can also drop off donations at the CTCPA Education Center from 8:30 a.m. to 4:30 p.m., Monday through Friday.

Nominate a Rising Star!

We're looking to again recognize new and young professionals (aged 35 and younger) who have distinguished themselves as emerging leaders in the accounting profession. Honorees will be featured in *Connecticut CPA* magazine's "New and Young Professionals to Watch" and recognized at the New and Young Professionals Holiday Party on Thursday, December 10.

Selection of the "New and Young Professionals to Watch" will be made by a panel of the accounting profession's leaders based on professional or workplace contributions, community service, CTCPA involvement, or other relevant activities. Individuals may self-nominate.

Download a nomination form at www.ctcpas.org/watch.

Nominations must be submitted by Wednesday, October 14, 2015.

More than 120 new and young professionals present a check for $2,600 to representatives from Camp Nerden in Middletown, a free camp for children and adults from the central Connecticut area with intellectual disabilities.

New and Young Professionals Kickball Tournament Raises $2,620 for Middletown's Camp Nerden

The sixth annual New and Young Professionals Charity Kickball Tournament drew 11 teams totalling more than 120 new and young professionals to the field at Norton Park in Plainville for a day of fun and friendly competition on August 15. The tournament raised $2,620 to benefit Camp Nerden in Middletown, a free camp for children and adults from the central Connecticut area with intellectual disabilities.

Participants enjoyed a cookout lunch sponsored by CWPM, LLC and kicked back with lawn games between kickball play.

Marcum again took home the title and the trophy, beating ESPN in the championship round. Thanks to everyone who came out, including players from the following firms:

CohnReznick
ESPN
Filomeno & Company
Fiondella, Milone & LaSaracina
Grant Thornton
King, King & Associates
Meyers, Harrison & Pia
Marcum
McGladrey (two teams!)
O'Connor Davies
People's Bank
Whittlesey & Hadley

>> View more photos at www.ctcpas.org/photos.

Thank you to our sponsors!

CWPM, LLC
Picnic Sponsor

Regent Wealth Management Group
Field Sponsor

J.S. McCarthy Printers
Large Printed Check Donation

Plainville Parks and Recreation
Park Use Donation

Member Snapshots

We’re looking for your snapshots of interest to the general Society membership. Items submitted should relate to Connecticut’s professional accounting community and will be included as space allows and at the discretion of the editor. Please send your submissions to Managing Editor **Kirsten Piechota** at kirstenp@ctcpas.org.

Whittlesey & Hadley’s Community Day Serves Area Nonprofits

Whittlesey & Hadley in Hartford hosted its seventh annual Community Day in July. This year employees of the firm and its subsidiary, The Technology Group, volunteered at community-based organizations primarily focused on providing academic, behavioral, and human services to the disabled and families and children.

Whittlesey & Hadley volunteers painted 8,000 square feet of academic and workforce development space at Our Piece of the Pie’s OPPortunity Academy at 20-28 Sargeant Street in Hartford.

Nearly half of the volunteers, a team of 30, painted classrooms and office space at Our Piece of the Pie (OPP) at 20-28 Sargeant Street in Hartford. The nonprofit’s mission is to help urban youth become economically independent adults through relationship-centered programs in academics, youth development, and workforce readiness. The painted space included a portion of OPPortunity Academy, formerly Opportunity High School, which helps struggling students graduate from high school ready for college and careers.

“This year we were proud to play a role in OPP’s transition to OPPortunity Academy and helping them to open the new school on time this fall,” said **Drew Andrews**, managing partner of Whittlesey & Hadley. “Community Day affords our team members a broad range of rewarding experiences that allow them to give back to area nonprofits and our clients.”

Other team members volunteered at the Boys & Girls Club Family Center in Springfield, Catholic Charities in Hartford, Watkinson School in Hartford, and The Bridge Family Center in West Hartford.

Since 2009, Whittlesey & Hadley’s Community Day has given back to more than 35 nonprofit organizations throughout the region.

BlumShapiro Golf Classic Supports New Haven-Area College Students

Nearly 140 golfers gathered at the BlumShapiro Golf Classic, held on July 27 at the New Haven Country Club. The annual tournament, reception, and raffle benefit the Greater New Haven Chamber of Commerce Scholarship Fund for New Haven-area students pursuing college degrees in business. To date, nearly $60,000 in scholarships has been raised for the students.

Pictured at the BlumShapiro Golf Classic are (from left) John Zinno, BlumShapiro Shelton Office Managing Partner; Elisabeth McNivens, a junior at Southern Connecticut State University and one of six students who will receive scholarship money from the 2015 BlumShapiro Golf Classic; and Tony Rescigno, president of the Greater New Haven Chamber of Commerce.

New and Young Professionals Cabinet Hears from Community Accounting Aid & Services Volunteers

Photos courtesy of William Greenspan.

Eastern Connecticut State University student and KPMG tax intern Chris Gardella (left) and University of Bridgeport graduate and Bregman & Company staff accountant Rui Jiang speak to the New and Young Professionals Cabinet about their experiences volunteering with Community Accounting Aid & Services.

The CTCPA New and Young Professionals Cabinet recently heard from two volunteers from Community Accounting Aid and Services (CAAS) about their experiences helping those less fortunate.

CAAS encourages, educates, and assists the economically disadvantaged in complying with their tax and other financial responsibilities. The group seeks to boost its volunteer base and provide meaningful public service opportunities to both new and seasoned accounting professionals.

"I have two years' experience in the Volunteer Income Tax Assistance (VITA) Program in which I help both residents and nonresidents file their income tax returns," explained **Rui Jiang**, a 2014 graduate of the University of Bridgeport and a staff accountant at Bregman & Company in Stamford. "I love helping people with their problems. It is so nice to see the smiles on their faces after I help them," she added.

Chris Gardella is a member of the class of 2016 at Eastern Connecticut State University and a tax intern with the Hartford office of KPMG. "Volunteering with VITA and CAAS allows me to put skills that I've learned to use in making someone else's life better," Gardella noted, "thereby making it all the more personal and meaningful to me."

>> To volunteer with CAAS, contact CAAS Executive Director **Sheryle McMillan** at sheryle@communityaccountingaid.org.

Welcome, New Members!

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

New Certified Members

Akwasi A. Ampofo, CPA, PhD, FCCA
University of Connecticut

Sean D. Bisighini, CPA
Fidelity Biosciences

George C. Clark III, CPA
KPMG

Katherine A. Contant, CPA
Farmington Bank

Gerald J. Ganz Jr., CPA
UConn Foundation

Robert E. Heiner, CPA
Fiondella, Milone & LaSaracina LLP

Jay A. Johnson, CPA
City of Hartford Internal Audit Dept.

Megan C. Kane, CPA
PwC

Nicholas C. Misenti, CPA, JD
Quinnipiac University

Xuan Truong Mountcastle, CPA
Venman & Co. LLC

John A. Patoka, CPA
Sheptoff, Reuber & Co., P.C.

Andrew M. Richards, CPA
Marcum LLP

Jennifer Schempp, CPA
Beers, Hamerman, Cohen & Burger, P.C.

Robert J. Strada, CPA
Robert J. Strada & Co., LLC

Gregory Tartaglino Jr., CPA
BlumShapiro

Georgia Tsaousis, CPA
Seward & Monde

New Associate Members

Alexander J. Angst
Massmutual Financial Group

Patrick Chase
Budwitz & Meyerjack, P.C.

Marc E. Costanzo
Budwitz & Meyerjack, P.C.

Andrew Davey
BlumShapiro

Andrea E. Davis
O'Connor Davies LLP

Caridad A. Fonseca
O'Connor Davies LLP

Jonathan Grande
DeCaprio CPA & Associates, P.C.

Elizabeth McKaige
Petrovits, Patrick, Smith & Co., LLC

Laura C. Merritt
Masotti & Masotti

Chelsea A. Pitetti
Fiondella, Milone & LaSaracina LLP

Nusha Ready
Dylewsky, Goldberg & Brenner, LLC

Lucy C. Valletta
BlumShapiro

Jeremy R. Walker
Budwitz & Meyerjack, P.C.

In Memoriam

George A. Kanehl, CPA,
a member since December 17, 1957,
passed away July 5, 2015.

Donald W. King, CPA,
a member since June 15, 2010,
passed away June 13, 2015.

Denise B. LaJoie,
a member since January 6, 1994,
passed away May 4, 2015.

Donald J. Siclari, CPA,
a member since December 4, 2014,
passed away June 11, 2015.

Herbert Silverman, CPA,
a member since October 29, 1970,
passed away June 20, 2015.

Gerald N. Stevens, CPA,
a member since October 28, 1971,
passed away June 15, 2015.

Show your member pride with the '**Member of CTCPA**' logo!

One of the many CTCPA member benefits is the right to display the "Member of CTCPA" logo on your website, stationery, social media profiles, and more.

Go to **www.ctcpas.org/logo** to read the usage guidelines and download the logo.

As this is a member benefit, you must log in.

New Students

Albertus Magnus College
Elizabeth C. Carrillo

Bryant University
Emily B. Farber
Paige Reid

Central Connecticut State University
Philip J. Garczynski
Nicholas Owen
Matthew Phothirat
Ben Tierney

Eastern Connecticut State University
Zachary Rice

Gateway Community College
Mallory J. Wood

Norwalk Community College
Dominique Thompson

Post University
Nicole L. Blum

Sacred Heart University
Elias J. Risola

Southern Connecticut State University
Refat M. Chowdhury
Alicia H. DiLorenzo
Skyler M. Mendez

University of Bridgeport
Teresa Khayalu

University of Connecticut
Ailish Keating
Christopher C. Polson

University of Hartford
Ozal Ajmal

University of New Haven
Stephanie Mazzeo

Western Connecticut State University
Daniel Elysee Jr.

>> **Do you know a college student who would benefit from student membership?**

Send them to www.ctcpas.org/students or pass along the contact information for CTCPA Career and Academics Development Coordinator **Tyler Losure** – tylerl@ctcpas.org or 860-258-0215.

Student Membership is now FREE!

The future of the accounting profession lies within the students of today. To help enhance our efforts to reach out to students and get them exposed to and involved in the profession, we will no longer charge a $25 annual fee for student membership.

Member News

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

Professional Activities

Mark Campbell, a partner in Blum-Shapiro's Shelton office, has been elected president of the board of directors of the Association for Corporate Growth (ACG), Connecticut Chapter.

Edward E. Pratesi, managing director of Brentmore Valuation Advisors in West Hartford, was a speaker at the June 26 Semiannual Quinnipiac Tax Conference. Pratesi's presentation was titled "It's Personal! An Advisor's Guide to Understanding and Valuing Personal Goodwill."

Public Service

Kenneth J. Santopietro will once again direct the statewide eighth annual Connecticut Catholic Men's Conference on October 24 at Goodwin College in East Hartford.

Honors and Awards

Mark Sheptoff Financial Planning in Glastonbury was recognized in the July issue of *Financial Advisor* magazine as one of the leading wealth managers in the United States. This is the ninth time the firm has been selected in the last 10 years.

In the Media

Frank Longobardi, CEO of CohnReznick effective October 1, was featured in the July 13 *Hartford Business Journal* feature "Longobardi plots growth strategy for CohnReznick."

Katrina Olson, an audit manager with Whittlesey & Hadley in Hartford, wrote "FASB proposes major accounting changes for nonprofits" for the July 13 *Hartford Business Journal.*

>> Classifieds >>

Place your classified at www.ctcpas.org/classifieds or contact **Kirsten Piechota** at kirstenp@ctcpas.org or 860-258-0231.

General

Are your clients receiving payments from a private mortgage (purchase money mortgage), an annuity, an award from a lawsuit, or from winning the Connecticut Lottery? Are they having financial difficulty? Divorce? Estate liquidation? Concord Equity Group, LLC is Connecticut's leader in purchasing and appraising these types of receivables. Help your clients manage the sale of these assets. 860-873-0400.

Help Wanted

Accountant – Tax – CPA firm seeking individual with 5+ years tax experience to supplement growth. Such person should have the required knowledge to complete the forms: 1120, 1120s, 1065, 1041, 1040, and related schedules. Salary negotiable, benefits included. Kindly forward your resume to: Thomas S. Monterosso, CPA, P.C., 65 Cherry St., Milford, CT 06460, email: thomas.monterosso@snet.net, or fax: 203-876-1690. Thank you.

Audit Senior – Venman & Co. LLC. We are a mid-sized public accounting firm in Shelton and have been offering quality service to our diverse client base for over 70 years. We are seeking to fill key positions on our team. 3+ years of public accounting experience; CPA a plus. Experience with ProSystem Engagement and Tax and not-for-profit audit experience are a strong plus. Benefits include education reimbursement. Reply to recruiting@venmanllc.com, fax: 203-929-9095, mail: Venman & Co. LLC, 375 Bridgeport Avenue, Shelton, CT 06484, Attn: Janet Barillari.

CPA – Create your own path in a well-established local firm. Use your entrepreneurial spirit and solid understanding of privately owned businesses to discover broad opportunities with our active CPA and business advisory firm. Experience in public accounting and CPA required. Send resume and cover letter to: Steven Bokoff, Goldblatt Bokoff LLC, 457 West Main St., Norwich, CT 06360 or steve@goldblattbokoff.com.

Fiduciary Tax Accountant/Attorney – mid-size Stamford law firm seeks Fiduciary Tax Accountant/Attorney with 5-7 years of experience to be responsible for efficient, accurate, and timely review and preparation of fiduciary tax returns and estate and trust accountings. Successful candidate will have CPA certification or tax preparer qualification; JD not required but helpful; highly motivated, detail-oriented team player, excellent written and oral communication skills. Compensation commensurate with experience. Respond at www.ctcpas.org/FiduciaryTaxAccountant.

Public Accountant – Castanho Financial Group, LLC. A career in public accounting offers many rewards, challenges, variety and client contact. We make it possible to have a fulfilling, enjoyable career here at our firm. We are a steady growing CPA firm located in East Hartford that is seeking two professionals to join our team as a Staff Accountant. We need on full-time staff accountant and a temporary tax season Staff Accountant. Our business casual office offers opportunities for advancement, growth and variety. Enjoy the rewards of direct client contact as you partner with business owners to innovatively manage change and enhance the value of their companies. Begin a long-term relationship with a firm that is a team-orientated in a beautiful setting. As our Staff Accountant, you must have an Associate's degree in Accounting and/or three years of relevant public accounting experience, including tax. Candidates should also possess the motivation and skills to work independently. Email: leann@castanhocpa.com, Fax: 8608956443, Phone: 8608956423, Mail: 1622 Main Street, East Hartford, CT 06108.

Public Accounting Senior/Manager – Smith, Watson & Company, LLP. Located in Berkshire County, Massachusetts, Smith, Watson & Company, LLP is one of the premier accounting firms in western Massachusetts since 1973. We are seeking a seasoned CPA with at least 5 years experience in public accounting whose long term goals should include an equity position with our firm. This position is based in our Great Barrington, Massachusetts office. See details at www.smithwatson.com, email: hr@smithwatson.com, fax: 413-528-1263, phone: 413-528-1111.

Senior Accountant/Tax – Stuart K. Clark, CPA, LLC. Growing Southington CPA firm seeks senior level accountant with 3+ years of public accounting experience. Our office is very business casual with unlimited growth and partner potential. Candidate should have strong personal skills and be able to handle direct client contact. Candidate must be able to prepare financial statements, and business (1120, 1120S and 1065) as well as individual income tax returns. Knowledge of QuickBooks, Excel, and Word a must. Knowledge of Ultra Tax software a plus. Salary and benefits commensurate with experience. Send resume to sclark@stuclarkcpa.com.

Staff Accountant – Bergamo Tax & Accounting, LLC. CPA firm seeking a full or part time accountant. Must be experienced tax professional in preparing individual and business returns and Quickbooks. Strong interpersonal and organizational skills. We are a growing CPA firm located in Watertown CT and are looking for the right person to fit into our company. Forward your resume to michael@bergamocpa.com or fax to 860-945-6984.

Staff Accountant – Bowman, Monaco & Black, PC. Local accounting firm seeks staff accountant with 3+ years of experience. Duties to include preparation of financial statements and preparation of various federal, state and local business and individual tax returns. Knowledge of Quickbooks and ProSystem fx software a plus. Email: rmonaco.bmb@snet.net, fax: 203-272-2485, phone: 203-272-9008, mail: P.O. Box 585, Cheshire, CT 06410.

Time for a change? Connecticut shoreline firm has fantastic career opportunity! Position includes both accounting and tax work. Tremendous growth potential and long-term opportunity. Schedule flexibility is possible. CPA or CPA candidate a must. Call 203-208-0572 or send your resume in strict confidence to Camille Murphy at camille@murphycocpa.com.

Mergers/Acquisitions

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

Filomeno & Company, P.C., with offices in West Hartford and West Haven, is interested in speaking with sole proprietors and small to mid-sized firms regarding merger or acquisition options. If you are in need of a succession plan, more infrastructural support, or are ready for retirement, please contact us. Visit our website to learn more about our firm and the services we provide to our clients and are able to offer to yours. www.filomeno.com Contact Thomas Filomeno at 860-760-7031 to discuss in confidence your situation and how we may be able to work together.

Growing firm interested in acquisitions – Bakewell & Mulhare, LLC. Well-established firm in Litchfield County is looking to acquire other small firms or sole practitioners in need of succession planning. We strive to provide our clients with the highest level of service and technical advice. We have a dedicated staff and a broad spectrum of available services. Please reply with complete confidence to Scott Mulhare at scott@bakewellmulhare.com.

Merge into a larger firm – One of the major firms in Connecticut is interested in merging in another practice. We seek a firm that is interested in becoming an integral part of our long-term growth strategy. If you are concerned about obtaining quality staff or about having the resources to achieve maximum success, we could be the place for you. To discuss this, in complete confidence, please contact Drew Andrews, Managing Partner, Whittlesey & Hadley, P.C., 280 Trumbull St., 24th Flr., Hartford, CT 06103, phone: 860-524-4430, or email: aandrews@whcpa.com.

Northern Fairfield County Tax Practice – Two retirement-minded partners with tax practice seeking successors. Individuals with current practices preferred. Please respond via the form at www.ctcpas.org/FairfieldTaxPractice.

Practices for Sale – Accounting Practice Sales. Suburban Hartford CPA grossing $203K, Hartford CPA grossing $320,000, New London County grossing $220K, and Litchfield County CPA grossing $70K. For more info, contact Lori Newcomer at 888-277-6040 or LNewcomer@APSLeader.com. Seller pays brokerage fee.

Reynolds & Rowella LLP, a leading Fairfield County CPA firm, is interested in potential acquisitions of area practices. Our areas of expertise include closely held businesses, high-net-worth individuals, litigation support, audits, and estates and trusts. We pride ourselves on providing quality, proactive solutions and services to our clients, and we are interested in discussing how we may provide solutions for your practice, too. Learn more about us at www.reynoldsrowella.com. Direct, confidential inquiries may be initiated via email to frankr@reynoldsrowella.com.

Waterbury-area CPA looking to relocate within 2 years searching for firm or individual to transition client base to. Full transition assistance. Revenue 630K. Very profitable small office. Reasonable price. Flexible payment arrangements. Great client mix. Reply to Box #1675, 716 Brook St., Ste. 100, Rocky Hill, CT 06067. Please mark envelope "confidential."

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

Educational Trust Fund Golf Tournament

Monday, September 28, 2015

The Farms Country Club, Wallingford • Registration fee: $250

Registration includes green fees, player gift, cart, buffet lunch, on-course beverages and snacks, open bar, dinner stations, hors d'oeuvres, dessert, flavored coffees, and awards.

Make a great event even better – become a sponsor!

Player Gift *$2,500*

Driving Range *$1,500*

Gold Sponsor *$1,200 each*

Tee/Green Sponsor *$250 each*

Golf Ball Sponsor *Provide a sleeve of balls for each player.*

Please also consider donating high-quality raffle prizes such as golf-related items, gift certificates, electronics, etc.

Register at www.ctcpas.org/golf.

For more information or to become a sponsor, contact **Phyllis Roche** at 860-258-0216 or phyllisr@ctcpas.org.

Firm Moves and Promotions

Send your news of firm moves and promotions to Assistant Editor **Caitlin Bailey O'Neill** at caitlinb@ctcpas.org. Headshot photographs will also be published as space allows.

Federman, Lally & Remis in Farmington promoted **Deborah L. Denno** to partner in the firm's tax practice and **Catherine H. Anderson** to partner in the firm's audit and accounting practice. **Lisa S. Morris** also joined the firm as a tax professional.

Deborah Denno

Catherine Anderson

Lisa Morris

MahoneySabol moved to 180 Glastonbury Boulevard, Suite 400, relocating the firm's existing Glastonbury offices to a singular space, which underwent a full renovation customized to the needs of the firm. The firm will occupy half of the top floor of a four-story, multi-tenant office building located next to the Somerset Square shops and restaurants.

Kevin Harris joined MahoneySabol in its tax department and **Marisa Stefano** joined the firm's audit department. As a tax senior, Harris will be working with clients in a variety of businesses providing tax preparation and planning services. Stefano brings experience in real estate and not-for-profit organizations.

Whittlesey & Hadley, P.C., headquartered in Hartford, announced that **Weinstein & Anastasio, P.C.** in Hamden joined the firm effective September 1. Weinstein & Anastasio, with roots back to 1927, will continue to serve clients from the Hamden office while acquiring the Whittlesey & Hadley brand. The combined three offices will have 155 people, including 21 partners located in Hartford and Hamden, Connecticut, and in Holyoke, Massachusetts. Whittlesey & Hadley was founded in 1961.

Barron, Yanaros & Caruso, P.C. in Wethersfield promoted **Brian Wilkinson** to manager and **Angelica Robledo** to senior accountant.

CohnReznick promoted the following to senior manager:

Dale Boutot – Assurance Senior Manager
He has worked on various types of audit, review, compilation, and tax engagements within a variety of industries including manufacturing, retail, wholesale, and real estate.

Karen Langlois – Assurance Senior Manager
She handles all of the financial aspects of her clients' businesses, including working with compliance issues and tax filings. She spends the majority of her time working with healthcare clients, where her expertise includes accounting and tax work for medical practices.

Joanne H. Marcoux – Assurance Senior Manager
She provides audit and tax services to medical practices, not-for-profit organizations, and closely held businesses.

Christopher P. Nardone – Assurance Senior Manager
He is a member of the firm's Employee Benefit Plan Audit Practice and Manufacturing and Distribution Industry Practice and also has experience working in the retail and consumer products, automobile, and technology industries.

Michael Walczak – Tax Senior Manager
He serves a large range of companies from small, privately held to large multinational corporations and also has extensive experience in the areas of pass-through entities and high-net-worth individuals. In addition, he has a strong background providing tax and consulting services to the manufacturing and distribution and life science and technology industries.

Additionally, the firm promoted the following to manager:
Danielle S. Doyon
Lana B. Ensling
Chantal Laliberte
Stephen W. Radau
Brian Trueman

CTCPA

Advocacy. Community. Education.

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