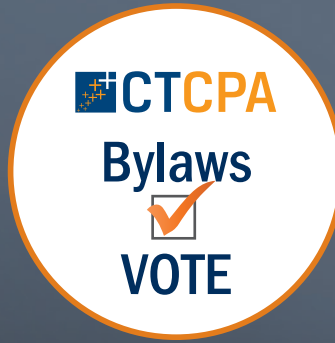


Spring 2021

Connecticut CPA

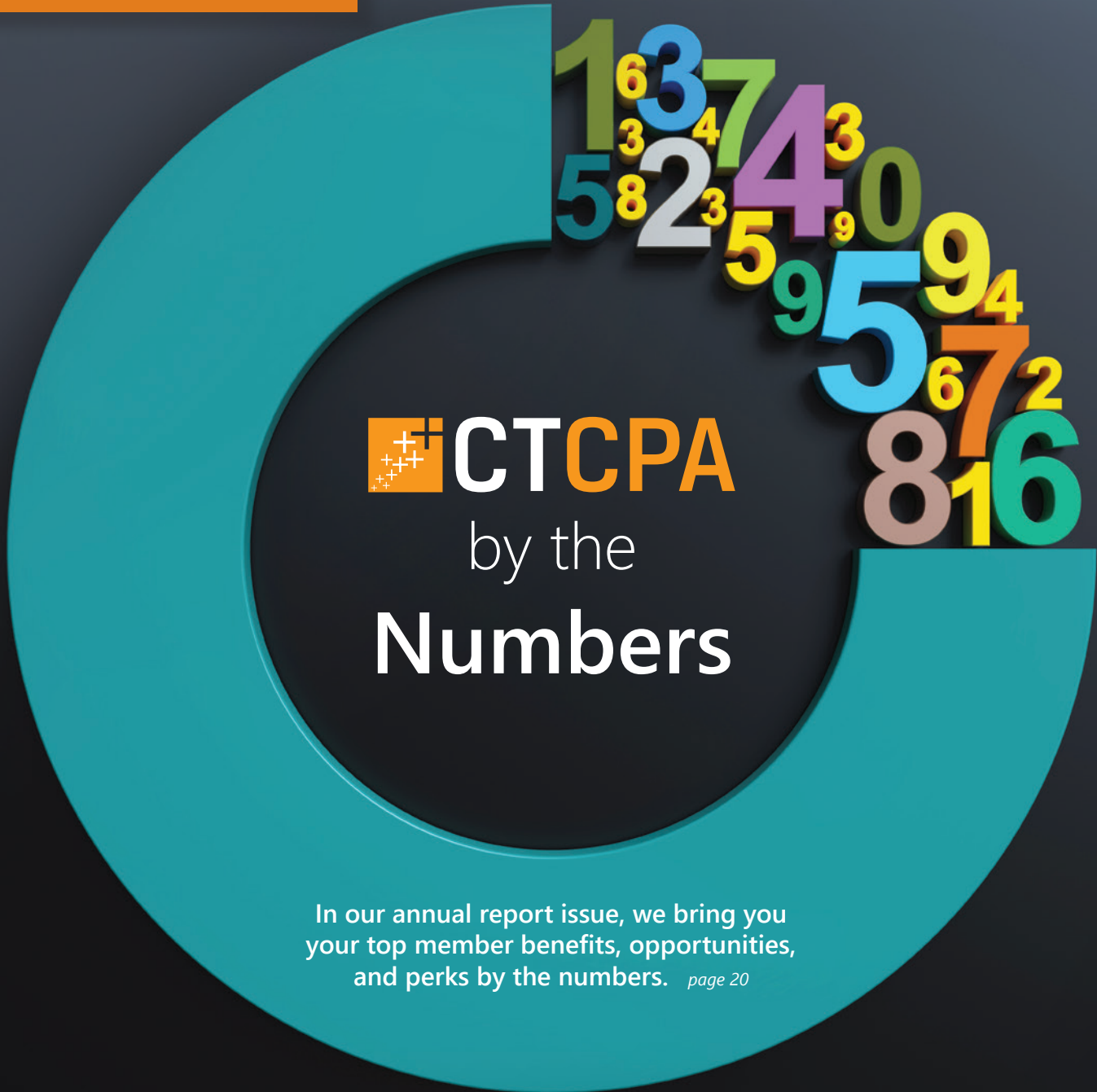
Advocacy. Community. Education.



Voting opens May 7.

Read the proposals, hear from fellow members, and find out where to cast your vote.

page 5



In our annual report issue, we bring you your top member benefits, opportunities, and perks by the numbers. *page 20*

9
2021 CTCPA Annual Meeting:
May 10

14
Meet the 2021
CTCPA Women Honorees

28
Members Celebrate Black History
Month, Black CPA Centennial



IT TAKES A STEADY TEAM TO NAVIGATE THROUGH PERILOUS WATERS.

In times of economic uncertainty and stock market volatility, you need a trusted team to help you set your financial course. Your advisor needs to understand thoroughly your circumstances to help you achieve your financial objectives. At Bradley, Foster & Sargent, we have assisted clients for over 25 years by constructing customized portfolios that have weathered the storms. Let us help you navigate toward your life and investment goals. We invite you to contact Charley Herbert today at 860-241-4636.

Bradley, Foster & Sargent, Inc. *Investment Management*

PORTFOLIO MANAGERS

Robert H. Bradley | Cameron H. Burns | Rosa Y. C. Chen | S. Tucker Childs
Timothy H. Foster | David P. Korzendorfer | Keith G. LaRose | Roger H. Manternach | Jeffrey G. Marsted
Gregory M. Miller | William R. Peelle, Jr. | Josh Peteet | Thomas D. Sargent

860-527-8050 | www.bfsinvest.com

HARTFORD, CT | WELLESLEY, MA | WEST PALM BEACH, FL



#TransformWithCTCPA



facebook.com/ConnecticutCPAs



twitter.com/ConnecticutCPAs



linkedin.com/company/ConnecticutCPAs



instagram.com/ConnecticutCPAs



youtube.com/ConnecticutCPAs



flickr.com/ConnecticutCPAs

Features

- 4 *Editor's Note: New CTCPA Website Brings Enhanced User Experience*
- 5 CTCPA Bylaws Vote Opens May 7
- 8 CTCPA Advocacy Update
- 10 *From the Executive Director: Adjusting to Our Hybrid World*
- 20 CTCPA: By the Numbers
- 28 Members Celebrate Black History Month, Black CPA Centennial

Upcoming Programs and Events

- 9 CTCPA 2021 Annual Meeting: May 10
- 12 Virtual Member Programs
- 13 Get Involved with CTCPA Committees from Wherever You Are
- 16 Professional Development Programs and Conferences

Member Matters

- 14 Meet the 2021 CTCPA Women Honorees
- 18 Member Perks and Partnerships
- 19 CTCPA Insurance Hub
- 27 Thank You, CTCPA Premier Members!
- 30 2021-2022 Leadership Slate
- 32 Welcome, New Members!
- 33 Company Moves and Promotions
- 34 Member News
- 34 Classifieds

It's Membership Renewal Time!

You + CTCPA = A partnership for today and tomorrow.



Renew online at the new www.ctcpas.org.

Our new state-of-the-art website features streamlined online renewal, an easier-to-navigate professional development hub, and fast access to your favorite member benefits.



New this year, you have the option to automatically renew your membership going forward when you pay with a credit card.



Renewing for multiple members? Request a company invoice!

We'll send you a single invoice and also give you online access to manage memberships for everyone at your organization. Please contact membership@ctcpas.org or call 860-258-4800 and press 2.



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

You can access your account and update your information online anytime on the My CTCPA dashboard at www.ctcpas.org. Questions? Reach out to membership@ctcpas.org or call 860-258-4800 and press 2.

Connecticut CPA

A publication of the Connecticut
Society of Certified Public Accountants

Connecticut CPA Team

Kirsten F. Piechota

Managing Editor/Graphic Designer
kirstenp@ctcpas.org • 860-258-0231

Caitlin Q. Bailey O'Neill

Assistant Editor
caitlinb@ctcpas.org • 860-258-0228

Cindy Panioto

Advertising/Sponsorships
cindy@ctcpas.org • 860-258-0213

CTCPA Board of Directors

President

Marie Benedetto

Innovative Business Solutions

President-elect

Brian Reilly

Travelers

Treasurer

Timothy Hedley

Fordham University, K2 Integrity

Secretary

Michael Maksymiw Jr.

Marcum

CTCPA Advisory Council Chair

Amber Moore

Goldblatt Bokoff

Member-at-Large

Katherine Patnaude

PKF O'Connor Davies

Member-at-Large

Katherine Donovan

Whittlesey

CTCPA Executive Director

Bonnie Stewart



Advocacy. Community. Education.

Opinions expressed in bylined articles appearing in this publication are those of the author(s) and do not necessarily reflect CTCPA opinions or positions nor do they constitute endorsements.

Connecticut CPA Spring 2021, Vol. 62, Issue 2 (USPS #004 433) is published quarterly for members of the Connecticut Society of CPAs by the CTCPA, 716 Brook Street, Suite 100, Rocky Hill, CT 06067-3433. Periodicals postage paid at Hartford, CT and at additional mailing offices. POSTMASTER: Send address changes to CTCPA, 716 Brook Street, Suite 100, Rocky Hill, CT 06067-3433.

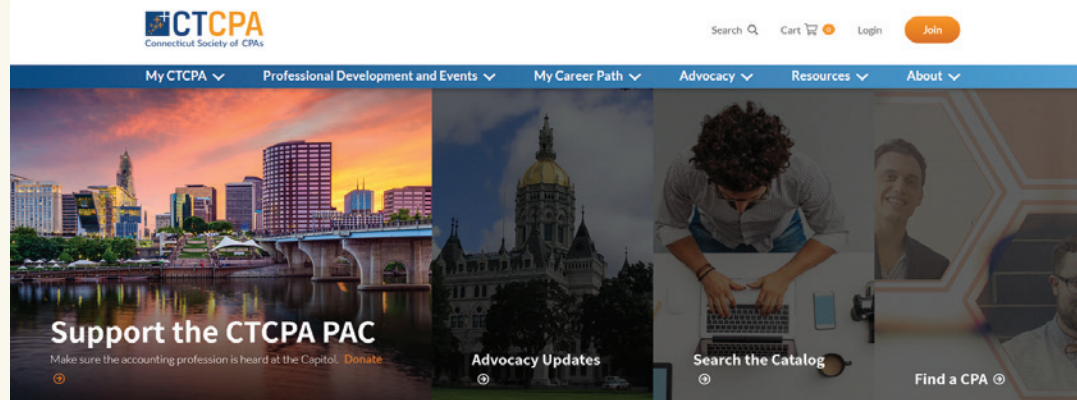


New CTCPA Website Brings Enhanced User Experience

The next time you visit www.ctcpas.org, you'll see our brand-new, state-of-the-art website – the culmination of more than a year of planning, testing, and design to bring you the best possible CTCPA online experience. We partnered with digital agency Imarc out of Boston for the project; Imarc is the driving force behind almost half of the CPA association websites nationwide.

Among the upgrades you'll see are:

- A more intuitive, easier-to-navigate event catalog, program registration, and membership renewal.
- The My CTCPA hub, where at-a-glance you'll be able to access the online communities and member rosters for your CTCPA groups, select your areas of interest, update your company or personal information, and more.
- The My Professional Development hub, where you can see your upcoming program registrations, access eMaterials, and use the CPE Tracker to download transcripts and attendance certificates.
- Streamlined company administrator functionality to allow a single user at your company to more easily register multiple individuals for programs, update your company's roster, access eMaterials, and manage employees at multiple office locations.



We piloted a collaborative coding project to bring you more.

In creating the site, we were able to get in on the ground floor as one of two CPA associations piloting a “shared platform” for back-end code. Each association's site will still have its own custom look, feel, resources, and content, but the database integration and e-commerce experience will be shared. This has some key benefits for our members:

- If Connecticut users are seeking new functionality or enhancements, we can partner with other states to share in the development costs.
- At the same time, we will be able to learn about and opt-in to enhancements developed by other associations.

As one of the founding states of this collaboration, we were able to have a large amount of input and worked to create an extremely user-friendly experience for our members.

Do you have feedback or questions about the site? We'd love to hear from you! Please reach out to me or Caitlin Bailey O'Neill at webmaster@ctcpas.org or give us a call: 860-258-4800 and press 3.



See you next issue,

Kirsten Piechota, Managing Editor

CTCPA Bylaws Vote Opens May 7: Share your voice and be part of the process!



Last year a Bylaws Committee was assembled and began meeting to consider and officially propose several changes to the CTCPA bylaws. Many of the modifications were first suggested by the CTCPA Strategic Planning Committee as it conducted a thorough review of the current bylaws to find provisions where the organization should consider changes.

Who can vote?

Only Certified and International Members in good standing may vote on the proposed amendments.

What is needed for a proposal to pass?

We need at least 10 percent of eligible voting members to participate in order for a vote to be considered valid. For an amendment to pass, the vote must carry a two-thirds favorable majority.

How do I cast my vote?

We will send each voting member an electronic ballot via email as soon as voting opens. You can also cast your vote online by visiting www.ctcpas.org/bylaws between Friday, May 7 and Wednesday, June 30, 2021.

www.ctcpas.org/bylaws

Bylaws Committee Members

Paul Iannone

Paul N. Iannone, Attorney at Law LLC

Camille Murphy

Murphy & Company, LLC

Stacey Curran

Whittlesey

Marissa LaBelle

RSM US LLP

Mary Anne Milner

General Dynamics Electric Boat

Proposed Amendments

Proposal

Change from Audit to No Less Than Review

This proposal suggests that the CTCPA's annual financial statements be subject to an attestation engagement by an independent firm at a level no less than a review. It is unclear when the CTCPA bylaw requiring an audit was last reconsidered. We know the CTCPA was organized in 1909, and a review-level engagement was not an option until 1978. The CTCPA has no regulatory requirement for an audit of its financial statements.

Proposal

Administrative Changes, Clarifications

The bulk of the proposed changes are simple rewrites to provide clarification, fix conflicts, correct grammatical errors, or make other small updates.

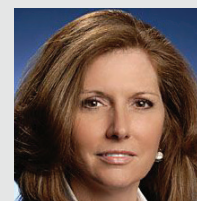
Proposal

Increasing Board of Directors Numbers, Terms

To increase continuity and collaboration within the organization, the Strategic Planning Committee (SPC) suggested changing the Board of Directors' terms from one year to two years, as well as increasing the number of board members from seven to nine so that there are enough individuals to serve on various specialized committees and work collaboratively with the CTCPA Advisory Council.

(continued on next page)

Members Weigh in on the Proposals



Marie Benedetto

CTCPA President
Innovative

Business Solutions

“Remaining relevant is the driving force behind all the programs, advocacy initiatives, and opportunities that the CTCPA delivers for you.

To remain relevant, adaptation is required. The bylaws have undergone various modifications over the years and were last revised in December of 2012.

Not only have times truly changed, but the pace of change has been exponential. I implore you to make yourself familiar with the proposed bylaws changes that will transform the CTCPA to better serve our members, the profession, and communities we serve. These changes will ensure we solidify our past, incorporate our present, and revolutionize our future.”

Proposal

Membership Category Modifications

Professional Colleagues

As CPAs' roles continue to change, members work with non-CPA professional colleagues more and more with each passing day. Firms are rapidly growing their advisory services and employing a broader range of professionals. CPAs working in finance and business frequently serve in executive management roles, working alongside colleagues with varied specializations to make strategic decisions for their organizations. As a result, forming meaningful relationships with a broader range of professionals is more important than ever.

While we currently offer an Associate membership category, it only allows for a very narrow group of non-CPAs who work directly under the supervision of a CPA to join the CTCPA. Several of the SPC's eight subcommittees found the current membership structure too restrictive to specific groups of professionals who would be valuable resources to other members.

The Professional Colleagues membership category could include attorneys, paraprofessionals, technology experts, governmental officials, and others who CPAs regularly collaborate and work with, creating a more robust membership with a deep bench of knowledge and experience.

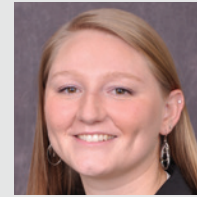
Like Associates, Professional Colleagues would not have voting rights.

Student Members

While in the current bylaws those who apply to be Students are not considered members of the CTCPA, in practice and in the documents the society has been distributing for years, those individuals are considered members. This proposal reflects our current practice and makes those who qualify and join as Student Members official members of the CTCPA. **Student Members would not have voting rights.**

This modification also reduces from five to one the number of years after graduation that an individual may maintain their Student Member status, but continues to permit the Board of Directors chair to extend that status one additional year if the chair chooses.

The final proposed modifications to Student Members concerns changes to modernize and streamline the application process. First, students would be permitted to submit electronic applications, and second, the requirement that the Board of Directors vote on Student Member applications would be removed.



Amber Moore
CTCPA Advisory
Council Chair
Goldblatt Bokoff, LLC

“No organization can afford to stick to the status quo – it is imperative that we adapt, push, and innovate to survive and thrive. That is precisely what the CTCPA is doing through this bylaws revision.”

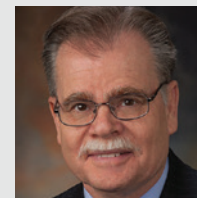
As a member working at a small firm, expanding CTCPA membership to include professional colleagues such as attorneys and technology experts will allow my firm and associates to make connections we need to help our business and our clients grow and thrive.”



Brian Kelleher
Strategic Planning
Committee Chair
and CTCPA
Past President
*Fiondella, Milone
& LaSaracina LLP*

“The Strategic Planning Committee identified and recommended to the Bylaws Committee several modifications to our leadership and membership structures to bring members and their organizations more value and relevance.

As accounting and finance teams continue to expand into strategic and advisory services, the proposed expanded membership categories will allow our team members outside of traditional tax and audit roles to take advantage of vital CTCPA resources and engagement opportunities.”



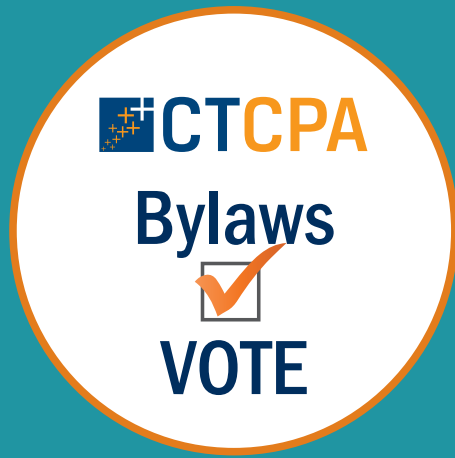
Paul Iannone
Bylaws Committee
Chair and
Strategic Planning
Committee Member
Attorney at Law

“A primary goal of the Bylaws Committee was to reflect in the proposed bylaws the vision and future direction of the CTCPA in alignment with the outcomes of the Strategic Planning Committee. The Bylaws Committee also strived to modernize the bylaws to be aligned with current trends of professional membership organizations. I am confident that the proposed changes accomplish these goals, i.e., to strengthen the viability of the CTCPA so that it can continue to deliver high quality services to members for many years into the future.”



We need at least 10 percent of eligible voting members to participate in order for a vote to be considered valid.

For an amendment to pass, the vote must carry a two-thirds favorable majority.



Cast your ballot at
www.ctcpas.org/bylaws.

A red-lined version of the bylaws and a list of pros and cons will be made available on the CTCPA website and emailed to all voting members in advance of the vote.



Brian Reilly
CTCPA
President-elect
Travelers

“As a leader in a multinational company and a former Big 4 partner, I understand the challenges finance and accounting professionals face as we adapt in a rapidly changing business landscape.

These bylaws proposals will bring our organization modernized student membership to ensure we are filling the pipeline and supporting the future of the profession, a new membership category to allow more robust interactions with professional colleagues, and an expanded leadership structure to ensure we have the talent we need to collaborate and move our organization forward.

If you are a Certified or International voting member, I encourage you to review the proposals, ask questions if you have them, and take a moment to cast your affirmative vote.”

WHERE EMPLOYERS GO FOR ADVICE IN CONNECTICUT

KAINEN
ESCALERA
AND
MCHALE^{PC}

LABOR, EMPLOYMENT & EDUCATION LAWYERS

Your workplace is our business.™

21 Oak Street, Suite 601
Hartford, CT 06106-8003
(P) 860-493-0870
www.kemlaw.com



Advocacy Update

By Bonnie Stewart, CTCPA Executive Director

2021 Legislative Session Addresses a Number of Issues Relevant to CPAs

This year’s legislative session brought a number of challenges, both in the issues that were addressed and the fact that most legislators and their staffers have been working remotely. Despite the challenges, we successfully continued to work to represent and defend the profession. As always, things can and do change very quickly.

The Connecticut State Legislature is scheduled to adjourn on June 9. Below are some of the highlights as of press time. We will continue to update you throughout the session.

Proposed Changes to Regulations for CPAs – Regulation PR2019-027 would adopt the AICPA Code of Conduct, permit continuous testing, and makes additional modifications to the regulations that both the CTCPA and

NASBA have requested to ensure that Connecticut is ready for the new CPA Exam that will result from the CPA Evolution movement. The public comment period ended on March 18.

Convenience Tax – PA 21-3 ensures that Connecticut residents will not face double taxation on their 2020 taxes. Connecticut residents will instead receive a credit against their Connecticut personal income taxes. This credit will be for taxes paid in the other state(s) where that employee – due to COVID-19 – is now working remotely in Connecticut versus their typical work state outside Connecticut.

Changes to the Department of Consumer Protection’s Licensing and Enforcement Statutes – HB 6100 makes several changes to the pub-

lic accountants’ statutes, including (1) permitting individuals who have earned the needed college credits, but have not yet graduated, to apply to take the CPA Exam; (2) mandating licenses be renewed online; (3) requiring CPAs retain records for a minimum of seven years, unless federal law requires a more extended period; and (4) bringing Connecticut statutes concerning the prohibitions on commissions and contingency fees in line with the AICPA Code of Ethics. This bill currently awaits action by the General Law Committee.

Noncompete, Exclusivity, and Non-Solicitation Agreements – SB 906 significantly restricts the use of non-compete, exclusivity, and non-solicitation agreements. The measure is problematic for several reasons, one of which is that while it tries to address conflict of interest by referencing “laws,” it does not protect CPAs as the AICPA Code of Ethics has not been codified in Connecticut. House Bill 6379 is similar to SB 906.

Privacy Bill – SB 156 and SB 893 mandate businesses disclose the proposed use of any personal information, grants consumers the right to discover what personal information businesses possess, as well as the ability to opt-out of the sale of personal information. CTCPA is part of a coalition working to address our concerns with these measures. It is believed the final proposal will be similar to the data privacy bill that was recently adopted in Virginia. The measure awaits action by the General Law Committee.

Property Tax Uniformity – We have been advocating to standardize the Connecticut business personal property tax procedures, timelines, and forms to allow for consistent processes throughout the state. We are using this year to educate legislators about our proposals, with an eye toward introducing a bill next year.



Universal
Connectivity
your link to your world®

Better Connected

Work From Anywhere

Bring your team and who they serve

Closer Together

Get more from your Phone System

866.808.1412

UniversalConnectivity.com

2021 CTCPA Annual Meeting



Featuring Keynote Speaker
Mauro F. Guillén
Author of *2030: How Today's
Biggest Trends Will Collide and
Reshape the Future of Everything*

Monday, May 10 • 9:00-10:30 a.m. • Virtual Program

Register at www.ctcpas.org/annualmeeting.

Join us for our flagship event, the CTCPA Annual Meeting, which will once again be a virtual program free to members to allow everyone to join together and celebrate the profession and our exceptional members.

Keynote speaker **Mauro F. Guillén**, author of *2030: How Today's Biggest Trends Will Collide and Reshape the Future of Everything*, is one of the most original thinkers at the Wharton School, where his presentation on global market trends has become a permanent feature of more than 50 executive education programs annually.

Professor Guillén will take us through an enlightening analysis of the fundamental demographic, economic, and technological trends rapidly remaking the world – and now accelerating under the global impact of the COVID-19 pandemic.

Become a Sponsor!

Gold Firm/Company Sponsorship: \$1,000
Silver Firm/Company Sponsorship: \$500

To reserve your sponsorship, contact:
Liz Frazza • lizf@ctcpas.org • 860-258-0220

Event Sponsor



PACE PROFESSIONAL SERVICES, LTD.

Gold Sponsors



EXPERIENCE THAT COUNTS
ASSURANCE • TAX • ADVISORY SERVICES



Silver Sponsors





From the Executive Director

Adjusting to Our Hybrid World

It's no secret that COVID-19 has completely transformed our world, or, more accurately, accelerated a number of changes that were already in motion.

Take virtual member meetings and education, for example. Pre-2020, we had already ramped up our efforts to simulcast our conferences and offer many courses via livestream or webinar. The year of COVID brought us to 100% virtual in a matter of days. While we certainly look forward to and are planning for the days when we can welcome you to membership and educational events in person, virtual and hybrid programs are also here to stay. Rest assured that we will continue to work to bring you opportunities to best take advantage of your member benefits in the modes that work for you.

Meeting and education delivery aren't the only transformations that started coming faster because of the pandemic. Many of you have told us that your hiring has transformed as well. If your company needs to engage consultants or employees with specialized skills who are based outside of your geographic area, you've learned how to almost seamlessly bring them on as members of your team.

Audits, peer reviews, consulting, and tax work are all happening successfully by engaging new technology or expanding on virtual capabilities. Regulatory bodies have made several temporary rule changes – for example, to more easily allow for performing audit work virtually – and we expect there will be additional changes to make many of these modifications permanent.

The pandemic didn't change what was happening in so many aspects our world – it simply sped it up. As we move toward herd immunity, many will be transitioning from working virtually to a more hybrid model. The CTCPA will be here to help you navigate every step of the way. The profession needs to be future-ready, and we will continue to bring you what you need to know on trends in technology, professional issues, and changes to laws and regulations.

And speaking of transformation, this spring brings exciting times for the CTCPA as we conduct our long-awaited bylaws vote, designed to bring our organization and its membership structure in line with today's professional environment. You can find more details on page 5.

As always, please reach out with any questions or ideas – I truly value member input and feedback.

Best,

Bonnie Stewart, Executive Director

2021 CTCPA Annual Meeting

Official Notice of the 2021 CTCPA Annual Meeting

In accordance with the bylaws, notice is hereby given that the annual meeting of the Connecticut Society of Certified Public Accountants will be held virtually on Monday, May 10, 2021 at 9:00 a.m. The election and installation of the 2021-2022 Board of Directors will take place at that time.

The report of the Nominating Committee is as follows:

Brian Reilly of Travelers, President-elect for 2020-2021, will assume the presidency,

Michael Maksymiw Jr. of Marcum LLP for President-elect,

Katherine Donovan of Whittlesey for Treasurer,

Mark M. Wynn of Weinschel, Wynn & Associates LLC for Secretary,

Amber Moore of Goldblatt Bokoff LLC for Advisory Council Chair,

Kevin Lawlor of Fairfield University for Member-at-Large,

Carrie Zimyeski of Zackin Zimyeski Sullivan CPA LLC for Member-at-Large.

Other nominations may be made in accordance with Section 6.4 of the CTCPA bylaws.

The full proposed leadership slate is available at www.ctcpas.org/nominees and on page 30 of this issue.

Sincerely,
Michael Maksymiw Jr., CTCPA Secretary
Marcum LLP



We salute bravery in action

Merrill proudly supports and thanks the military men and women of Connecticut for their courageous and patriotic service to the United States of America.



The Horton Team

Barnaby W. Horton, CIMA®

Senior Vice President

Wealth Management Advisor

Portfolio Manager

860.728.3526 • barnaby_horton@ml.com

Merrill Lynch Wealth Management

185 Asylum Street

City Place II

14th Floor

Hartford, CT 06103

fa.ml.com/thehortonteam



Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation ("BofA Corp."). MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BofA Corp.

Investment products: **Are Not FDIC Insured** **Are Not Bank Guaranteed** **May Lose Value**

The Bull Symbol and Merrill are registered trademarks of Bank of America Corporation.

CIMA® is a registered service mark of the Investment Management Consultants Association dba Investments & Wealth Institute.

© 2021 Bank of America Corporation. All rights reserved.

MAP3058236 | AD-02-21-0892 | 470953PM-0720 | 02/2021



Engage. Connect. Progress.

VIRTUAL Member Programs

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

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

All of our in-person programs have been moved to an online format. We are pleased to offer the same high-quality meetings and programs you've come to expect from the CTCPA virtually. We will resume in-person programming when it is safe to do so and look forward to seeing you then.



Technology Breakfast Roundtables

The Technology Committee is here to help all members with virtual work, online software, and anything else you're dealing with technology-wise. Bring your questions for these informal discussions.

Office 365 – Organizing Your Team and Working Smarter

Thursday, May 20 • 8:00am - 9:30am

Sneak Preview of the 2021 CTCPA Technology Conference

Thursday, June 10 • 8:00am - 9:30am



Federal Tax Committee Meeting Tuesday, April 27 • 8:30am - 10:30am

The Federal Income Taxation Committee is a team of tax professionals who work together to educate members on changes and nuances of federal tax laws and/or regulations affecting individuals, corporations, and pass through entities.



Governmental Accounting and Auditing Committee Meeting Tuesday, April 27 • 8:30am - 10:00am

Join group members who include both public sector finance professionals and those who serve them in public accounting to discuss developments, new regulations, and compliance issues.



Employee Benefit Plans Committee Meeting

Wednesday, April 28 • 8:30am - 10:00am

Join us for a friendly, interactive meeting including roundtable discussion of changes affecting employee benefit plans, auditors, and employers. The group includes diversified professionals like auditors, actuaries, third party administrators, and attorneys.



Accounting, Auditing & Financial Reporting Committee Meeting

Thursday, May 6 • 8:30am - 10:30am

We will be discussing current issues and any new accounting or auditing guidance released by standard setters. This group is also focused on reviewing and responding to exposure drafts, enhancing relationships between the CTCPA and regulatory bodies, and identifying and disseminating emerging issues to the membership.



Not-for-Profit Organizations Committee Meeting

Tuesday, May 18 • 8:30am - 10:30am

Attendees include those who work in the not-for-profit field and those who have not-for-profit clients. We welcome those with an interest, regardless of career stage or expertise.

CTCPA Committees and Groups

Take advantage of the networking and idea-sharing you've come to expect from the CTCPA. Many of our committees and roundtables were already offering online meeting participation and continue to do so, and each group also has an accompanying online community.

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



Accounting, Auditing, & Financial Reporting Committee

Discuss exposure drafts and enhance relationships with standard-setters.
Contact: Cindy Panioto • cindy@ctcpas.org



Diversity, Equity, and Inclusion Initiative

Promote diversity and inclusion within the profession and at our organizations.
Contact: Cindy Panioto • cindy@ctcpas.org



Educators FOOD Group

Discuss hot topics in this candid, conversational "For Our Own Development" (FOOD) group.
Contact: Alyssa Boerenco • alysab@ctcpas.org



Employee Benefit Plans Committee

Discuss issues affecting benefit plans, program audits, and employers.
Contact: Lisa Bugryn • lisab@ctcpas.org



Fairfield County Chapter

Meet for networking and education in Fairfield County locations.
Contact: Cindy Panioto • cindy@ctcpas.org



Federal Taxation Committee

Share ideas, issues, and best practices and build relationships with legislators and regulators.
Contact: Aubrey Bates • aubreyb@ctcpas.org



Finance Professionals in Industry Group

Explore regulatory, compliance, and management issues.
Contact: Cindy Panioto • cindy@ctcpas.org



Financial Institutions Committee

Share trends, regulatory and legislative developments, and new pronouncements.
Contact: Bonnie Stewart • bonnies@ctcpas.org



Golf Committee

Support Accounting Scholarship Foundation scholarships/grants by helping plan our annual golf tournament.
Contact: Liz Frazza • lizf@ctcpas.org



Governmental Accounting & Auditing Committee

Talk FASB, GASB, and single audits with public sector and audit professionals.
Contact: Lisa Bugryn • lisab@ctcpas.org



Investment Committee

Oversee the CTCPA's investment portfolio and report to the Board of Directors.
Contact: Julie McNeal • juliem@ctcpas.org



Membership Committee

Recruit new members and ensure that membership is a rewarding experience.
Contact: Alicia Strong • alicias@ctcpas.org



New & Young Professionals Cabinets (Hartford/Fairfield)

Plan programs and volunteer opportunities for members aged 35 and younger.
Contact: Alicia Strong • alicias@ctcpas.org



Not-for-Profit Organizations Committee

Focus on accounting, taxation, and financial reporting for not-for-profits.
Contact: Liz Frazza • lizf@ctcpas.org



Peer Review Committee

Stay ahead of changing standards and explore the peer review market niche.
Membership by CTCPA presidential appointment.
Contact: Julie McNeal • juliem@ctcpas.org



Professional Ethics

Investigate ethics complaints and maintain the Code of Professional Conduct.
Membership by CTCPA presidential appointment.
Contact: Lynette Lindner • lynette@ctcpas.org



Southeastern CT Chapter

These networking and educational meetings are held in locations across Southeastern Connecticut.
Contact: Bonnie Stewart • bonnies@ctcpas.org



State Taxation Committee

Navigate the regulatory and legislative aspects of Connecticut tax compliance and connect with elected leaders.
Contact: Alyssa Boerenco • alysab@ctcpas.org



Technology Committee

Ask and answer questions with technology experts at our monthly breakfast roundtables.
Contact: Cindy Panioto • cindy@ctcpas.org



Trust, Estate, & Gift Taxation Committee

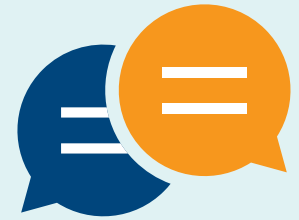
Coming this spring! Connect with colleagues in this specialization.
Contact: Bonnie Stewart • bonnies@ctcpas.org



Valuation, Forensic, & Litigation Support Group

Connect with other experts on legal considerations, witness reports, testimony, and more.
Contact: Liz Frazza • lizf@ctcpas.org

CTCPA Connect



Hello!

CTCPA Connect is an online member community that allows you to ask and respond to questions, collaborate, and share with fellow members online.

Login at www.ctcpas.org/connect to join a group and start the conversation. If you're already a member of a CTCPA group, you are automatically a member of that group's Connect community.

To make sure you receive group notifications via email, login to www.ctcpas.org/connect and click on "My Account" to set your email preferences.

www.ctcpas.org/connect



Participate via email!

Once you have logged in and joined the groups that interest you, you'll be notified of all new group discussions via email. You can even respond to conversations right from your email inbox on your desktop or mobile device.

You can set your notification settings for immediately, daily, or weekly digest for each group.

CTCPA Women

An awards program celebrating exceptional female CPAs.



“We don’t need our male counterparts to give up their seat at the table. We need them to scootch over. We need a bigger table.”

CTCPA Women Keynote Speaker
Kimberly Ellison-Taylor
Global Technology and Financial Leader and Past Chairman – AICPA

The second-annual CTCPA Women program honored female leaders in the profession for their contributions and commitment to an evolving field.

The winners represent a diverse group of Connecticut women, from a CFO who oversees the finances of a \$42 million nonprofit to an accountant who went back to school to earn her CPA while her sons were in school; from a managing partner who manages leadership strategies for 1,100 accounting professionals to a CPA who delivered the valedictory address in graduate school. Each honored woman navigated her path to success by working hard and staying true to the ethics of the profession.

Thank you to the almost 150 individuals who joined us for the program and a successful round of pre-program networking sessions. Following an inspiring address from keynote speaker **Kimberly Ellison-Taylor**, Global Technology and Financial Leader and Past Chairman – AICPA, Master of Ceremonies **Margaux Farrell** of FOX61 News presented the awards.

Executive Sponsors

Deloitte.

MERRILL 
 A BANK OF AMERICA COMPANY

The Horton Team

Media Sponsor

HARTFORD | newhaven**BIZ**
 HB BUSINESS JOURNAL

CTCPA Member Gold Sponsors

ANDERSEN.

CohnReznick 
 ADVISORY • ASSURANCE • TAX

ionBANK

MARCUM
 ACCOUNTANTS • ADVISORS

RSM

CTCPA Member Silver Sponsors

BUILDING THE FUTURE - TOGETHER

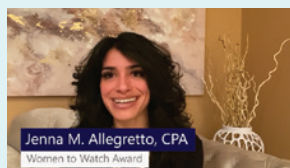

KPMG

PKF
O'CONNOR DAVIES
 ACCOUNTANTS AND ADVISORS

rh Robert Half®

We asked our honorees, “What does your role in the accounting profession mean to you?”

Watch their inspiring responses at www.ctcpas.org/CTCPAWomen or on YouTube at www.youtube.com/ConnecticutCPAs.



Distinguished Service Award



Susan Brosseau, CPA

Chief Financial Officer at Ädelbrook Behavioral and Developmental Services

Susan Brosseau was inspired to join the accounting field 35 years ago because she saw many opportunities to work with a variety of clients, as well as the chance for swift advancement. Now the Chief Financial Officer at Ädelbrook Behavioral and Developmental Services, Susan enjoys strategic planning and other senior leadership activities.



Dana M. Silva

Chief Accounting Officer & Corporate Secretary at Ion Bank

Throughout a three-decade career in accounting, Dana Silva has been able to experience all levels in the field, from managing an accounting department to leading critical projects. She has also been an active team member for conversions, mergers, and acquisitions. Her co-workers admire her unmatched dedication and perseverance as Ion Bank's Chief Accounting Officer & Corporate Secretary.



Heather Ziegler

Stamford Managing Partner at Deloitte & Touche LLP

For Heather Ziegler, problem solving was critical not only to succeed, but in some cases survive growing up in Fairbanks, Alaska. "This beautiful but challenging environment helped shape who I am today," she said. "Facing challenges head on and navigating through creative solutions is part of my roots and very much influences my client service approach." With more than 24 years of experience, Heather now oversees 1,100 professionals at the Stamford Deloitte and Touche, LLP office.

Event Planning Committee

Thank you to these members for their hard work planning the event and serving as the committee to select our honorees.

Shanita Booker
The Hartford

Mary Manfredi, CPA
General Dynamics
Electric Boat

Christa Clark, CPA
RSM US LLP

Amber Monaghan, CPA, MSAT
Marcum LLP

Angel Li, CPA
FML LLP

Women to Watch Award



Jenna M. Allegretto, CPA

Senior Manager, Assurance Services at Marcum LLP

Jenna Allegretto comes from a family of accountants, following both her dad and brother in graduating from Fairfield University and entering the accounting profession. Jenna refers to accounting as the language of business, where women have made significant strides. "Now more than ever, women are proving that there is room at the table for all of us. It is up to us as female business leaders to continue creating a culture for women to succeed in the profession and, most importantly, champion other women who may be following in our footsteps," she said.



Anne M. Comer, CPA

Director of Operations at CRC Group

Anne Comer never planned on becoming a CPA until she married her boss, Thomas Comer, CPA. She worked as his office administrator before going back to college full time when their sons, Evan and Jonathan, were in high school and middle school, respectively. It took her two years to complete three years of study, graduating summa cum laude from Central Connecticut State University. Within a few years of working at CRC Group, Anne was promoted to Director of Operations to oversee strategic initiatives for the \$9 billion public company.



Erica Czajkowski

Audit Senior Manager at Deloitte & Touche LLP

Erica Czajkowski was inspired to join the accounting field by a strong female role model – her mother – who was a tax partner at a regional accounting firm. Now Erica is committed to helping other women excel in a field with countless opportunities. "Erica is dedicated and passionate in all that she does. She is passionate about the people at Deloitte, which is demonstrated by her coaching, promotion of others, and leading the inclusion council," said colleague and nominator Paul Guzzardi.



Marissa R. LaBelle, JD, CPA

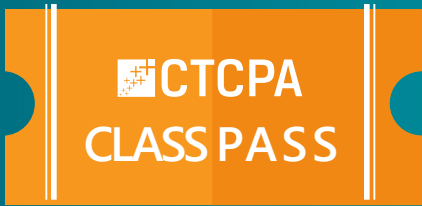
Staff Attorney at RSM US LLP

Marissa LaBelle is a high achiever who finished college in less than four years and earned her JD while working as a full-time auditor at RSM US LLP. To her peers, Marissa is a natural leader and role model. She progressed rapidly in her roles and was promoted quickly to a manager because of her technical expertise, client capabilities, and talent. Today, she is part of a team of in-house attorneys that defends professional liability cases brought against the firm, focused largely on the audit practice.

Professional Development

▶ Register for these programs and hundreds more at www.ctcpas.org/register.

Date	Title	Course Code	Member Standard/Early	Nonmember Standard/Early	CPE Hours	Location
5/13	Ethics: 50 Shades of Gray	50SHADES	\$170/\$150	\$235/\$215	4	Online
5/18-19	CTCPA Governmental Accounting and Auditing Conference	GAA	\$304/\$269	\$429/\$394	8	Online
5/19	Critical Business Risks — Identifying Your Blind Spots (Afternoon Session)	CL4CBRU	\$160/\$140	\$225/\$205	4	Online
5/19	Controller's Update: Today's Latest Trends (Morning Session)	CL4SKSB	\$160/\$140	\$225/\$205	4	Online
5/20	Professional Ethics for Connecticut CPAs (Morning Session)	ETHCT4-A	\$170/\$150	\$235/\$215	4	Online
5/24	Compilations, Reviews, and Preparations: Engagement Performance and Annual Update	CRAU	\$304/\$269	\$429/\$394	8	Online
5/24	Focus on Engagement Quality: How to Avoid Deficiencies in Peer Reviews	ENQ8	\$304/\$269	\$429/\$394	8	Online
5/25-26	CTCPA's Employee Benefit Plans Conference	EBP	\$304/\$269	\$429/\$394	8	Online
5/26	Preparing Not-For-Profit Financial Statements under ASU No. 2016-14	ENFP	\$304/\$269	\$429/\$394	8	Online
5/27	Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know (Morning Session)	CL4INRR	\$160/\$140	\$225/\$205	4	Online
5/27	The Bottom Line on the New Lease Accounting Requirements (Afternoon Session)	CL4LEAS	\$160/\$140	\$225/\$205	4	Online
5/27	Governmental and NFP Accounting and Auditing (Morning Session)	CL4GNP	\$160/\$140	\$225/\$205	4	Online
5/27	Real-World Frauds Found in Not-for-Profits (Afternoon Session)	CL4RFNF	\$160/\$140	\$225/\$205	4	Online
5/27	Fiduciary Income Tax Returns – Form 1041 Workshop with Filled-in Forms	1041-LS	\$304/\$269	\$429/\$394	8	Online
6/2	Annual Update for Accountants and Auditors	AUAA	\$304/\$269	\$429/\$394	8	Online
6/2	What Fraud Schemes Exist in Your Organization	FSEO	\$304/\$269	\$429/\$394	8	Online
6/3	The Best S Corporation, Limited Liability, and Partnership Update Course	BCPE	\$304/\$269	\$429/\$394	8	Online
6/4	Non-GAAP Financial Statement Options: Cash, Modified Cash, and Tax Basis (AM or PM Session)	CMT4	\$160/\$140	\$225/\$205	4	Online
6/4	The Best Individual Income Tax Update Course by Surgent	BITU-A	\$304/\$269	\$429/\$394	8	Online
6/7	Audits of Employee Benefit Plans Subject to ERISA	AURBP	\$304/\$269	\$429/\$394	8	Online
6/7	Required Minimum Distributions: Compliance and Planning (Morning Session)	RMD4	\$160/\$140	\$225/\$205	4	Online
6/7	Social Security and Medicare: Planning for You and Your Clients (Afternoon Session)	SSR4	\$160/\$140	\$225/\$205	4	Online
6/8-9	CTCPA's Accounting, Auditing and Reporting Conference	AAC	\$304/\$269	\$429/\$394	8	Online
6/8	Larry Stein's 2021 Guide To IRAs	IRA21	\$304/\$269	\$429/\$394	8	Online
6/9	Larry Stein's 2021 Guide To Trusts, Estates, Gifts, And Income Tax Planning For Surviving Spouses, Heirs And Beneficiaries	TESH	\$304/\$269	\$429/\$394	8	Online
6/10	Diversity, Ethics and High Performing Cultures – Using Ethics as a Lever to Build a Culture of Diversity and Inclusion	STEUS	\$170/\$150	\$235/\$215	4	Online
6/10	Applying the Uniform Guidance in Your Single Audits	INUG	\$304/\$269	\$429/\$394	8	Online
6/10	Larry Stein's 2021 Guide To Small Business Taxes ("S", "C", "LLC", "LLP")	SMBT	\$304/\$269	\$429/\$394	8	Online
6/11	New Auditor Report Standards: SAS 134-140 (Morning Session)	NARS4	\$160/\$140	\$225/\$205	4	Online
6/11	Advanced Trust Issues: A Roadmap for Success in An Increasingly Complex Area (Morning Session)	TRS4	\$160/\$140	\$225/\$205	4	Online
6/14	Fiduciary Accounting and Tax Issues of Estates and Trusts	FACT	\$304/\$269	\$429/\$394	8	Online
6/14	Ethics and Professional Conduct: Updates and Practical Applications (Morning Session)	CL4GRE	\$160/\$140	\$225/\$205	4	Online
6/14	Yellow Book: Application of GAGAS Principles (Afternoon Session)	CL4YBAP	\$160/\$140	\$225/\$205	4	Online
6/15	Construction Contractors: Accounting Considerations (Morning Session)	CL4CACT	\$160/\$140	\$225/\$205	4	Online
6/15	Construction Contractors: Auditing (Afternoon Session)	CL4CAUD	\$160/\$140	\$225/\$205	4	Online
6/15	Auditing Not-For-Profit Entities: Superior Skills for an Effective and Efficient Audit	ANFP	\$304/\$269	\$429/\$394	8	Online
6/16-17	CTCPA's Technology Conference	TEC	\$304/\$269	\$429/\$394	9	Online



Save on quality professional development programs and support your local membership organization:

Introducing the 40- or 80-Hour Class Pass!

New this year, purchase your professional development program credits in advance and enjoy significant savings. This year's pass applies to seminars, conferences, webinars, and livestream programs now through March 31, 2022.

>> **Learn more and purchase at www.ctcpas.org/ClassPass.**

Spring Conferences

>> www.ctcpas.org/conferences

We're connecting you with experts and thought leaders from around the state and around the country. Get the guidance, updates, and advice you need ... from wherever you are.



Governmental Accounting and Auditing Conference

Tuesday, May 18 - Wednesday, May 19

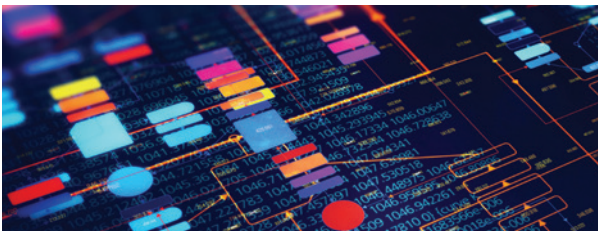
Online • 8 Credits • Keyword/Express Code: GAA



Employee Benefit Plans Conference

Tuesday, May 25 - Wednesday, May 26

Online • 8 Credits • Keyword/Express Code: EBP



Accounting, Auditing and Financial Reporting Conference

Tuesday, June 8 - Wednesday, June 9

Online • 8 Credits • Keyword/Express Code: AAC



Technology Conference

Wednesday, June 16 - Thursday, June 17

Online • 9 Credits • Keyword/Express Code: TEC



Not-for-Profit Organizations Conference

Tuesday, June 22 - Wednesday, June 23

Online • 8 Credits • Keyword/Express Code: NFP

Member PERKS and PARTNERSHIPS



Office and Professional Needs



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



Save up to 5% on auto insurance with the Northeast's premier home and auto insurance carrier.



Get affordable pet health coverage from preventive care to significant medical incidents.



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



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



Save on your professional liability insurance.



Save on Paychex's platform integrating payroll, HR, and employee benefits.



Integrity Merchant Solutions can save you (and your clients) 10-40% on credit card processing fees.



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%.



Save on Best Buy, Staples, Verizon, 1800flowers.com, and more.



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



Save up to 30% off Lenovo's entire line of PC products and accessories.

Student Loan, Tuition, and Exam Review Discounts



Refinance your or your family's student loans for a better rate – and a \$300 welcome bonus.



You (and select staff or family) are eligible for a 25% discount on tuition.

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

Discounts and Coupons

Save up to 20% or more at these and other retailers:



Get links and discount codes for these and more at www.ctcpas.org/memberperks.

CTCPA Insurance Hub

Insurance for you, your family, your employees, and even your pets!



Dental and Vision Insurance

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

For complete details, contact Mark Williams with The Health Consultants Group at 860-351-0107 or mwilliams@myhcg.com or view our Specialty Benefits Guide at www.ctcpas.org/memberperks.

More Than Just Insurance.



Home and Auto Insurance

Through our new alliance with Plymouth Rock Assurance, the Northeast's premier home and auto insurance carrier, CTCPA members are eligible for a 5% auto insurance discount from Plymouth Rock!

Get a quote by calling 833-4CT-CPAS or online through the link at www.ctcpas.org/memberperks.



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.

CYBERSCOUT®

Identity Theft Protection

Protect you, your family, and your workforce from identity theft and cyber attacks with Cyberscout's suite of protective tools and support services.

Learn more at www.ctcpas.org/memberperks. To enroll, contact Lauren Kuhn with Progressive Benefit Solutions at 203-208-4841



Professional Liability Insurance

Save money on the professional liability insurance you need.

To learn more, call Ken Gross from PACE at 1-800-453-4021 and mention that you are a CTCPA member.

Have questions or ideas? We're here to help!

We have developed strong partnerships with each of these carefully selected insurance providers. If you have questions or would like additional information, please reach out to Membership Director Cindy Panioto at cindyp@ctcpas.org or 860-258-0213 and she will help you get in touch with the right people.

If you have any ideas for additional insurance savings we can offer to CTCPA members, please share those with Cindy as well.



CTCPA by the Numbers

In our annual report issue, we bring you your top member benefits, opportunities, and perks by the numbers.

What a Year! Is There a Silver Lining?

By Marie Benedetto, 2020-2021 CTCPA President, Innovative Business Solutions



2020-21 sure has been extraordinary – no one can deny that! I am reminded of the phrase “a shot heard ‘round the world.” While that phrase became known during the American Revolutionary War, it seems fitting here as well, as vaccination efforts continue around the state. The world has indeed been affected. An outright war has ensued against a seemingly invisible enemy. Many battles have been won over the course of this year to transform us all into resilient beings, now revolutionized.

While we all take a well-deserved pause after such an exhausting marathon, let’s encourage each other to see the silver linings. The fortitude that got you here will carve the path forward with continued meaning and purpose. But let’s be honest ... We didn’t do it alone.

As you look to your own organizations and even your family units, you can recognize that the resiliency of your “cohort” is due to the connectivity of your relationships and network. Often during challenging times, we must rely on each other for empathy, support, motivation, communication, persistence, and encouragement.

Your CTCPA membership organization has exemplified that unwavering support for us from day one with:

- Increased communications keeping us apprised of the daily changes of regulations, due dates, etc.
- Increased advocacy efforts to keep our professionals in the “essential” criteria and support extended professional development deadlines, while continuing to keep an eye on the ever-challenging legislative issues affecting our members and our business communities.
- Outreach programs checking in with our members to see what they need or getting a quick pulse via a survey.

- A seamless transition to livestream and/or on-demand professional development options (many of them free).
- Continuing to recognize our fearless leaders through awards programs and other virtual events.
- Consistently reaching out through social media, motivating us to connect with each other or just offering words of encouragement.

As with all organizations during this pandemic, difficult decisions had to be made. Our CTCPA internal staff was downsized significantly, yet somehow they STILL managed to continue seamless (and increased) support to our members!

The CTCPA has continued to transform to remain relevant to our members, including these ongoing initiatives:

- The new www.ctcpas.org website (now LIVE!).
- Enhancement/expansion of all-virtual curriculum and professional development programs.
- Increased focus and service to our industry members.

Mere words of thanks cannot express the gratitude for the outstanding service provided by our CTCPA staff, led by our own Executive Director, **Bonnie Stewart**. A virtual standing ovation is in order! I am honored to have served among the leaders of this organization (staff and members), and humbled to have had the opportunity to represent my peers.

We hope that the CTCPA has been your silver lining in continuing to revolutionize the support and value of our membership, providing purpose and meaning every step of the way. Let’s continue to seek silver linings together, in support of strengthening our relationships and connectivity as resilient beings!

Onward!

From the Executive Director

By Bonnie Stewart, CTCPA Executive Director



In last year's annual report issue, I talked about the steps CTCPA was taking to invest in technology and innovation to prepare us for a rapidly moving future. Even still, I never could have predicted what the year would bring for our association, our profession, and our world.

I'm grateful to report that not only did we ride out the storm, but in many ways we came out even stronger than when we went in. We know that membership dues is a discretionary expenditure, so we have spent the past year doing everything we could to increase our communications, engagement, and benefits.

Increased Communications

As soon as stay-at-home and other orders began, we made it our top priority to keep you in-the-know about what was happening the moment information became available – from executive orders to DRS and IRS extensions. Many of these items were released in the late hours of weekend nights, but you let us know that you were right there with us – working whenever and wherever you needed to – and that you appreciated the fact that we made sure you were the first to know about breaking news.

Education the Moment You Needed It

When the CARES Act and PPP, PPP2, and other packages were released, we got you the professional development you needed to sort through it all immediately. For example, our first of dozens of webinars on PPP2 was offered just two days after the economic relief package was approved by Congress.

Advocacy on Your Behalf

Several times this year we called on the Lamont administration, State Board of Accountancy, Department of Revenue Services, Small Business Administration, our federal delegation, and many others to represent our members and their interests, request changes or clarifications, and work to ensure you had the tools and information you needed.

Becoming the Firm or Accounting Department of the Future

We're bringing you tools and information to help you not only in the traditional areas of tax, audit, and accounting, but also the value-added consulting, strategic thinking, and creative problem solving to help your organizations not only survive but thrive.

The CTCPA isn't just making it through this rough time – we're rising to meet you in tackling the challenges, and we are ready for the next ones. I want to thank you all for your support, and I ask you to please continue to stand with us through your dues, professional development, and volunteer support to keep our organization strong as we move forward together.

If you have any questions, ideas, or need us to advocate on your behalf, please don't hesitate to reach out.

2020-2021 Board of Directors

Marie Benedetto
President
Innovative Business Solutions

Brian Reilly
President-elect
Travelers

Timothy Hedley
Treasurer
Fordham University, K2 Integrity

Michael Maksymiw Jr.
Secretary
Marcum LLP

Amber Moore
Advisory Council Chair
Goldblatt Bokoff LLC

Katherine Donovan
Member-at-Large
Whittlesey

Katherine Patnaude
Member-at-Large
PKF O'Connor Davies, LLP

2020-2021 Advisory Council

Amber Moore
Chair
Goldblatt Bokoff LLC

Ralph Anderson
Federal Income Taxation
*Beers, Hamerman,
Cohen & Burger*

Matthew Auth
Member-at-Large
EY

Michael Bolingbroke
Golf Tournament
Robert Half International

Matthew Boughton
Hartford County
Young Professionals
PKF O'Connor Davies, LLP

Amanda Bristol
Member-at-Large
Reynolds + Rowella

Cynthia R. Calderón
Member-at-Large
CohnReznick

Alan Clavette
State Taxation
Clavette & Company, LLC

Geoff Currie
Member-at-Large
Deloitte

Bryan Decker
Accounting, Auditing
& Financial Reporting
PKF O'Connor Davies, LLP

Michael Delaney
Member-at-Large
*Connecticut Auditors of
Public Accounts*

Guy Drapeau
Member-at-Large
Trinity College

David Flint
Governmental
Accounting & Auditing
CLA
(CliftonLarsonAllen LLP)

Anastasiya Hajek
Valuation,
Forensic, Litigation
CohnReznick

Kenneth Healy
Member-at-Large
*Diversified Financial
Solutions PC*

Bradley Hillman
Finance Professionals
in Industry
Global Steering Systems

Michael Jordan
Member-at-Large
Andersen

Alexander Kotwal
Fairfield County
Young Professionals
Marcum LLP

John Kriscenski
Educators
*Central Connecticut
State University*

Richard Madonna
Member-at-Large
Connecticut College

Mary Manfredi
Member-at-Large
*General Dynamics
Electric Boat*

Joseph Mooney
Member-at-Large
The Connecticut Hospice

Misal Panchal
Member-at-Large
*Connecticut Insurance
Department*

Randee Roucoulet
Technology
Simione, Macca & Larrow

Jennifer J. Schempp
Employee Benefit Plans
*Beers, Hamerman,
Cohen & Burger*

Todd Shelansky
Not-For-Profit
Organizations
Harper & Whitfield

Ryan Sheppard
Professional Ethics
*Knight Roller
Sheppard CPAs, LLP*

Robert Stoddard
Member-at-Large
KPMG

Vanessa Stratton
Financial Institutions
Savers Bank

Jennifer Whalley
Finance Professionals
in Industry
Amphenol Corporation

See our 2021-2022
Board of Directors
nominees and
incoming Advisory
Council appointees on
page 30.

Keeping at the Forefront of Innovation

448%

Increase in virtual participation in professional development programs in the past year.



417

Hours invested by CTCPA Board of Directors and Advisory Council members in brainstorming sessions and meetings in the past year.



1,232

Number of programs we offered this year on leveraging new and emerging technology.



Leadership Foresight Resulting in Transformation and Business Continuity

In the past several years, CTCPA leadership has chosen to make significant investments in technology and communications tools, including webinar and livestream capabilities, the CTCPA Connect online community, cloud-hosted servers and online software, and our brand-new, state-of-the-art website.

This eye toward the future has served our organization incredibly well as we have increased member access to programs, services, and tools to keep us all connected, engaged, and informed.

When the COVID-19 pandemic first hit, CTCPA operations were quickly and effectively transitioned to remote operations. Staff left the physical office on a Thursday afternoon and were up-and-running off-site through Office365, Teams, and VOIP phones by Friday morning. Professional development programs and committee meetings immediately moved to entirely virtual collaboration.

Thank you to these recent volunteer leaders, pictured at right, for your support and foresight – you have positioned our organization for success today and in the future.

Recent Presidents



2020-2021 President
Marie Benedetto
Innovative Business Solutions



2019-2020 President
Dennis Cole
Beers, Hamerman, Cohen & Burger



2018-2019 President
Susan A. Martinelli
RSM US LLP



2017-2018 President
Bradley D. Kronstat
Kron Consulting

Recent Board of Directors Members



Katherine Donovan
Whittlesey



Timothy Hedley
Fordham University, K2 Integrity



Mitchell R. Inero
Cigna



Michael P. Jordan
Andersen



Michael Maksymiw Jr.
Marcum LLP



Amber Moore
Goldblatt Bokoff LLC



Edwin R. Muenzner
Edwin R. Muenzner, CPA



Katherine Patnaude
PKF O'Connor Davies, LLP



Brian P. Reilly
Travelers



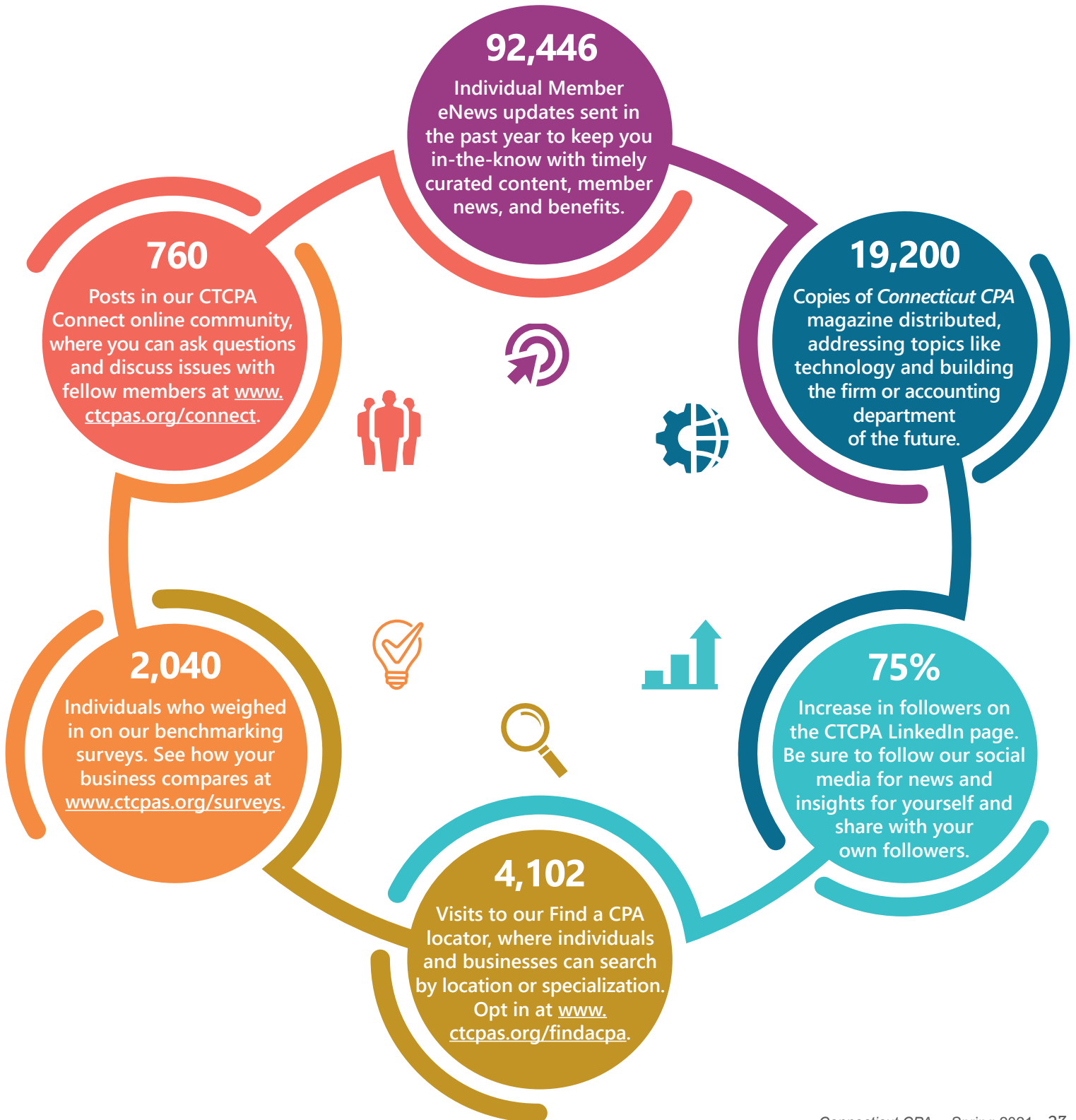
Mark Torello
Whittlesey Technology

Keeping Connected

We work 24/7 to keep you up-to-date on the local and national legislative, regulatory, and economic news you need to know.

Our communications include our popular Advocacy Update, which covers Connecticut, New England, and federal news. Member eNews regularly brings you the top stories from CTCPA, updates about fellow members, and a curated collection of timely and relevant news articles.

These regular communications are coupled with our timely legislative and regulatory alerts, which quickly bring you news you need to know as soon as it is available, such as the executive order that named finance and accounting as essential services this spring or the FASB's delay of the revenue recognition effectiveness date for private companies.



Keeping Engaged and Informed

Accounting and finance professionals dealt with rapid change and moving targets when it came to filing deadlines, client and company demands, and constant modifications to regulations and guidance in the past year.

CTCPA was here with you each step of the way, modifying our professional development, conferences, and committee meetings to bring you all virtual options, shifting program schedules in light of the extended CPE credit filing deadline

to December 31, and adding robust and timely programs the moment new information became available.

We brought you presentations and interactive discussion with leaders and subject matter experts in a broad range of topics and specializations, including accounting and auditing, taxation, business management and organization, finance, personal development, ethics, governmental and nonprofit, personnel/human resources, and much more.



7,859 Attendees at CTCPA professional development programs and special events this year.

75 Free professional development programs offered for our members this year including CONNecTion meetings, special sessions with legislators and regulators, and more, and educational committee meetings. Find groups to join at www.ctcpas.org/groups.



480 Personal emails and calls answered to help guide members through the Peer Review process.

407 Members who joined our new online communities for groups including Economic Relief Packages (PPP and More), Finance Professionals in Industry, Small Firm Roundtable, CTCPA Retirees, and Coronavirus Conversations. Join in at www.ctcpas.org/connect.



430 Programs and meetings specifically for our members in business and industry, including Finance Professionals in Industry Group meetings and professional development programs.

Addressing Today's Newest and Greatest Concerns

The COVID-19 pandemic not only brought extreme challenges to our personal and professional lives, it introduced a host of new legislation, loan and financing programs, and economic issues.


We offered in-depth programs addressing local issues including “Get the Real Answers to Your COVID-19 Questions: Vaccines, Treatments, Connecticut’s Economy and Legislative Agenda” and “Moving Forward: Business Growth and

Recovery Amid COVID-19,” as well as hundreds of webinars on the stimulus packages, PPP, and PPP2.


Through additional virtual committee meetings, new groups/online communities including Economic Relief Packages (PPP and More) and Coronavirus Conversations, and greatly increased communications, membership offered vital connections to keep you informed.



21,440
Visits to our COVID-19 hub, featuring news, guidance, and legislative and regulatory alerts for businesses and individuals, at www.ctcpas.org/coronavirus.



88
Programs to help navigate the pandemic, including financial reporting and audit implications, managing remote work, and business planning and strategic modelling.



76
Programs specifically addressing issues related to PPP loans and stimulus packages, including applications, tax implications, and case studies.



51
Breaking news alerts sent in the past year, getting new executive orders, deadline changes, and new guidance into your inbox the moment it was available.



Let's Move Forward – Together

Paychex continues to support accounting professionals during tax season and throughout the year.

- **AccountantHQ:** Manage client payroll and HR data from a single dashboard. payx.me/ahq
- **Accountant Knowledge Center:** CPE self-study courses, the 2021 online U.S. Master Tax Guide and other free online resources. payx.me/akc
- **Paychex Business Series podcasts:** Host and CPA Gene Marks talks with politicians, HR managers and business owners on legislation and best practices. payx.me/ctcpa-podcasts

Let us know how we can help **877-534-4198**



Paychex is proud to be an endorsed provider for the CTCPA.

© 2021 Paychex, Inc. All Rights Reserved. | 2/17/2021



HR | Payroll | Benefits | Insurance


Advocacy and Outreach

Not only do we work hard to defend the profession and Connecticut organizations against harmful legislation, we also connect members with legislators, standard-setters, and regulators and pursue a number of new initiatives each year. This work was especially challenging in the past year given the limitations on in-person meetings.


Nonetheless, we successfully represented our members' interests, raised issues and concerns, requested changes or clarifications, and secured additional guidance from the Department of Revenue Services, Lamont administration, state and federal legislators, State Board of Accountancy, Small Business Administration, and many others.



221,052
Individual advocacy emails sent including our bi-monthly Advocacy Update covering Connecticut, New England, and federal matters, as well as legislative and regulatory alerts.



26
Meetings CTCPA leadership attended with state and regulatory bodies (including SBOA, DCP, DRS, DOL, OPM, and State Comptroller's Office) to represent our members, raise issues, and report back to the membership.



53
Communications with our federal delegation and their staff to ensure Connecticut finance and accounting professionals and their businesses are represented on a national level.



Our political action committee ensures our voice is heard.

Our bipartisan political action committee supports Connecticut's leadership caucuses, helping to garner support for the important issues affecting the profession and Connecticut's business community. A special thanks to the many members who supported the PAC, especially these top donors:

Marie Benedetto	Michael Maksymiw Jr.
Steven Bokoff	Katherine Patnaude
Girish Chokshi	Dennis Ramey
John Kanabis	Kevin Wenig
Bradley Kronstat	

Keeping the Pipeline Full

Ensuring a strong future for the profession requires a robust focus on recruiting and engaging the next generation. We added a lunch-and-learn series for students this year to help position them for career success on resumes, building a LinkedIn profile, and virtual interview techniques.


Exam and licensure model to bring it in line with the real-world skills and knowledge today's and tomorrow's CPAs need to thrive in their professional environment.

CTCPA leaders were also engaged in in-depth discussion on the CPA Evolution project, designed to update the CPA


The CTCPA Board of Directors, Advisory Council, Educators Group, and Governmental Accounting and Auditing Committee have all met and collaborated to provide extensive feedback on various proposals.




285
Newly minted CPAs in Connecticut this year. We welcomed each of them to the profession and invited them to join the CTCPA.



\$51,500
Dollars awarded to future Connecticut accounting and finance professionals annually by the CTCPA Accounting Scholarship Foundation.



180
Hours invested by members to provide feedback on proposed changes to the CPA Exam and licensing requirements as part of the CPA Evolution project.



125
Job and internship interviews conducted by firms and companies with Connecticut's top accounting students as part of our virtual Interview Day.



Thank You, CTCPA Premier Members!

Thank you to these Premier Members for their commitment to help CTCPA stay strong today and into the future. All members will have the opportunity to support our organization with the premier membership add-on during membership renewal this spring. Learn more at www.ctcpas.org/premiermembership.

Joel Altobello

Square10 Solutions LLC

Lawrence W. Baldyga

Lawrence W. Baldyga & Co., P.C.

John A. Barbosa Jr.

John A. Barbosa Jr., CPA

Anthony F. Beatman

Amore and Beatman CPAs, LLC

Marie L. Benedetto

Innovative Business Solutions

Kyle S. Biddick

Adams Samartino & Company, P.C.

Mark A. Burns

Diversified Financial Solutions, PC

Tammy L. Burrell

Tomasella, Schlitter & Burrell P.C.

Paul A. Caiafa, MST

Caiafa & Company, LLC

Sandra D. Callanan

CironeFriedberg, LLP

Heather L. Capalbo

Heather L. Capalbo, CPA

Girish Chokshi

Chokshi, Mund, Raczkowski, PC

Anthony W. Cirone Jr.

CironeFriedberg, LLP

Alan J. Clavette

Clavette & Company, LLC

Dennis W. Cole

Beers, Hamerman, Cohen & Burger, P.C.

Katherine A. Donovan

Whittlesey

Sean M. Donovan

Sean M. Donovan, CPA

Ellen M. Essman

Ellen M. Essman, CPA

Louis W. Figliuzzi

Louis W. Figliuzzi

Charles J. Frago

Wolf and Company P.C.

Peter R. Fusco Sr.

O.F. Mossberg & Sons, Inc.

Steven Gagnon**Joseph A. Greco**

Better Books, Ltd.

Joseph J. Hanggi Jr.

Hanggi & Company CPAs, LLC

Sandra G. Harrison

Sandra G. Harrison, CPA, LLC

Timothy P. Hedley, Ph.D.

Fordham University, K2 Integrity

Alan B. Igdalsky

Igdalsky & Co., CPAs

Hope M. Igdalsky

Igdalsky & Co., CPAs

Milton B. Ignatius III

Milton B. Ignatius, CPA

Michael P. Jodon

CironeFriedberg, LLP

Michael P. Jordan

Andersen

Daniel R. Kaufman

Nathan Accounting Group

Bradley D. Kronstat

Kron Consulting

Edward Lemkin

Edward Lemkin, CPA

Justin M. Liskiewicz

Justin M Liskiewicz CPA LLC

Frank M. Loehmann Jr.**Michael G. Maksymiw Jr.**

Marcum LLP

Susan A. Martinelli

RSM US LLP

Robert Stephen Matfess

Robert Matfess & Co., P.C.

Joseph W. Mooney

The Connecticut Hospice, Inc.

David Moseman

CironeFriedberg, LLP

Sheila S. Moses

Moses Tax Group, P.C.

David C. Mulhall

LPL Financial Services

Stephen A. Musante

Stephen A. Musante, Jr., CPA

Richard J. Papscoe Jr.

Weiss, Papscoe & Company LLC

Dawn R. Parker

Dawn R. Parker, CPA & Associates

Uday K. Patel

Uday Patel, CPA

Katherine M. Patnaude

PKF O'Connor Davies, LLP

Richard W. Paukner

Richard Paukner &

Associates LLC

Lisa V. Peabody

Lisa V. Peabody, CPA, LLC

William R. Peck

William R. Peck, CPA

Teresa S. Polley**Edward J. Przybysz**

Edward J. Przybysz, CPA

Brian P. Reilly

Travelers

Leonard M. Romaniello Jr.

Lenkowski, Lonergan & Co., LLP

Jerry Rosenband

Jerry Rosenband, CPA, P.C.

William J. Saas

Saas Kirwan Associates

Steven J. Samela

Steven J. Samela, CPA

Robert E. Sampieri

Robert E. Sampieri, CPA

Robert J. Schless

CironeFriedberg, LLP

Teja N. Shariff

Shariff & Company

John D. Shaw

Mason, DiMarco & Shaw, P.C.

Jay Bryan Sheehy

Kamco Supply Corporation
of New England

Jeffrey C. Solomon

Marcum LLP

William D. Stout, Ph.D.

University of Louisville

Sarah Stover

Edwin R. Muenzner, CPA

Karen B. Stronk

Karen B Stronk CPA LLC

Brian Andrew Sutton

Brian A. Sutton, P.C.

Francis X. Tirelli

Finaxstrure Associates LLC

Tracey P. Toner

Moses Tax Group, P.C.

Michele M. Torres

Global Atlantic Financial Group

Pamela Walsh Torsiello

Pamela Walsh Torsiello, CPA

William H. Van Alstyne

CironeFriedberg, LLP

Robert A. Vance

Robert A. Vance, CPA

James S. Viola**Ralph A. Volpe III**

RSM US LLP

Katherine L. White

Moses Tax Group, P.C.

Mark M. Wynnck

Weinshel, Wynnck
& Associates, LLC

Karen L. Zeilnhofner

Deloitte

Catherine Zeiner

YWCA Hartford Region

Michael A. Ziebka

Budwitz & Meyerjack, P.C.

David M. Zieff

CironeFriedberg, LLP

Members Celebrate Black History Month, Black CPA Centennial

By Caitlin Bailey O'Neill, Assistant Editor

Twenty-five years after the first CPA certificate was granted in the United States, John W. Cromwell, Jr. became the first black CPA.

This year marks the 100th anniversary of that achievement, and a campaign from the American Institute of Certified Public Accountants, Diverse Organization of Firms, Inc., Illinois CPA Society, National Association of Black Accountants, Inc. (NABA), and National Society of Black CPAs, Inc. aims to honor the past, celebrate the progress, and build the future.

While diversity, equity, and inclusion efforts have been making strides in recent years, there is still much work to done. According to NABA, black CPAs account for less than one percent of U.S. CPAs.

In celebration of John Cromwell's achievements and Black History Month in February, we spoke to several CTCPA members about their experiences as black CPAs. Read their full responses at www.ctcpas.org/blackhistorymonth.



Avril Stephens
Audit & Assurance
Managing Director,
Deloitte & Touche LLP

Why is diversity key to the accounting profession and the business community as a whole?

In the United States, it took 44 years to get the first 100 black CPAs (1921-1965). In 1969, the year that I was born, nine African-Americans met in NYC to discuss the unique challenges and limited opportunity they faced in the accounting profession, which led them to form the National Association of Black Accountants. In that year, there were 136 African-American CPAs out of 100,000 in the United States.

In 2020, less than 1% of CPAs (approximately 650,000) were black, and that has not changed in 40 years. In order to meet the needs of our clients and to remain competitive globally, we all must do better. Many studies have shown that diversity, including gender and ethnic diversity, are correlated with profitability. People in diverse environments bring together ideas and experiences of other cultures and allows one to benefit from different perspectives and problem-solving approaches and leads to investments and innovations.



Muhammad Malloy
Senior Tax Associate,
CohnReznick

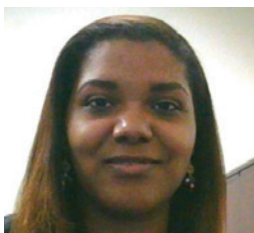
How has being black shaped who you are personally/professionally?

Being African-American in America comes with challenges. Over the past year, one of those challenges came to the forefront: racial inequality. The senseless killing of George Floyd and other African-Americans demonstrated the complete lack of value for African-American lives. These terrible events inspired me to march for the first time last summer in downtown Hartford.

My dad taught me at an early age that some people will treat me differently solely because of the way I look, and that it was my job to never let how people treat me define who I am as per-

son. I always make it a point to showcase my character when meeting people personally and professionally; this is because I only want to be judged by my character.

My dad also taught me to always know your history. This meant understanding the struggles and sacrifices those before me made in order for me to have the opportunities I have today. Being an African-American CPA today means I'm benefiting from those struggles and sacrifices of my forefathers. All of this has shaped me to always maximize every opportunity that comes my way.



Shanita Booker
Tax Compliance
Analyst, The Hartford
Co-Chair, CTCPA
Diversity, Equity, and
Inclusion Initiative

What's one message you'd like to share with companies looking to start or improve their diversity/inclusion initiatives?

When looking to improve Diversity, Equity, and Inclusion (DE&I) efforts, it's important to have a concrete purpose and motive that drives the conversations, initiatives, and events. The purpose and motive should steer away from just trying to keep up with other organizations or achieve a certain metric for the year. Rather it should build on the notion of bringing awareness, implementing change, or celebrating milestones that can be recognized over time.

It's important to understand that DE&I is more than just gathering a bunch of people together who have differences. I relate DE&I efforts to the metaphor of "having a seat at the table," which

should always strive to recognize and further analyze:

- Who is invited to the table,
- Who feels encouraged to come sit at the table,
- Who feels empowered to have a voice at the table, and lastly
- Who feels they are actually being heard at the table, and after leaving the table.

I believe that when DE&I efforts are put forth with concrete purpose and motive, and those questions posed above are analyzed regularly, the result will show that a thoughtful effort was made and continued growth and success will follow for any organization.



Hey CTCPA Members! It's Time You Got to Know Plymouth Rock Assurance.

CTCPA members can **SAVE OVER \$581*** on auto insurance. You may also be eligible for a 5%¹ discount!

Call 833-4CT-CPAS to find out how you can start saving today!

Plymouth Rock is the Northeast's pre-eminent property and casualty insurance provider, and we've been around close to 40 years. We are committed to delivering the highest standard of customer care and satisfaction and we give you exclusive benefits and services that no other carrier offers.



Our auto insurance comes with exclusive features and benefits like:



Crashbusters®

Crashbusters mobile claim service brings the settlement process right to you. In many cases, you'll get a check on the spot.²



Get Home Safe®

Get Home Safe accident prevention provides our customers with taxi or rideshare fare reimbursement for a safe ride home.³



Door to Door Valet Claim Service®

Door to Door Valet Claim Service takes the stress out of auto repair service. We'll handle the process from start to finish.²

Plymouth Rock assurance®

Plymouth Rock Assurance® and Plymouth Rock® are brand names and service marks used by separate underwriting, managed insurance, and management companies that offer property and casualty insurance in multiple states pursuant to licensing arrangements. In Connecticut, insurance is underwritten by Plymouth Rock Assurance Corporation, Palisades Insurance Company, and Bunker Hill Insurance Company. In New York, insurance is underwritten by Plymouth Rock Assurance Preferred Corporation, Plymouth Rock Assurance Corporation of New York, Palisades Insurance Company, and Palisades Property and Casualty Insurance Company. Each underwriting and managed insurance company is a separate legal entity that is financially responsible only for its own insurance products. Actual coverage is subject to the language of the policies as issued by each separate company. Some discounts, coverages, payment plans, features and benefits are not available in all states and companies.

*Amount based on average annual savings reported by Plymouth Rock customers in multiple states who switched during 1/1/2018 to 12/31/2018. Your premium may vary due to the state in which your policy is written, differences in the Plymouth Rock underwriting company, available discounts, eligibility requirements, driving record and other factors.

¹Connecticut affinity automobile group discounts apply to policies written in Palisades Insurance Company. Not available through Independent Agents. If a policy qualifies for an affinity group discount in more than one group, only one affinity group discount will apply.

²Available to customers who have purchased comprehensive or collision coverage.
³Personal auto insurance policyholders may be reimbursed up to \$50 of taxi fees once per year for a one-way ride if they find themselves in a situation where it would be unsafe to operate their vehicle (not applicable to mechanical breakdown). Original receipt must be submitted with the reimbursement form.



President
Brian P. Reilly, CPA
Travelers



President-elect
Michael Maksymiw Jr., CPA, CGMA
Marcum LLP



Treasurer
Katherine Donovan, CPA
Whittlesey



Secretary
Mark M. Wynnich, CPA
*Weinshel, Wynnich
& Associates, LLC*



Advisory Council Chair
Amber Moore, CPA
Goldblatt Bokoff LLC



Member-at-Large
Kevin Lawlor, CPA
Fairfield University



Member-at-Large
Carrie A. Zimyeski, CPA
Zackin Zimyeski Sullivan CPA LLC

About CTCPA's Leadership Groups

Board of Directors

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

A Nominating Committee of members determines the slate of candidates each year. Elections will take place at the Annual Meeting on May 10.

Advisory Council

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

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

2021-2022 Advisory Council Appointees



Amber Moore, CPA
Chair
Goldblatt Bokoff, LLC



Matthew J. Auth, CPA
Member-at-Large
EY



Eliot M. Bassin, CPA, CFE
Member-at-Large
Bregman & Company, P.C.



Amanda Bristol, CPA
Member-at-Large
Reynolds + Rowella



Cynthia R. Calderón
Diversity, Equity,
and Inclusion
CohnReznick



Santo Carta, CPA
Governmental
Accounting & Auditing
CLA (CliftonLarsonAllen LLP)



Alan J. Clavette, CPA
State Taxation
Clavette & Company, LLC



Geoffrey S. Currie, CPA
Member-at-Large
Deloitte



Bryan Decker, CPA
Peer Review
PKF O'Connor Davies, LLP



Guy Drapeau, CPA, MBA
Member-at-Large
Trinity College



Stacy R. Farber, CPA
Employee
Benefit Plans
UHY Advisors LLP



Ruth L. Gretz, CPA, PFS, CFP®
Member-at-Large
*RDM Financial Group
HighTower*



Sharon M. Grindle, CPA, CFE
Valuation, Forensic,
Litigation
Lenkowski Lonergan & Co., LLP



Kenneth J. Healy, CPA
Member-at-Large
*Diversified Financial
Solutions PC*



Bradley Hillman, CPA
Finance Professionals
in Industry
*Global Steering
Systems*



Kevin J. Kiss, CPA
Financial
Institutions
RSM US LLP



Alexander Kotwal, CPA
Fairfield County
Young Professionals
Marcum LLP



Marie G. Kulesza, CPA
Educators
*Central Connecticut
State University*



Katelin Machnicz
Hartford County
Young Professionals
Crowe LLP



Thomas Maddaloni, CPA
Member-at-Large
Madison Company



Richard A. Madonna, CPA
Member-at-Large
Connecticut College



Mary C. Manfredi, CPA
Member-at-Large
*General Dynamics
Electric Boat*



Joseph W. Mooney, CPA, CGMA
Member-at-Large
The Connecticut Hospice



Misal Panchal, CPA
Member-at-Large
*Connecticut
Insurance Department*



Lany Pfeifer, CPA
Trust, Estate,
and Gift Tax
BYCCPA LLC



Randee Roucoulet, CPA
Technology
*Simione, Macca
& Larrow LLP*



Ryan C. Sheppard, CPA, CFF
Professional Ethics
*Knight Roller
Sheppard CPAs, LLP*



Amber Tucker, CPA
Not-For-Profit
Organizations
*Fiondella, Milone &
LaSaracina LLP*



Michael J. Welch, CPA/ABV/PFS, J.D., LL.M.
Federal Income Tax
*Pue, Chick, Leibowitz
& Blezard, LLC*



Michael A. Ziebka, CPA
Accounting,
Auditing, and
Financial Reporting
Budwitz & Meyerjack, P.C. 31



Welcome, New Members!

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

New Certified Members

Jennifer L. Desjardins
A. H. Harris & Sons, Inc.

Carol E. Dubs
Arbor Accounting

Adam O'Feeney
CironeFriedberg, LLP

Christopher M. Marziale
CohnReznick LLP

Larissa Bodie
CT Clinical Services Inc

Christopher B. Fehl
Deloitte

Marie Hoyt
Deloitte

Amber Fecik, CPA, CSX
Deloitte

Kevin Tirella
Deloitte

Robert K. Reynolds
Deloitte

Qin Lin
Deloitte

Guangya Zhang
Deloitte

Brendan T. Finnerty
Deloitte

R.J. Zielinski
Deloitte

Eileen A. Crowley
Deloitte

Joseph J. Perfetto
Deloitte

Vicki Doyne
Deloitte

Michael Berrigan
Deloitte

Brian C. Masi, MSAT
Deloitte Tax LLP

Erica Calamari
Deloitte Tax LLP

Mohamed Mostafa
EY

John Mallin, MBA
EY

Sheryl Choong
EY

Anna V. Dupaul
EY

Brooke Steinhiser
EY

Nathan Marcotte
EY

Megan E. Kalus
EY

Michelle K. Costa
Grant Thornton LLP

Rafael E. Olmeda
Knight Rolleri Sheppard CPAS, LLP

Chayan Lhila
KPMG

Patrick Sheridan, CPA
KPMG

Caitlin R. Prete, MBA
Marcum LLP

Alexander M. Lombardi
Marcum LLP

Nikko Ardito
Mason, DiMarco & Shaw, P.C.

Evelyn Cueva, MBA
Morrow Sodali

Alan B. Cabot
MP CPAs

Nan Jiang
PKF O'Connor Davies, LLP

Asia L. Smith-Greer, CPA
PwC

Cathryn Salony
Salony & Larsen LLC

New Associate Members

Michael D. Green, JD, MOT, ABV
Arendholz Bryan & Associates, Inc.

Wojciech Kajzer
Deloitte

Navin Purushotham
Deloitte

Jonathan Wintenburg
Deloitte

Javim Gordon
Deloitte

Maeve M. Fearon
Deloitte

Benjamin Cushing
Deloitte

Ryan Mills
Deloitte

Chinh T. Phan
Deloitte

Paige Honeycomb
Deloitte

Andrew Romano
Deloitte Tax LLP

Daniel Seabra, MBA, CISA
Hartford Financial Services Group

Andrew W. Kane
King, King & Associates

Anthony J. Rosato
MMNT, LLC

Daniel Mauclair
National Network of Accountants

Joseph Tucciarone
National Network of Accountants

Paul Hyl
PIM

Amber Fay
Tomasetti, Kulas & Company, P.C.



Company Moves and Promotions

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



Stacy Farber

Stacy R. Farber joined UHY, LLP in June 2020 as a senior manager and has been promoted to Principal in the Farmington office. Stacy

returned to public accounting after being in private industry for more than seven years as a CFO and controller. Stacy brings more than 20 years of experience to the firm and will be leading the Farmington office assurance practice, which includes audits, reviews, and compilations of for-profit and non-profit entities, with a focus on audits of employee benefit plans. Stacy specifically focuses on clients in the manufacturing and distribution, construction, and retail industries. Stacy will be serving as the 2021-2022 CTCPA Employee Benefit Plans Committee Chair.



Andrea Harrington

Andrea Harrington was promoted to Partner at Fiondella, Milone & LaSaracina (FML) in Glastonbury. Andrea has been with FML since 2006

and has more than 25 years of experience in the field. At FML, she was most recently Director, Tax Services, where she specialized in tax and advisory services for unique and complex issues of partnership and S corporation taxation, such as basis and at-risk limitations, special allocations and Section 199A reporting, and taxation for high-net-worth individuals.

MMNT, LLC in Manchester announced the following promotions:

- **Brett Gotler** has been named a Partner; she will serve as the firm's Human Resources Partner. Brett has been a member of the firm for 14 years.
- **Nick Zevetchin** has been promoted to Senior Accountant.



Daniel Wiecek

CironeFriedberg has welcomed **Daniel P. Wiecek** as Tax Manager. He serves privately held business clients and their owners on all tax-related

matters, high-net-worth individuals, C and S corporations, and LLCs and partnerships in the manufacturing, professional services, construction, and real estate industries.



Patrick Dunleavy

CironeFriedberg also announced its expansion with new Principal, **Patrick Dunleavy**, serving as Audit Principal

providing services for not-for-profit, manufacturing and distribution, and arts and cultural organizations, independent schools, and human service agencies. In addition, he has advised on numerous purchase and sale transactions of businesses within private equity portfolios and collaborated on the associated due diligence and the final accounting. Patrick serves as an advisor for VetFuel, a not-for-profit agency providing community-based advocacy and case management services to Connecticut's Veterans and is treasurer for the New Haven Symphony Orchestra and serves on the board of directors for its foundation.

Barron & Company, LLP and **Kosovsky and Company, CPA and Consultants, LLC** have merged their practices and will operate under the name of Barron & Company, LLP. The firm will maintain both its Torrington and West Hartford offices. In addition, **Cherie Lafazanidis** was promoted to Partner at the firm. She specializes in tax and accounting services for closely held businesses.



Stacey Curran

Whittlesey welcomed **Stacey Curran** as an Assurance Manager. She has more than eight years of public accounting experience with expertise in

nonprofit and healthcare organizations, financial services firms, and employee benefit plans. Before entering public accounting, she spent more than a decade in the mortgage banking industry, holding operational management roles. She serves on nonprofit boards and committees and is a member of the Bridgeport Regional Business Council.



Zachary DeFeo

Whittlesey has also welcomed **Zachary DeFeo** as a Tax Manager. He has more than 10 years of public accounting experience and six years in

the private sector with various tax and financial management roles. He has extensive experience in state and local tax compliance and multistate tax filing.



Member News

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



Ken Healy

Ken Healy, a Partner at Diversified Financial Solutions, P.C. in Naugatuck, was named one of the 2020 *CPA Practice Advisor* “40 Under 40 in the Accounting Profession.” Ken previously made the list in 2018. Currently a trustee on the CTCPA Accounting Scholarship Foundation and a member of the Advisory Council, Ken was named one of the CTCPA’s “NYPs to Watch” in 2016.



Ryan Sheppard

Ryan C. Sheppard, a Partner with Knight Roller Sheppard CPAs, LLP, was featured on the NBC Connecticut pieces “Tax Help for PPP Recipients?” and “Fire District to Hire Financial Auditor Over PPP Loan Concerns.”

Connecticut Wealth Management of Farmington ranked #1 on the Hartford Business Journal’s “2021 Best Places to Work in Connecticut” list, in the small/medium employers category.

Greg Boyko was recently conferred by the Japanese government with the Order of the Rising Sun, Gold Rays with Neck Ribbon by the Minister of Foreign Affairs. When COVID-19 restrictions have been loosened, Greg will be honored during a ceremony and reception. This award is in recognition of his many years of service as the Honorary Consul General of Japan. Greg lived in Japan, traveled there more than 100 times, and set up a successful annuity business in Tokyo. He has actively promoted the relationship between the United States and Japan for more than 20 years including many speeches and being a Director and Past President of the Manjiro – Whitfield Center for International Exchange. This organization, along with its Japanese counterpart, has sponsored the largest, continuous grassroots exchange between United States and Japanese citizens. More than 45,000 people have traveled back and forth between Japan and the US staying with host families over the past 25 years.



Dennis Cole of Beers, Hamerman, Cohen & Burger, P.C. Quoted in WTNH Story on Unemployment Overpayments

In light of the Connecticut Department of Labor’s issuance of incorrect 1099-Gs and unemployment overpayment issues affecting multiple states including Connecticut, the CTCPA felt it was important to alert the general public about the matter. We issued a press release encouraging people to pay close attention to their 2020 financial documents and contact a CPA.

Jodi Latina from WTNH interviewed CTCPA Past President **Dennis Cole** of Beers, Hamerman, Cohen & Burger, P.C. View the segment at www.ctcpas.org/ColeInterview.

>> Classified Advertisements >>

Mergers/Acquisitions

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

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, ext. 302.

Merger or Sale – Central Connecticut firm searching for CPA to replace or complement a retiring partner. Firm offers professional accounting, tax and nontraditional services. A full transition is possible. Please email tigerfly213@aol.com.

>> **Place a classified ad at www.ctcpas.org/classifieds**

Cost: Members: \$2 per word
Nonmembers: \$3 per word

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



Do you have broad professional liability insurance coverage?

You do if you are insured with the **AICPA Professional Liability Insurance Program**.

When it comes to something as important as your CPA firm, do you want to insure it with a professional liability insurance policy created for all types of professionals?

Doesn't it make sense to cover your firm with a professional liability insurance program created with the support of the AICPA specifically for CPAs?

Get the benefits of a national provider with the personal service you deserve:

- Covering over 50% of the insured CPA firms in CT and NY
- Policy form designed to cover the unique exposures of CPA firms
- All size firms and areas of practice are eligible
- Premium credits designed to reflect the way CPAs do business

Please contact **Ken Gross** at **PACE** today!

Phone: (800) 453-4021 • Fax: (516) 222-6007 • Email: pace@paceprofessional.com

Endorsed by:



Endorsed by:



Underwritten by:



Administered by:



Aon Insurance Services is the brand name for the brokerage and program administration operations of Affinity Insurance Services, Inc. (AR 244489); in CA and MN, AIS Affinity Insurance Agency, Inc. (CA 0795465); in OK, AIS Affinity Insurance Services Inc.; in CA, Aon Affinity Insurance Services, Inc. (0G94493), Aon Direct Insurance Administrators and Berkely Insurance Agency; and in NY, AIS Affinity Insurance Agency.

One or more of the CNA companies provide the products and/or services described. The information is intended to present a general overview for illustrative purposes only. It is not intended to constitute a binding contract. Please remember that only the relevant insurance policy can provide the actual terms, coverages, amounts, conditions and exclusions for an insured. All products and services may not be available in all states and may be subject to change without notice. The statements, analyses and opinions expressed in this publication are those of the respective authors and may not necessarily reflect those of any third parties including the CNA companies. CNA is a registered trademark of CNA Financial Corporation.

Copyright © 2014 CNA. All rights reserved.

E-10373-514 CT

paid advertisement

Connecticut Society of CPAs

716 Brook St., Suite 100 • Rocky Hill, CT 06067-3433
860-258-4800 • www.ctcpas.org

Periodicals
Paid at
Hartford, CT

Form **4868**

Application for Automatic Extension of Time To
Sell My Accounting Practice

OMB No. 1545-0074

2020

Department of the Treasury
Internal Revenue Service (99)

For calendar year 2020, or other tax year beginning _____, 2020, and ending _____, 20____.

Part I		Part II Individual Income Tax	
1 Your name <i>Jessie</i>		4 Estimate of total tax liability for 2020 \$	
Address <i>26742</i>		5 Total 2020 payments	
City, town <i>Missisquoi</i>	State <i>CT</i>	6 Balance due. Subtract line 5 from line 4 (see instructions)	
	ZIP code <i>06002</i>	7 Amount you're paying (see instructions) . . . ▶	
2 Your social security number <i>354-79</i>	8 Check here if you're "out of the country" and a U.S. citizen or resident (see instructions) ▶		<input type="checkbox"/>
	9 Check here if you file Form 1040NR or 1040NR-EZ and didn't receive wages as an employee subject to U.S. income tax withholding ▶		<input type="checkbox"/>

*Don't put my EXIT PLAN on extension!
Call APS Today!!*

For Privacy Act Notice, see page 4.

Act Notice, see page 4.

Cat. No. 13141W

Form **4868** (2020)

\$1 BILLION+ IN DEALS CLOSED!

Our Best-in-class Brokers will help you achieve YOUR goal!

DELIVERING RESULTS -ONE PRACTICE AT A TIME



ACCOUNTING PRACTICE SALES
THE GLOBAL LEADER IN PRACTICE SALES

Lori Newcomer, CPA
& Tim Price, CPA
PNgroup@aps.net

888-553-1040
www.APS.net
CTCPA Member

