

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

ADVISORY

Professionals on the Move – Jan. 26, 2019

Professionals on the Move is a roundup of recent promotions and advancements at accounting firms across the country.

Jan. 26, 2020



Professionals on the Move is a roundup of recent promotions and advancements at accounting firms across the country.

Wall, Einhorn & Chernitzer, P.C. Announces Retirement of Martin “Marty” Einhorn

[Wall, Einhorn & Chernitzer, P.C.](#) (WEC), a CPAmerica member firm, announced that shareholder Angela Kerns, CPA, HCCP, assumed the role of managing shareholder on Jan. 1, 2020. Kerns succeeds Marty Einhorn, who has served as managing shareholder since the firm was established in 1989.

In her expanded role, Kerns will be responsible for all aspects of the CPA firm’s performance. Penelope Bustamante, the firm’s chief operating officer, will assist Kerns in her transition.

Kerns has 20 years of public accounting experience. Since joining the firm in 2002, Kerns has been a key member of the accounting and auditing department, leading the firm's real estate client service team specializing in affordable housing audits and providing accounting and consulting services.

A graduate of James Madison University, she is an avid supporter of the Dukes football team.

KSJG joins its practice with Withum

Effective January 1, 2020, **KSJG CPA, LLP** (KSJG), a public accounting firm based in Irvine, CA, joined its practice with **WithumSmith+Brown, PC** (Withum), a regional CPA and advisory firm with 14 offices, 1,200 team members and annual revenue of \$224M, ranking in the top 25 firms in the country. KSJG will remain at their location in Irvine, CA. Eight partners, including one of the original founders, Bob Kushner, and approximately 55 other team members will be added to the Withum team roster.

Combined, Withum and KSJG serve a wide range of industries, including construction, technology, financial and investment, healthcare, not-for-profit, manufacturing, food & beverage distribution and service, and real estate.

Katz, Sapper & Miller has recently announced 22 new managers

Katz, Sapper & Miller, a top CPA firm, recently announced 22 new managers. They are:

Kari Baker – Manager, Audit and Assurance

Andrew Browning – Manager, Audit and Assurance

Bryan Fender – Manager, Audit and Assurance

Michael Giant – Manager, Business Advisory

Julia Harcourt – Manager, Business Advisory

Kevin Ker – Manager, Business Advisory

Sarah Lubben – Manager, Audit and Assurance

Greg Manning – Manager, Healthcare

Grace McNulty – Manager, Real Estate

April Meade – Manager, State and Local Tax

Daniel Mohr – Manager, Audit and Assurance

Elizabeth Paulus – Manager, Business Advisory

Brian Rash – Manager, Audit and Assurance

Alix Richardson – Manager, Business Advisory

Laura Russelburg – Manager, Business Advisory

Josey Seabolt – Manager, Business Advisory

Michael Sechuga – Manager, Tax

Megan Slager – Manager, Real Estate

Eric Swanson – Manager, Audit and Assurance

Nathan Welty – Manager, Business Advisory

Brandon Wenger – Manager, Business Advisory

Lisa Yost – Manager, Business Advisory

In addition, Katz, Sapper & Miller recently promoted Lisa Curry and Beth Scott to partner and also announced Amy Lehrman as managing director of the Fort Wayne office.

Weaver Expands Real Estate Practice

National certified public accounting firm Weaver, one of the 35 largest public accounting firms in the United States, announced today that Richard (Rick) Edwards has joined the firm to expand the depth and capabilities of its real estate service offerings. Edwards has more than 15 years of experience valuing a wide range of real estate assets across the U.S. and internationally, and will be a managing director leading the real estate valuation group. Before joining Weaver, Edwards was the founder and managing partner of Greystone Realty Group, a Dallas-based real estate valuation and consulting firm, and has provided real estate valuation analysis for financial reporting, trust and estate, portfolio valuation, fairness opinions for

mergers and acquisitions, and leasehold analyses. Edwards will be based in Weaver's Dallas office.

Marks Paneth Promotes New Partners

Leading accounting, tax and advisory firm, [Marks Paneth LLP](#), recently announced the promotion of the following professionals to partner, effective January 1, 2020:

[Pamela Cianciotta](#), Commercial Business Group, provides tax, accounting and consulting services to clients in various commercial industries, as well as commercial and residential real estate. Ms. Cianciotta is based in the firm's Long Island office.

[Gina Citrola](#), Real Estate Group, specializes in the audit of residential properties in the affordable housing industry, including those endorsed by the U.S Department of Housing and Urban Development (HUD) and those in the low-income housing tax credit program (LIHTC). Ms. Citrola is based in the firm's Long Island office.

[Magdalena Czerniawski](#), Nonprofit, Government & Healthcare Group, provides tax services to a wide array of nonprofits, including charitable organizations, schools, social welfare organizations, professional associations and private foundations. Ms. Czerniawski is based in the firm's New York office.

[John D'Amico](#), Professional Standards Group, specializes in pre-issuance reviews of nonprofit organizations, governments and Single Audits. He teaches continuing education classes for the firm and on behalf of the AICPA nationally. Mr. D'Amico is based in the firm's New York office.

[Matthew Estersohn](#), Nonprofit, Government & Healthcare Group, plans, coordinates and conducts audits for a wide range of nonprofits, including social service organizations, health and welfare organizations, educational institutions, private foundations and membership organizations. Mr. Estersohn is based in the firm's New York office.

[Jennifer Leelaviwatana](#), Private Client Services Group, provides a broad range of tax planning and consulting services in the real estate and professional services industries, estates and trusts, as well as for high-net-worth individuals and closely held businesses. Ms. Leelaviwatana is based in the firm's New York office.

[Elizabeth Mueller](#), Hospitality Group, specializes in providing audit, advisory and tax services to privately held entities that own and manage hospitality assets, including

hotels, restaurants, limited service properties, high-end resorts and management companies. Ms. Mueller is based in the firm's New York office.

[Deana Wetzel](#), Real Estate Group, specializes in audit and consulting engagements for both commercial and residential real estate clients as well as co-ops and condominiums and is involved with several high-profile real estate clients. Ms. Wetzel is based in the firm's Long Island office.

Toomey Chosen to Lead BKD Wealth Advisors

BKD CPAs & Advisors has selected Steve Toomey as the next managing partner of BKD Wealth Advisors, LLC (BKDWA), a subsidiary of BKD that provides investment oversight, wealth management and family office services to high-net-worth families and corporations. Toomey will succeed Jack Thurman, who has provided wealth management services since 1986.

Toomey will start his new position effective June 1, 2020, with Thurman's planned retirement on May 31, 2021. During his final year, Thurman will focus on developing several significant client opportunities, including the critical transition planning of these relationships, allowing Toomey to effectively take the reins of BKDWA.

Thurman will work closely with Toomey to help ensure a unified approach to supporting clients and serving their needs. A strong succession plan is key to helping clients with upward mobility and continued success.

blumshapiro Elects Natick Resident Andrew Bostian as Partner

blumshapiro, the largest regional business advisory firm based in New England, with offices in Connecticut, Massachusetts and Rhode Island, has announced the election of a new partner, **Andrew Bostian**, ASA, MST.

Bostian is a partner in blumshapiro's Litigation and Business Valuation Group in Quincy, Massachusetts. He joined the firm in 2014. His valuation experience includes valuations for gift and estate tax purposes, bank financing, litigation support, charitable contributions, equity-based compensation and equity buyouts.

Bostian is a graduate of blumshapiro's inaugural Leadership Academy and serves on the Planned Giving Committee for the blumshapiro Foundation. Bostian is also an

Accredited Senior Appraiser, and holds an Economics degree from Lafayette College and an MST from Northeastern University.

blumshapiro Elects Walpole Resident Lindsey McGrath as Partner

blumshapiro, the largest regional business advisory firm based in New England, with offices in Connecticut, Massachusetts and Rhode Island, has announced the election of a new partner, **Lindsey McGrath**, CPA, MST.

McGrath is a partner in blumshapiro's Tax Department in Quincy, Massachusetts. She joined the firm in 2015 through its merger with Schneider, Schneider & Associates and has sixteen years of professional experience and began her career as a state auditor with the Massachusetts Department of Revenue.

McGrath's areas of focus include partnerships/limited liability companies with a concentration on real estate and is member of the American Institute of Certified Public Accountants and the Massachusetts Society of Certified Public Accountants.

A graduate of Bentley University, McGrath received a Bachelor of Science in Accounting, and Master of Taxation with high-distinction honors.

Financial Accounting Foundation Names Kathleen L. Casey as Chair: Appoints Five New Members to Board

The Board of Trustees of the Financial Accounting Foundation (FAF) today announced that it has elected Kathleen L. Casey as its next chair. She currently serves as a director of HSBC Holdings PLC and the Federal Home Loan Mortgage Corporation. Her other board memberships include Pennsylvania State University, Penn State Health, the International Valuation Standards Council, and the Library of Congress Trust Fund. Ms. Casey earned her BA from Pennsylvania State University and her JD from George Mason University.

Ms. Casey's three-year appointment takes effect January 1, 2020. She succeeds Charles H. Noski, whose term concludes at the end of 2019.

In addition, the FAF Board of Trustees today announced the appointment of new Trustees Bruce Herring, Michael Rollings, Timothy Ryan, Lawrence Salva, and Shundrawn Thomas. All of these appointees' terms begin January 1, 2020, and conclude December 31, 2024.

Richard R. Jones Appointed Chair of the Financial Accounting Standards Board

The Board of Trustees of the Financial Accounting Foundation (FAF) today announced that it has appointed Richard R. Jones as the next chair of the Financial Accounting Standards Board (FASB). Mr. Jones succeeds [Russell G. Golden](#), and his appointment is effective July 1, 2020. Mr. Jones is expected to join the organization in early 2020 in order to enable a smooth, orderly leadership transition for the FASB.

Mr. Jones is chief accountant and partner at Ernst & Young LLP (EY), leading a large and diverse team of EY professional colleagues in the firm's national office. Mr. Jones has spent his entire career at EY, joining in 1987 following his graduation with a BS in accounting from the State University of New York, Binghamton. Mr. Jones held the title of assurance staff and senior manager from 1987–2000 and was promoted to assurance partner in 2000. In 2008, he was named director, consultations, and he was appointed to his current post in 2014.

TJS Deemer Dana LLP Recognized by Forbes Magazine and Elects New Leadership

TJS Deemer Dana LLP (TJSDD), one of the Top 300 Accounting Firms according to Inside Public Accounting, is pleased to announce a new accolade. Forbes magazine has listed them as one of [America's Top Recommended Accounting Firms](#) in both the Tax and Accounting categories. Only 227 firms across the nation were honored out of 92,000 accounting firms in the U.S. TJS Deemer Dana is one of only 11 firms from Georgia to receive this award.

The firm is also pleased to announce leadership changes and additions for 2020 with R. Chad Reese recently promoted from tax director to the role of tax partner for TJSDD. In addition, Kenneth (Ken) Wood has moved into the role of managing partner. Wood has over 28 years of experience in public accounting with significant experience in all forms of attestation engagements including audits, reviews, compilations and agreed upon procedures for clients of varying sizes and industries as well as both private and public institutions of higher learning.

Harry Moehringer Reelected Managing Partner of Marks Paneth

Leading accounting, tax and advisory firm Marks Paneth LLP has reelected Harry Moehringer as Managing Partner for a third consecutive term. Mr. Moehringer has a well-earned reputation as a visionary leader and has played a pivotal role in building Marks Paneth into the premier accounting firm it is today. In recognition of his innovative leadership, he was named one of *Accounting Today's* 2019 Managing Partner Elite.

During his tenure at Marks Paneth, Mr. Moehringer has taken a measured and strategic approach to growth, leading expansion efforts organically and through the selective acquisition of firms that closely align with the firm's strategic vision for the future. Mr. Moehringer has also focused on attracting and retaining the right talent, with the goal of increasing resources across the firm's core industries, including real estate, high-net-worth, tax advisory and nonprofit.

Fady Qaddoura to Join Katz, Sapper & Miller as Firm's First Chief Innovation Officer

Katz, Sapper & Miller (KSM), a leading accounting and consulting firm, has named Fady Qaddoura, former controller and CFO for the City of Indianapolis, as its first chief innovation officer, effective Jan. 13.

Qaddoura joins KSM after a decade in public service, first for the Indiana General Assembly, then the Indiana Department of Workforce Development and Indiana Family and Social Services Administration, before being appointed the controller and CFO for the City of Indianapolis by Mayor Joe Hogsett in 2016.

He holds bachelor's and master's degrees in computer science, a master's degree in public administration, and a Ph.D. in philanthropy and public policy. Qaddoura also teaches courses on philanthropy, civic engagement, executive leadership, and finance as an adjunct faculty member at Indiana University – Indianapolis.

Cas L. Pittman to Join Smith & Howard's Partner Group

Smith & Howard, a nationally recognized Atlanta accounting and advisor firm, is pleased to announce that Casimira "Cas" Pittman has been named a Partner in the firm, effective January 1, 2020. Cas, who joined Smith & Howard in 2008, works with clients in several industries but has developed a well-regarded expertise within the manufacturing and distribution industry.

With this promotion, Cas adds to the growing number of women taking on leading roles at Smith & Howard, which was named one of the Best Firms for Women in 2019 by *Accounting Today*.

Millstone Capital Advisors Hires Senior Accountant

[Millstone Capital Advisors](#), a St. Louis based private equity management company, hired Jeff Nickel as the firm's new Senior Accountant. In his new position, Nickel will be primarily responsible for the preparation of financial reporting for all of Millstone

Capital Advisors' funds and their investments. He will also assist in overseeing, evaluating and closing potential acquisitions.

Nickel earned a B.S. in Accounting and Economics with an emphasis in Leadership at William Jewell College, served as a campus leader in various organizations, and was a Pryor Leadership Fellow. Since graduation, Nickel has volunteered with Junior Achievement and participated in mentoring opportunities with a St. Louis area high school.

Blue & Co., LLC Announces Leadership Additions for 2020

Blue & Co., LLC is proud to announce the promotion of Landon Hackett, Tony Javorka, and Rob Kester to director effective January 1, 2019.

Landon Hackett is a Director with Blue & Co., LLC. His focus is primarily in the reimbursement area with a concentration in Medicare and Medicaid cost reports, Medicaid disproportionate share reimbursement and state and federal healthcare regulation.

Mr. Hackett has degrees from Indiana University and Indiana University – Purdue University Indianapolis. He is a member of the AICPA, Indiana CPA Society, along with a number of health care organizations.

Tony Javorka is a Director of Blue & Co.'s Valuation and Healthcare Strategy Group. He has more than 20 years of experience in consulting in and working in the healthcare arena for various providers. Mr. Javorka primarily works with executive leaders to engage their focus on the physician enterprise to maximize financial and operational performance.

Mr. Javorka holds a Bachelor of Science degree from Indiana State University, and is a current or past participant in many civic/board roles in the community.

Rob Kester is a Director in Blue & Co.'s Business Valuation & Litigation Support Services Group, serving the Kentucky, Indiana, and Ohio markets. Mr. Kester has more than 15 years of experience in the forensic accounting and valuation fields including the areas of estate and gift, marital dissolution, lost profits, damages, and support to attorneys in virtually all areas of litigation, including expert testimony and case consultation.

Mr. Kester earned a Bachelor's and Master's degree in accounting from the University of Kentucky and holds the certifications of Accredited in Business Valuation (ABV),

Certified Public Accountant (CPA), and Certified in Financial Forensics (CFF).

Morgan W. Holtman Bolsters BakerHostetler Tax Group

BakerHostetler announced that [Morgan W. Holtman](#) has joined the firm as a partner on its international tax team, resident in Washington, D.C. She previously was a director in a Big Four accounting firm's national tax practice.

Holtman brings with her nearly 20 years of experience in transactional tax matters, having begun her career with the Big Four accounting firm's national office in 2001, joined Dewey Ballantine LLP as a tax associate in 2006 and returned to the Big Four accounting firm as a director in 2012.

Holtman received her LL.M. from Georgetown University Law Center, her J.D. from Widener University Delaware Law School and her B.A. from the University of Delaware.

Advisory • Firm Management • Technology

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved