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Feb. 28, 2020



Professionals on the Move is a round-up of recent promotions and hires.

Nathan Wechsler Announces New Team Member

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Director of Eisneramper's Center for Family Business Excellent Earns Ph.D. in Business Psychology

EisnerAmper LLP, one of the largest professional services firms in the world, recently announced that Matthew Kerzner, a director in the firm's Center for Family Business Excellence, has earned his Ph.D. in Business Psychology from The Chicago School of Professional Psychology.

Matt's doctoral degree adds to his more than 25 years of experience in organizational development specializing in assisting family businesses and closely held businesses with addressing transition, financial stability and sustainability, and human performance management matters.

Nathan Wechsler Senior Provides Tax Training to Small Business Owners

The regional accounting firm of Nathan Wechsler & Company, a full service accounting and tax firm, recently announced that Ashley Guion recently led a workshop for small business owners at the Hannah Grimes Center for Entrepreneurship.

Guion joined Nathan Wechsler & Company in 2017 and currently serves as a senior, where she performs work on a variety of clients, including accounting, compliance, financial statement preparation, income tax return preparation, and special projects.

Guion attended the Peter T. Paul School of Business & Economics at the University of New Hampshire. She graduated magna cum laude, earning both a Master of Science in Accounting and a Bachelor of Science in Business Administration with options in Accounting and Management, as well as a Minor in Spanish.

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specialties to ensure the optimal combination of talent, technical expertise, and innovative analysis in the resolution of client issues.

New Partners

Jimmy S. Pappas, CPA*, CFE, CFF, ABV, has joined Marcum as national leader of **Forensic Advisory Services**. Based in the Boston office, Mr. Pappas has more than 20 years of experience advising legal counsel, management, and boards of directors on accounting, internal control, and complex financial matters related to internal investigations, civil and criminal litigation, and corporate governance.

Additionally, the following new partners have been admitted in six Marcum regions:

- **Mary Antonetti, CPA** (New Haven), Tax & Business Services – Ms. Antonetti specializes in tax compliance and consulting services to not-for-profit and healthcare organizations and has more than 30 years of public accounting experience.
- **Sara Carlson, CPA** (Chicago) – Ms. Carlson is a partner in the Firm's Technical Review and Quality Control Group, providing guidance to Firm professionals and clients on complex technical accounting and reporting issues.
- **Benjamin Dailey, CPA** (Portland, ME), Tax & Business Services – Mr. Dailey specializes in providing federal and state taxation and consulting services to individuals and closely held entities.
- **Stanley W. Farmer, CPA** (Houston), Assurance Services – Mr. Farmer specializes in services to the oil & gas industry, providing technical accounting for exploration and production, offshore drilling, oilfield waste management, water resource management, energy technology, and construction.

- **Qiqi Wei, CPA** (San Francisco), Assurance Services – Ms. Wei is a member of the

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- **Qasim Zaidi, CPA** (Philadelphia), Assurance Services – Mr. Zaidi has more than 20 years of experience with both public and non-public entities, providing revenue recognition, leasing, carve-out audits, purchase accounting, and transactions services.

RubinBrown Welcomes Michael Shapow as Partner

RubinBrown, one of the nation's top 50 accounting and business consulting firms, recently welcomed **Michael Shapow** as Partner-in-Charge of the **Business Advisory Services Group** for the **Chicago office**.

Michael has more than 35 years of consulting and business advisory experience. He works with clients in various industries across all business functions including information technology, accounting, mergers and acquisitions, business development, market strategy and executive leadership development. Mike manages RubinBrown team members experienced in cyber security, SOC compliance, internal audit, IT consulting and transaction services.

Marks Paneth Expands Alyssa Forslund's General Counsel Role to Include Chief Risk Officer

Leading accounting, tax and advisory firm, Marks Paneth LLP, has expanded Alyssa Forslund's General Counsel role to include Chief Risk Officer.

In this expanded role, which is based at Marks Paneth's New York City headquarters, Forslund leverages her extensive industry experience serving as a key member of the firm's leadership team. Her responsibilities include strengthening the firm's ability to identify and manage risks, developing best practices, policies and procedures to mitigate risks, and developing internal training programs to promote risk awareness among partners and staff.

Ms. Forslund's extensive legal experience includes working at a New York City law

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leader of the firm's business valuation practice, with extensive experience in valuation of business, securities and intangible assets for transaction, tax, financial reporting and other strategic purposes. Bautista received his B.S. in business administration from University of Southern California and his M.B.A. from Columbia Business School.

Alex Conti is a managing director of UHY Corporate Finance. He leads a team of professionals dedicated to executing transactions at all levels; including due diligence, restructuring and capital sourcing. He works closely with business owners to value companies and negotiate deals. Conti received his B.B.A. in Finance, Investments and Banking from University of Wisconsin-Madison and is a FINRA licensed representative.

Kathy Crockett is a managing director of UHY Advisors MI, Inc. She is a leader of the tax practice specializing in tax compliance, business forecasts, and tax strategies. Crockett has built her practice in multiple areas such as manufacturing, high net worth and medical industries. She received her B.B.A and M.S. in Professional Accountancy from Walsh College, and is a licensed CPA in the state of Michigan.

UHY Strengthens Presence in the United Arab Emirates

Established in 1986 and based in London, UK, UHY recently welcomed UHY James Chartered Accountants in Dubai, United Arab Emirates (UAE) to the global accountancy network UHY, extending coverage within the Middle East.

UHY James Chartered Accountants, with a total headcount of 77 and five partners, brings wide-ranging experience in audit, advisory, corporate finance, tax and management consultancy services to a portfolio of domestic and international clients across a number of sectors including healthcare, manufacturing, trading, contracting and real estate.

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recently served as aviation design practice leader.

EisnerAmper Expert to Lead Several Fintech Thought Leadership Events

EisnerAmper, one of the largest professional services firms in the world, recently announced that Dara Albright, a leader in its Center for Transformation, will be participating in a series of educational events February 19-21 that include the following:

Bagels & Blockchain – Hosted by EisnerAmper, Bagels & Blockchain is a newly launched series that will feature live discussions of relevant and timely blockchain-related topics with leading industry experts. Event will take place Wednesday, February 19, 8am-10am at EisnerAmper's NYC office; also streaming live. [Learn more here.](#)

Crypto World Summit – Produced by FinTech World Media, the 4th Annual Crypto World Summit is the crypto industry's leading boutique conference covering the latest technological and regulatory developments in security token offerings and digital assets. Event will take place Thursday, February 20, 8am-6pm at the Sheraton New York Times Square Hotel; also streaming live. [Learn more here.](#)

Digital Edge Roundtable – EisnerAmper's Digital Edge Roundtable is an exclusive opportunity for entrepreneurs developing emerging technologies to engage with one another as well as with prominent guest speakers to discuss a range of macro and micro issues that impact their businesses. Event will take place Friday, February 21, 11am-3pm at EisnerAmper's NYC office. [Learn more here.](#)

BKD Announces National Energy & Natural Resources Tax Leader

Tom Watson, regional managing partner for BKD's South Region, and Partner Brian Matlock, national practice leader of [BKD Energy & Natural Resources \(ENR\) Practice](#),

recently announced the promotion of Partner Rob Opitz to national tax leader for

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industry. Before joining BKD in 2018, Rob served as managing partner and head of tax for a preeminent firm in Fort Worth, Texas.

Andy Nguyen Joins Lavine, Lofgren, Morris & Engelberg, LLP

[Lavine, Lofgren, Morris & Engelberg, LLP](#), San Diego's largest independent certified public accounting firm recently announced that Andy Nguyen has joined the firm as a tax manager.

Nguyen is a CPA with seven years of experience providing accounting services to closely held small to medium-sized businesses in the professional services and technology fields. He is a member of the American Institute of Certified Public Accountants and serves on the California Society of Certified Public Accountants Committee on Taxation.

Nguyen received his Bachelor of Science degree in accounting with a minor in Chinese and Master of Science degree in accounting with an emphasis in tax from San Diego State University.

BKD Launches Nonprofit Advisory Services in New York

BKD CPAs & Advisors is pleased to announce the launch of BKD's Nonprofit Advisory Services in the firm's New York office with the addition of Corinna Creedon, who joins the team as a managing director and New York practice lead. Creedon has more than 20 years of experience as a finance executive and has provided outsourced chief financial officer (CFO) services, financial operations and compliance services to a wide range of clients.

Creedon will provide services to both nonprofit and for-profit clients and will lead BKD's Nonprofit Advisory Services.

Creedon is a New York CPA and holds dual degrees in accounting and international

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