

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: Sept. 2020

Professionals on the Move is a round-up of recent promotions and leadership changes in firms across the country.

Sep. 02, 2020



Nathan Wechsler Announces New Tax Manager

The regional accounting firm of Nathan Wechsler & Company, PA is pleased to announce the addition of Daniel Kravitz, CPA, JD to their professional team.

Kravitz earned his undergraduate degree—a Bachelor of Science in Accounting—from Canisius College. He went on to earn a Juris Doctor from Massachusetts School of Law and a Master of Science in Taxation from Bentley University.

Professionally, Kravitz is currently affiliated with the Massachusetts Society of Certified Public Accountants (MSCPA). He previously served as the vice president and treasurer of Jewish Family Service of Worcester, Inc. and as the treasurer of Temple Sinai in Worcester.

Friedman LLP Announces Multiple Promotions

Friedman LLP recently announced more than 100 promotions throughout the China, East Hanover, Long Island West, Long Island East, Marlton, New York, Philadelphia and Linwood locations. These promotions include four new principals, six new directors, and a new Chief Operating Officer.

Introducing Several New Titles and One New Face

Principals

- Matthew Citrolo – Tax, New York
- Pat Dugan – Audit, Marlton
- Steven Fischer – Audit, New York
- Lauren Grado – Audit, New York

Chief Operating Officer

Lindsay Gaal – Chief Operating Officer/Chief Human Resources Officer, New York

Directors

- Jamie Bozinoski – Human Resources, New York
- Danielle Dvorak – Tax, East Hanover
- Eric Freeman – CyZen (cybersecurity), Managing Director of Solutions and Services, New York
- Andrea Gratton – Tax, East Hanover
- Dmitriy Guller – Information Technology, New York
- William Mendez – CyZen, Managing Director of Operations, New York

Additionally, Friedman LLP the addition of Charles Campbell, who joins Friedman as a director in the Forensic Accounting, Litigation Support and Valuation Services (“FLVS”) group—based in the New York office.

FICPA Scholarship Foundation Announces 2020-21 Board Chair, Executive Committee and Board of Trustees Members

The Florida Institute of CPAs Scholarship Foundation (FICPA) recently announced the appointment of its 2020-21 Board Chair, Executive Committee and Board of Trustees. Term limits for each seat is three years and are effective July 1, 2020.

Bill Moore, Chairman. Businessman and Entrepreneur, Bill, joined the FICPA Scholarship Foundation Board of Trustees in 2013 and this is his second year serving as Chairman. Bill founded PENSERVCO, a company that administers retirement plans, and is celebrating its 20th year in business. The previous 10 years he was Sr. Vice President of Dun & Bradstreet Pension Services.

The 2020-21 Executive Committee for the Foundation are:

- **Bill Moore**, Chairman – PENSERVCO, Inc.
- **William Quilliam**, Chair-Elect – Florida Southern College
- **Donna Son**, Secretary/Treasurer – FICPA
- **Alan West**, Past Chairman – University of Florida
- **Carshena Allison**, Vice Chair – BCA Watson Rice, LLP
- **Elizabeth Manso**, Vice Chair – Brigade Bookkeeping

The 2020-21 Board of Trustees for the Foundation are:

- **Nestor Caballero*** – Caballero Fierman Llerena & Garcia, LLP
- **Silvana Capaldi** – Ispirare Group
- **Elizabeth Carlson** – Elizabeth Carlson, CPA
- **Jason Chorlins** – Kaufman, Rossin & Co., PA
- **David Cumberland** – Kerkering, Barberio & Co., CPA
- **George Gulisano** – Florida Skin Center
- **Lazaro Gutierrez** – Morrison Brown Argiz & Farra, LLC
- **Michael Halfast** – Risk Avoidance Managers, Inc.
- **Larry Houff** – Owner of Tallahassee Lighting & Decor
- **Celina Jozsi** – Florida Southern College
- **Nancy Juron*** – Deloitte, LLP
- **Candy Kessel** – Suplee, Shea, Cramer & Rocklein, PA

- **Jason Klein** – Jason H. Klein, PA
- **Gary Margolis** – Callaghan & Margolis, CPAs
- **Kylan McNemar** – BKHM, PA
- **Frank Morera*** – Chastang & Partners, LLC
- **Steve Morrison** – CohnReznick, National Assurance Office
- **Chris Nelson** – RGP – Central Florida
- **Benjamin Nussbaum*** – Village of Key Biscayne
- **Brandon Perry** – Raposa Perry Young, LLC
- **Angela Poole** – AMP Expert Solutions, LLC
- **Marie Rosier*** – Marie M Rosier CPA, MBA LLC
- **Amy Santos** – State College of Florida
- **Rick Shapiro** – Bergman Hirsch Spilfogel & Tyman CPAs
- **Rick Smith** – Retired
- **Michael Stone** – Stone, Parker & Company, CPA, PA
- **Ken Strauss** – Berkowitz Pollack & Brant
- **Paola Suarez** – South FL Business Banking – Chase
- **Karen Vergara** – Allgen Financial Advisors

*New Board of Trustee

Weaver Expands Oklahoma City Tax Practice

Weaver, a top-35 national CPA and advisory firms recently announced the addition of two partners: Mark Sheets and Kirby Ross, along with several tax team members including senior manager Rhonda Goddard. Mark Sheets brings to the firm more than 37 years of experience in the accounting profession, including nearly a decade with Ernst & Young.

Mark serves both business and individual tax clients in the oil and gas, real estate and nonprofit industries, as well as large family offices. Kirby Ross, who joined HSPG in 2010 after 10 years with Eide Bailly, has more than 25 years of experience serving business and individual tax clients in the oil and gas, real estate, construction, health care and nonprofit industries. He also serves large family groups. Rhonda Goddard joined HSPG in 1997 after serving as a tax manager with PwC. She has more than 28 years of experience serving oil and gas, high net worth family groups and nonprofit clients.

Baker Newman Noyes Announces Eight Senior Promotions in Maine, Massachusetts, and New Hampshire

Baker Newman Noyes (BNN), one of the nation's top 100 accounting and advisory firms recently announced eight senior-level promotions in its Boston, Manchester, Portland, and Woburn offices, effective July 1.

Sophie Wang, CPA, was promoted to manager in the assurance practice. Wang earned her bachelor's degree in economics from the University of Minnesota and her master's degree in accounting from Boston College and joined the firm in 2015.

Jiten Kariya, CA, was promoted to manager in the tax practice. He is a Chartered Accountant specializing in international tax and transaction tax services. Kariya has been with the firm since 2019.

Jennifer Fontaine, MBA, was promoted to office admin manager in the operations department. She earned a bachelor's degree in business administration, with a minor in international business, and a master's degree in business from Husson University.

Marissa Mamet, CPA, was promoted to manager in the tax practice. She earned a bachelor's degree in business administration, with a concentration in accounting, from the University of Massachusetts.

Joseph Begin, CPA, of South Portland, Maine, was promoted to manager in the tax practice. He earned a bachelor's degree in business administration, with a concentration in accounting, magna cum laude, from the University of Maine, and a master's degree in accounting from Saint Joseph's College.

Matthew Fernandez, CPA, of Kennebunk, Maine, was promoted to senior manager in the assurance practice. He earned a bachelor's degree in economics from the University of Southern Maine.

Jaclyn Soderlind, CPA, of Kennebunk, Maine, was promoted to senior manager in the tax practice. She earned a bachelor's degree in accounting and a master's degree in taxation from Bentley University.

Justin St. John, CPA, of Harrison, Maine, was promoted to manager in the assurance practice. He earned bachelor's degrees in accounting and finance, summa cum laude, from the University of Maine.

Promotions Announced by Accounting Firm Gumbiner Savett

Gumbiner Savett Inc., a full-service accounting and consulting firm headquartered in Santa Monica, California recently announced the following promotions:

- Tara Wilson to Tax Principal
- Vivian Cha to Tax Senior Manager
- Kimberlie Shiao to Audit & Accounting Senior Manager
- Suresh Narayanamoorthy to Tax Manager
- Kathryn Hoppers to Tax Senior
- Yvette Zhu to Audit & Accounting Senior
- Megan Jiang to Audit & Accounting Senior

New Partner Rob Nowak Joins Weaver's Dallas Office

National certified public accounting (CPA) and advisory firm Weaver, a top 35 firm in the United States, has added Rob Nowak as a partner in its Dallas office. Rob brings 25 years of public accounting experience, providing proactive tax consulting and planning services to businesses and family offices across multiple industries, with a concentration in the real estate and construction industries.

Nowak earned a Masters of Tax and Taxation from DePaul University and a Bachelor of Science in Accountancy from Northern Illinois University.

Herbert Chain Joins Marks Paneth as Senior Director in Firm's Professional Standards Group

Leading accounting, tax and advisory firm, Marks Paneth LLP, has announced that Herbert M. Chain, MBA, CPA, has joined the firm as a Senior Director in the Professional Standards Group in the New York office. To this role, Mr. Chain brings more than four decades of business, audit and accounting experience.

Mr. Chain joins an established team of professionals responsible for reviewing the firm's attest engagements and ensuring adherence to all professional standards.

Prior to joining Marks Paneth, Mr. Chain was the Principal & Managing Member of his own consulting business and a Senior Audit Partner at a Big 4 accounting firm.

UHY Advisors Hires Two Tax Leaders in Houston

UHY Advisors, Inc., (UHY), one of the nation's leading accounting and professional services firms, announced that Matt Martina, CPA, and Todd Sutherland, J.D., LL.M. (Taxation), have joined the team as tax leaders working out of UHY's Houston Office.

Matt Martina has joined as Managing Director of International Tax Services, providing international tax services to clients in Houston, as well as nationally. He has more than 25 years of experience in international business planning and tax

consulting and has a Bachelor of Science degree in accounting from St. Francis University.

Sutherland is new to UHY as the Director of the Research and Development Tax Credit practice. He has over 20 years of experience assisting taxpayers with claiming R&D tax credits, as well as extensive experience in defending R&D tax credit claims under IRS examination.

Sutherland has a Bachelor of Science degree in accounting from Millsaps College, a LL.M. in Taxation from University of Miami School of Law, and a J.D. from Mississippi College School of Law.

Padgett Business Services names Jeff Phillips new CEO

Padgett Business Services, one of North America's largest accounting and business consulting providers, has named Jeff Phillips as the company's new CEO. Phillips, an accomplished accounting industry leader and entrepreneur, will focus on franchisee support and growth, as well as increasing investments in new technologies and software to empower the Padgett brand.

Phillips is the co-founder of Accountingfly, an innovative, web-based platform that matches accounting firms with local and remote talent.

Prior to his entrepreneurial turn with Accountingfly, Phillips worked with Monster.com, developing online recruitment strategies and solutions for several Fortune 500 companies. He has a bachelor's degree in economics from Baylor University, as well as a Masters of Business Administration from Southern Methodist University. Jeff also is a member of the CPA Consultants Alliance.

Prime Global Welcomes Mexican Firm Asfico as Newest Member

PrimeGlobal, one of the top five associations of independent accounting firms in the world, recently welcomed Mexican firm ASFICO as its newest member in the Latin America region.

ASFICO is richly experienced in accounting and tax matters and has cultivated long-term relationships with clients during its seventy-five years of service. The firm values trust, loyalty and an ethical approach when delivering professional services, ensuring clients receive the highest quality assistance in all accounting matters.

Xero Appoints Director to Lead Growth in U.S. Hispanic Market

Xero, the global small business platform, recently announced the appointment of Jackeline Velez to Director, US Hispanic market, to support one of the fastest-growing language demographics in the US small business economy.

According to a report from the US Hispanic Chamber of Commerce, nearly 4.4 million Latino-owned businesses in the US generate more than \$700 billion in revenue to the US economy.

Jackeline will lead the US Hispanic team and oversee efforts in support of Hispanic small business owners in Xero communities across the United States.

Before joining Xero in 2016, Jackeline spent 10 years working in public accounting and industry at PwC, Flotek Industries and Schlumberger. In 2019, Jackeline was recognized by Practice Ignition as one of the [Top 50 Women in Accounting](#).

Advisory • Firm Management • Technology • News

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

