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Jan. 11, 2021



Warren Averett has promoted seven individuals to Members of the Firm. Warren Averett is extremely proud of these individuals' demonstrated commitment to the firm and its values.

JOSHUA BOWEN, CPA, CGMA, CAMS (Audit, Montgomery) Josh provides audits and compliance consulting to the financial institutions and public sector organizations. He has largely focused his practice on providing external and internal audits and Bank Secrecy Act (BSA)/Anti-Money Laundering (AML) compliance consulting.

JARED KOECHNER, CPA (Tax, Birmingham) Jared specializes in tax planning and compliance for financial institutions. Jared also provides corporate tax compliance and planning services for privately-held and private-equity owned businesses in a variety of other industries. He helps clients navigate multistate tax compliance and accounting for income taxes.

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offering insight about investing, estate planning and wealth management, and he is responsible for building and strengthening client relationships and growing Warren Averett Asset Management in the Montgomery area.

VAN TREFETHEN, CPA (Tax, Birmingham) Van specializes in tax planning and compliance for closely-held and private-equity owned businesses, and he provides financial statement reviews and compilations. He is a leader of the Firm's Paycheck Protection Program Taskforce and is an accomplished thought leader about tax issues.

ALEXIS WILLIS, CPA (Tax, Foley) Alexis provides individual and corporate tax planning, tax code compliance services, multi-state tax services and outsourced accounting and CFO services to clients in a wide variety of industries.

“Warren Averett is proud of these individuals, their accomplishments and their new designations as Members of the Firm,” said Mary Elliott, Chief Executive Officer of Warren Averett. “These new Members truly exemplify what Warren Averett is all about—going above and beyond to be the best resource possible for our clients, whether that means offering professional expertise, building relationships or serving their communities and the people in them. Our Firm is excited to watch these individuals excel as Members of Warren Averett.”

Firm Management

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