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firms and companies in the accounting profession and technology space.

Jan. 19, 2021



Professionals on the Move is a periodic roundup of recent promotions and hires at firms and companies in the accounting profession and technology space.

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Science degree from the University of Wisconsin at Madison, her Lean Six Sigma Green Belt from The Ohio State University and her Lean Six Sigma Black Belt certification from the University of Georgia.

Hubbard joined Boomer Consulting, Inc. in 2009 with years of experience in project management and marketing communications. Hubbard received his Bachelor's degree in Marketing from Missouri State University in Springfield, Missouri and a Master's in Business Administration from Southeast Missouri State University in Cape Girardeau, Missouri. He is also a Storybrand Certified Guide and Certified Kolbe Consultant.

Global Tax Management announces newly promoted Managing Directors and Associate Directors.

Global Tax Management recently announced three promotions in their Philadelphia Metro Office.

Michael Tighe, Managing Director

For the past 15 years, Michael's career with GTM has spanned every role from Senior Analyst through Managing Director. He is a dedicated team leader and a key driver of GTM's Tax Technical Committee.

Michael DiBianca, Associate Director

Michael has been a driving force within GTM since 2008, providing leadership and expertise to large multinational corporations. Mike has held multiple roles since joining the firm nearly 15 years ago, and his tireless energy and passion for the firm have been a cornerstone of the practice's growth and client retention.

Anthony DiGiuseppe, Associate Director

Since beginning his tax career with GTM in 2005, Anthony has championed the

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In her new role, Wendy will focus on growing the audit & attest department along with assisting the mutual insurance segment in reaching their goals.

Wendy holds the Advanced Defined Contribution Plans Audit Certification from the AICPA and is licensed as a CPA in both Iowa and Minnesota. A resident of North Mankato, Wendy enjoys reading and spending time with her family, including husband Jason and sons Parker and Luke, at various youth sporting events.

Warren Averett Announces 2021 New Members

Warren Averett is proud to announce that seven individuals have been promoted to Members of the Firm.

JOSHUA BOWEN, CPA, CGMA, CAMS (Audit, Montgomery) Josh provides audits and compliance consulting to the financial institutions and public sector organizations.

JARED KOECHNER, CPA (Tax, Birmingham) Jared specializes in tax planning and compliance for financial institutions, and helps clients navigate multistate tax compliance and accounting for income taxes.

HEATHER LOCKLAR, J.D. (Estate, Birmingham) Heather helps clients reach their personal and legacy goals by assisting them in crafting meaningful, impactful estate plans. She also advises on effective business succession planning techniques.

CLAIBORNE MORRIS, CPA (Tax, Birmingham) Claiborne specializes in planning and executing tax strategies, and he helps clients navigating transactions. His primary focus is in the construction and real estate sector.

BARRY PRIM, MBA (Asset Management, Montgomery) Barry assists clients by offering insight about investing, estate planning and wealth management, and he is responsible for building and strengthening client relationships.

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The Institute of Internal Auditors (IIA), the internal audit profession's most widely recognized advocate, educator, and provider of standards, guidance, and certifications, has named Anthony J. Pugliese as the association's new President and CEO.

Over a career spanning more than 30 years, Pugliese has overseen the internal audit function of a major organization, directed strategic expansions into major global markets, pioneered innovative educational initiatives aimed at enhancing members' professional growth, and defined cultural norms toward greater diversity, equity, and inclusiveness.

As CEO of the IIA, he will drive the vision and management of a nearly 80-year-old organization with more than 200,000 members, 156 chapters, and 112 affiliates in nearly 200 countries and territories.

Irina Kimelfeld Joins Eisneramper As a Tax Partner in the Financial Services Group

EisnerAmper LLP is pleased to announce that Irina Kimelfeld has joined the firm as a tax partner in the Financial Services Group.

Irina has more than 20 years of experience providing tax planning and compliance services to private equity funds, hedge funds, funds of funds, investment advisors, and other financial services companies.

Irina, who is based in EisnerAmper's New York City headquarters, has a B.S. in Business Administration and an M.S. in Taxation from the University of Southern California. She is a member of the American Institute of CPAs and an adjunct professor at the Fordham University Gabelli School of Business.

UHY Advisors appoints ten new managing directors, largest group in firm's

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a wide range of audit and assurance services including financial audit, forensic audit, compliance audit, reviews, compilations, internal control assessments and other accounting advisory services. Farrelly received his B.S. in Accounting and Business Management from Manhattan College and is a licensed CPA in the state of New York.

Don Felmlee is a managing director of UHY Advisors in the Great Lakes. Felmlee specializes in assisting companies in developing and implementing strategic plans to improve operations, protect assets and maximize profitability. Felmlee received his B.A. in Accounting from Northwood University and is a licensed CPA in the state of Michigan.

Eric Hennessey is a managing director of UHY Advisors in the Northeast. He has more than 20 years of experience managing audit engagements for a variety of clients, with a "hands-on" approach to controlling and coordinating engagement details. Hennessey received his B.B.A. from Siena College and an M.B.A. in Professional Accountancy from Siena College and is a licensed CPA in the state of New York.

Nancy Johnson is a managing director of UHY Advisors in the Mid-Atlantic. She is a leading member of the audit and assurance practice with 30 years of experience and specializes in working with nonprofits. She received her B.S. in Business Administration in Accountancy from Auburn University and is a licensed CPA in the state of Maryland and in Washington D.C.

Daniel Jones is a managing director of UHY Advisors in the Northeast. He is a leader of the audit and assurance group and has extensive knowledge of SEC reporting requirements for companies ranging in size from small to large accelerated filers, and was recently named an "Emerging Leader" by the M&A Advisor. He received his B.S. from Monmouth University and is a licensed CPA in the state of New York.

Jody Lurk is a managing director of UHY Advisors in the Midwest. She has nearly 20

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and compliance. Pisciotta received her B.S. in Accounting from Illinois State University and is a licensed CPA in the states of Missouri and Indiana.

Eric Ribachonek is a managing director of UHY Advisors in the Northeast. He has been an employee of the firm for over a decade and is responsible for servicing a range of clients from emerging businesses to Fortune 500 companies across the globe and is a recent winner of the M&A Advisor's "Emerging Leaders" award. He received his M.B.A. from Clarkson University and is a licensed CPA in the state of New York.

Stephanie Rosenbaum is a managing director of UHY Consulting and is a leader of the Resource Solutions Group in the Great Lakes. Rosenbaum specializes in both providing upper-level and executive accounting and finance support to companies with interim and permanent placement needs. Rosenbaum received her B.S. in Finance and Marketing from the Stephen M. Ross School of Business at the University of Michigan.

Kate Vasiliev is a managing director of UHY Advisors in the Mid-Atlantic. She is a leader in both attestation and tax practice, with significant experience in audits and multi-state tax preparation. Vasiliev's industry expertise includes manufacturing and distribution, real estate and nonprofits. She received her B.S. and her M.S. in Business Economics and Management, from BIP Institute of Law, and is a licensed CPA in the state of Maryland.

PKF Texas Promotes Three New Directors

Pannell Kerr Forster of Texas, P.C. (PKF Texas) is pleased to announce three team members' promotions to Director:

- Nicole Riley, CPA, CFE, Audit Director
- Chris Dodd, CPA, Tax Director

- Emily Smikal, CPA, Tax Director

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energy and utility services, professional services, and owner-managed businesses.

Smikal started her career in 2009 at PKF Texas, and her experience covers a variety of tax areas with a focus on serving high net-worth individuals, family and middle market enterprise clients and their owners, as well as not-for-profit organizations.

Kaufman Rossin's Louis Guay Joins Board of Miami Center for Architecture and Design

Kaufman Rossin, one of the top 100 CPA and advisory firms in the U.S., recently announced that Tax Principal Louis O. Guay, MBA has joined the board of directors of the Miami Center for Architecture and Design (MCAD).

The Miami Center for Architecture and Design created a space for anyone who is interested in design and architecture, providing "meeting space and educational programs to enhance public appreciation for architecture and design."

Guay leads Kaufman Rossin's specialized research and development (R&D) tax credit and cost segregation service lines. He works with a variety of clients to generate substantial tax savings, especially in the construction, real estate, technology, manufacturing, and healthcare industries.

Stetson University Professor Appointed to Task Force

[Valrie Chambers, PhD](#), associate professor of accounting at [Stetson University](#), has been appointed to the Diversity + Inclusion Advisory Task Force of the [Florida Institute of Certified Public Accountants \(FICPA\)](#).

Chambers said FICPA's dedication to building and supporting a diverse talent pipeline influenced her willingness to serve on the task force. The charge: to develop, design and implement diversity, equity and inclusion programs, provide input on

future diversity initiatives, create resources and obtain feedback on establishing a

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Stemmler is a financial adviser with Riverstone Wealth Advisory Group in Midlothian, Va., a private wealth advisory practice of Ameriprise Financial Services, Inc. He currently serves as president of the FPA of Central Virginia and serves on the Financial Empowerment Board for the City of Richmond Treasurer's Office. Stemmler earned a Bachelor of Science degree in Financial Planning and Real Estate from Virginia Commonwealth University.

FPA NexGen also announced the addition of eight new members to its Leadership Committee. Each new committee member is serving one or two-year terms effective Jan. 1. The new FPA NexGen Leadership Committee members are:

- **Megan Abbott, EA, MBA, MA (PR Coordinator)** —President of Trajectory Financial Planning in Denver, Colo.
- **Amie Agamata, CFP®, ChFC®, RICP®, AIF® (Local Leader Coordinator)** —Associate Wealth Management Advisor and Director of Investments & Planning at Northwestern Mutual in San Diego, Calif.
- **Kevin R. Clark, EA, CFP®, CIMA® (President-elect)** —Financial Advisor and Investment Manager at Highview Advisor Group in Columbus, Ohio.
- **Erica James, CPA (Gathering Co-Coordinator)** — Client Advisor at Sullivan, Bruyette, Speros & Blayney, Inc. in McLean, Va.
- **Soraya Morris, ChFC® (National Coordinator)** — Lead Trainer at Envestnet MoneyGuide in Richmond, Va.
- **Christopher Stroup, MBA (National Coordinator)** — Financial Advisor at Abacus Wealth Partners in Santa Monica, Calif.

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that Stewart Liebling has returned to the firm as a Principal in the Entrepreneurial Services department.

Liebling started his accounting career at Kaufman Rossin in 1983. After five years' tenure, he formed his own accounting practice where he assisted individuals and small businesses in a variety of ways. After 32 years supporting the local small business community, Liebling returns to Kaufman Rossin with his decades of accounting and entrepreneurial experience.

Liebling is a long-time Miami resident and has been instrumental for the local small business community, especially for businesses in the legal, healthcare, real estate, retail, and professional services industries.

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