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Mary Girsch-Bock • Dec. 17, 2021



Professionals on the Move is a round-up of recent hiring and promotions in and around the accounting profession.

Whitley Penn Announces New Partners

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(TXCPA).

- **Joe Lavis, CPA** – Joe joined Whitley Penn in 2011 and has significant experience advising clients on tax and advisory matters with a focus on partnerships, corporations, and high-net-worth individuals. He is a Member of the American Institute of Certified Public Accountants (AICPA), the Texas Society of Certified Public Accountants (TXCPA) and serves on the Executive Committee for the Dallas Chapter of the Council of Petroleum Accountants Society (COPAS). Joe received his B.B.A. in Accounting from Baylor University.
- **Kristen Sayegh, CPA** – Kristen joined Whitley Penn in 2012. Her tax practice has centered around working with families, entrepreneurs, closely held businesses, and high-networth individuals. She is currently a member of the Houston Estate and Financial Forum, American Institute of Certified Public Accountants (AICPA) and the Texas Society of Certified Public Accountants (TXCPA. Kristen received a B.B.A. and M.B.A. from the University of Houston-Victoria.
- **Patrick Simmons, CPA** – Patrick joined Whitley Penn in 2013 and has more than nine years of experience serving public sector clients including school districts, higher education, local municipalities, special-purpose districts, and nonprofit organizations. Patrick is a member of American Institute of Certified Public Accountants (AICPA) and Texas Society of Certified Public Accountants (TXCPA) and received his Master's in Accounting from the University of Houston – Clear Lake and his undergraduate degree from Texas A&M University.
- **Roger Tovar, CPA** – Roger joined Whitley Penn in 2021 and is currently an Audit Partner within the firm's Public Sector group, with more than 16 years of experience in auditing and performing other attest engagements. He is a member of the Government Finance Officers Association (GFOA), Special Review Committee (SRC), American Institute of Certified Public Accountants (AICPA), and Texas Society of Certified Public Accountants (TXCPA). Roger attended Angelo State University where he earned his B.B.A. in Accounting.

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and financial challenges that impact their business. The Tax practice team assists with domestic and foreign tax analysis and filings, IRS audits, income tax provisions, tax credit incentives, state tax nexus studies, and assistance with merger and acquisition transactions.

“With the expansion of our specialty services and the growth of many other offerings, 2021 has been a strong year for the Tax practice and BPM as a whole,” said West. “I’m excited to lead the practice forward by teaming with our professionals in [Southern California](#) and across the country. Top-notch client service isn’t just an expectation, it’s a practice on which our clients can depend, and Tom set the bar for delivering exceptional client service as well as developing many specialty tax services at BPM. We are well poised to help our clients with the issues they are facing during the pandemic, including employee relocation, international expansion, and additional scrutiny from investors and the SEC.”

One of the youngest CPAs to make partner at BPM, West has more than 15 years of public accounting experience, working with clients in the pharmaceutical, medical device and technology spaces. Her client work deals extensively with tax provisions, Section 382 studies to determine limitations on tax attributes and advising companies in merger and acquisition transactions. As a testament to her outstanding work, West was recognized in [Silicon Valley Business Journal's 40 Under 40 awards](#) in 2020 and in the [San Francisco Business Times' list of Most Influential Women in Business](#) in 2010.

Citrin Cooperman Admits Three New Partners

Top professional services firm Citrin Cooperman announced today the joining of three partners, [Victoria Moss](#), [Anthony Mazza](#), and [Shakeel Hussain](#).

Moss brings over 30 years of public accounting experience to their [Woodland Hills](#),

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opportunity and strategic solutions for her clients, which is exactly the kind of advisor we look to have join our team.”

Modern Bookkeeping Fintech Zeni Expands C-suite With Key Executive Hires

AI-powered finance concierge [Zeni](#) recently announced the appointment of Carl Hekkert as Chief Financial Officer of Customer Success and Collin Cadmus as Chief Revenue Officer, both the first executives to hold the roles at the company. Hekkert and Cadmus join at a time of rapid expansion in Zeni's business. Following the company's \$34 million Series B funding round in August 2021, Zeni has doubled its headcount from 60 employees to more than 120 in the last six months and plans to nearly double its existing headcount by the end of 2022.

In his new role as Chief Financial Officer of Customer Success, Hekkert will provide leadership for Zeni's client-facing finance teams and drive transformational finance, partner development, and process initiatives across Zeni's platform. In addition to serving as Zeni's head of finance, his primary objective is to drive client success by developing a world-class controllership team and working closely with the development team to continue building Zeni's best-in-class finance dashboard.

As Zeni's first Chief Revenue Officer, Cadmus will oversee sales, marketing and revenue operations with a goal of designing a customer experience that aligns with the needs and wants of the modern buyer. His primary objective is to drive the growth of Zeni through new, innovative approaches to sales and marketing, and he is responsible for building an organization where all revenue-generating functions of the business are aligned and seamlessly integrated.

Worsham Joins Citrin Cooperman

Citrin Cooperman, one of the nation's largest professional services firms. recently

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utilizes a unique business view when it comes to taking a big-picture approach with his clients. Previously, he was the Senior Managing Tax Director at NKSFB, a large national business management firm, where he led the NKSFBGO tax division in Encino, CA, as well as coordinated as a tax leader within the firm overall.

NFRC Members Elect Two New Directors to Board

The National Fenestration Ratings Council (NFRC), a nonprofit organization that administers a voluntary, uniform rating, labeling, and certification system for the energy performance of windows, doors, curtain walls, skylights, and other fenestration products recently welcomed two newly elected members of the board of directors for three-year terms beginning in 2022 — Helen Sanders of Technoform, North America, and Zachary Flora from the Center for Active Design.

New board members:

Helen Sanders, Technoform, North America General Manager

Helen has over 25 years of experience in glass technology, market development and manufacturing, especially in functional coatings, insulating glass, and thermal zone technology for fenestration. She has worked with a range of industry participants from architects and engineers to fenestration and glass fabricators through the full design, construction process, including testing and certification.

Zachary Flora, Center for Active Design Vice President, Market Growth

Zach is an active Fitwel Ambassador working to advance healthy building practices. For the last 3+ years he has worked for the Center for Active Design, operator of the Fitwel Certification System. He leads the growth and expansion of Fitwel, focusing on entering new sectors and new regions. Before Fitwel, Zach worked in strategic

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recently announced that Managing Partner, [Larry S. Autrey](#), has been named to D CEO's Dallas 500 List.

Autrey, CPA, ABV and Managing Partner of Whitley Penn, has more than 30 years of tax, advisory and business valuation experience focused on public and private clients. His areas of practice include mergers and acquisitions, manufacturing, distribution, profit enhancement, professional services, business valuations and estate planning. Autrey earned his B.B.A in Accounting and Finance from Texas Tech University and an MBA with a Data Analytics concentration from Abilene Christian University.

Autrey is the Former Chairman for the Major Firms Group, a member of the American Institute of Certified Public Accountants (AICPA), and a member of the Texas Society of Certified Public Accountants (TXCPA).

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