

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

Mary Girsch-Bock • May. 16, 2022



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

Felix Lozano Named Dallas Metropolitan YMCA Board Chairman

Whitley Penn Chief Growth Officer, [Felix J. Lozano, III CPA, CFE](#), has joined the

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

passion for forensic and fraud auditing, Lozano now turns his attention and talents towards internal and external growth initiatives for Whitley Penn. In addition to being a Certified Public Accountant, Lozano is a Certified Fraud Examiner.

A former Advisor and Chairman for the Nexia International Audit Committee and former Chair of Nexia's International Digital Committee, Lozano is a member of the Texas Society of Certified Public Accountants (TXCPA), Dallas Chapter of the TXCPA, American Institute of Certified Public Accountants (AICPA) and the Association of Certified Fraud Examiners (ACFE).

Lozano received a BBA in Accounting from Texas Christian University and is an alumnus of Ernst & Young.

Manatt Expands Tax Incentive Financing Capabilities with Chicago Arrival

Manatt, Phelps & Phillips, LLP, a multidisciplinary, integrated professional services firm, recently announced that Manatt Financial Services Partner [Sameer V. Patel](#) has joined its Chicago office. Patel's focus on the syndication of federal and state New Markets Tax Credits further strengthens the Firm's work in helping drive social impact investments for clients ranging from institutional and corporate investors to community development entities and real estate developers nationwide.

Patel's work includes guiding clients through Opportunity Zone investments, low-income housing and historic rehabilitation tax credit matters. Also a respected thought leader, he frequently speaks at some of the industry's top conferences on the gamut of tax credit-related topics.

Manatt has been strategically expanding its capabilities in Chicago across key industries—including antitrust, health care and financial services—with Patel joining recent hires [Stephen D. Libowsky](#), [Megan Thibert-Ind](#) and [Bryan A. Schneider](#). He is also the latest arrival in the Firm's broader, national growth strategy

as it deepens its capabilities in digital and technology ([Timothy Lohse](#) and [Michel C.](#)

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

Regional premier advisory firm, Brown Schultz Sheridan & Fritz (BSSF), announced the following new hires in Pennsylvania and Maryland:

Denise A. Altieri joined the BSSF Small Business Accounting Services team. She brings over 30 years of bookkeeping and administrative experience to the Firm. Denise is located at the BSSF office in Frederick, Maryland.

Michael D. Azzato joined BSSF as a Tax Staff Accountant. He holds a B.S. degree in Neuroscience and a B.A. degree in Philosophy from the University of Scranton as well as a B.S. degree in Accounting from Penn State Harrisburg. He is located at the BSSF office in Camp Hill, Pennsylvania.

Ethan J. Clark joined BSSF as an Audit Staff Accountant. He earned his Bachelor of Science degree from Liberty University. Ethan is a veteran law enforcement professional with over 20 years of experience transitioning to a role in the accounting industry. He is located at the BSSF office in Camp Hill, Pennsylvania.

Scott W. Romberger joined BSSF as the Client Advisory Services (CAS) Senior Advisor. He has 35 years of experience in accounting and will assist in providing outsourced CFO services to clients. He is located at the BSSF office in Camp Hill, Pennsylvania.

AbacusNext Announces the Addition of Jennifer Sherman as Chief Product and Experience Officer and Mike Summers as Chief People Officer

AbacusNext, a leading software provider for legal and accounting professionals, announced the company has added Jennifer Sherman as chief product and experience officer and Mike Summers as chief people officer to the executive team.

Sherman comes to AbacusNext with extensive experience in the enterprise B2B

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

an executive advisor to Thomas H. Lee Partners where he held interim leadership roles across five different THL companies, including AbacusNext.

For more information on Sherman and Summers, visit abacusnext.com/leadership.

Advisory • Benefits • Firm Management • Technology

CPA Practice Advisor 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.

© 2024 Firmworks, LLC. All rights reserved