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## ACCOUNTING

# 11 CPAs Honored by AICPA and CIMA

The awards highlight CPA efforts in a specific accounting specialty area, excellence in volunteer efforts or significant contributions to the accounting profession.

Isaac M. O'Bannon • Jun. 08, 2023



A conference attendee walks past signage at the 2023 AICPA Engage conference, June 6, 2023. Credit: Isaac O'Bannon.

The American Institute of CPAs and Chartered Institute of Management Accountants honored eleven CPAs during AICPA & CIMA ENGAGE 2023 in Las Vegas this week. The awards highlight CPA efforts in a specific accounting specialty area, excellence in volunteer efforts or significant contributions to the accounting profession.

Awards presented include the P. Thomas Austin Scholarship, Personal Financial Planning Distinguished Service Award, Sid Kess Award and Standing Ovation awards for both Personal Financial Planning and Technology Advisory.

“The CPA members awarded during the ENGAGE conference display a commitment to excellence, represented in their work and the respect they earn from their peers,” said Eva Simpson, vice president of tax practice and financial planning for the Association of International Certified Professional Accountants, which combines the strengths of the AICPA and CIMA. “The strength of these achievements is rooted in their passion for the profession and quality of their actions. Each recipient is an example of a CPA professional who embodies the integrity, trust and determination needed to be successful in this field.”

## **Personal Financial Planning (PFP) Division Distinguished Service Award**

Richard (Dick) J. Fohn, CPA/PFS, was presented with AICPA’s 2023 Personal Financial Planning (PFP) Distinguished Service Award, which recognizes an AICPA member who meritoriously contributes to the advancement of personal financial planning, best exemplifies a CPA financial planner and serves the public’s interest by enhancing the quality of personal financial planning services.

Fohn is the current President & CEO of Fohn Consulting in Bellingham, Washington.

Fohn’s volunteer service with the AICPA began 18 years ago. He has served on six committees or task forces during that time, twice as chair.

He has played a key role in the success of the PFP section and its initiatives, reinvigorating the committee and creating strategy, resulting in the section becoming one of the best offerings in the marketplace. He served on the task force that worked to gain consensus on the AICPA Statement on Personal Financial Planning Services that eventually got approved for public exposure and eventual adoption.

In addition to his volunteer service, Fohn supported the PFP section by having everyone from his former firm join the section as well as other membership sections, starting in 2014.

## **P. Thomas Austin Personal Financial Planning Scholarship**

Joseph Gutierrez, CPA/PFS, Total Wealth Group, Agoura Hills, CA, was awarded the 2023 P. Thomas Austin Personal Financial Planning (PFP) Scholarship.

CPAs who have fewer than 10 years of experience are eligible to be considered for the scholarship, which covers the cost of attending the AICPA's Advanced Estate Planning Conference, as well as the related travel expenses. The AICPA established the scholarship in 2010 to honor P. Thomas Austin, a CPA who chaired the Advanced Estate Planning Conference for three decades and is currently chair emeritus.

Joseph is a highly experienced CPA/PFS with many years of experience in the accounting field. Throughout his career, he has specialized in tax compliance and planning, trust analysis, estate and gift tax planning, and investment partnerships. He has advanced expertise in working with high-net-worth individuals, as well as businesses in various industries including construction, entertainment, medical, law, not-for-profit, service, manufacturing, mortgage banking, and distribution.

Joseph is passionate about helping his clients achieve their financial goals and providing them with the best possible service. He earned his bachelor's degree in accounting with Honors from San Diego State University's Charles W. Lamden School of Accountancy.

## **Sid Kess Award for Excellence in Continuing Education**

The Sid Kess Award for Excellence in Continuing Education was presented to Annette Nellen, CPA, CGMA, Esq. Nellen is a professor in and director of San José State University's (SJSU) graduate tax program (MST), teaching courses in tax research, accounting methods, individual tax, property transactions, employment tax, ethics, leadership, and tax policy.

Nellen is a past chair of the AICPA Tax Executive Committee and presently serves on the AICPA IRS Advocacy & Relations (ARC) Committee and chairs the AICPA Virtual Currency – Digital Asset Tax Task Force. She co-chaired the AICPA/NASBA Tax Compliance and Planning Task Force working on curriculum information related to the new CPA Evolution licensure model. Nellen also serves on CalCPA's Accounting



Education Committee. In January 2023, she was appointed to the IRS Advisory Council (IRSAC).

She is the recipient of the 2013 Arthur J. Dixon Memorial Award given by the Tax Division of the AICPA, the highest award given by the accounting profession in the area of taxation. Prior to joining SJSU in 1990, Annette was in practice for ten years in financial reporting for a large public company, the IRS and a Big 4 CPA firm.

## Standing Ovation Honors

The American Institute of CPAs honored eight CPAs, all age 40 and under, for contributions to their specialty area with the Standing Ovation award.

The AICPA's Standing Ovation program recognizes young CPAs who exhibit exemplary professional achievement in personal financial planning, business valuation and forensic accounting, and information management and technology assurance. Beyond making a notable contribution to the profession, nomination requirements include maintaining an active CPA license, being an AICPA member in good standing and holding either the Personal Financial Specialist (PFS), Certified Information Technology Professional (CITP), Certified in Financial Forensics (CFF), or Accredited in Business Valuation (ABV) credential.

## Personal Financial Planning Standing Ovation

The four recipients of the Personal Financial Planning (PFP) Standing Ovation all hold the PFS credential and were acknowledged during the [Advanced Personal Financial Planning track](#) at ENGAGE. They are (in alphabetical order):

- **Alexandra Demosthenes, CPA/PFS**, Investment Advisory Professionals LLC, Boca Raton, FL
- **Lincoln Fleming, CPA/PFS**, Blackrock, Highland, UT
- **Dean Shill, CPA/PFS**, Katapult Wealth Partners LLC, Plano, TX
- **Jeff Wilson, CPA/PFS**, The W2 Group, Clinton, MD

## Technology Advisory Standing Ovation

The four recipients of the 2023 Technology Advisory Standing Ovation award all hold the CITP credential and were recognized during the [TECH+ track](#) at ENGAGE. They are (in alphabetical order):

- **Susan Allen, CPA/CITP, CGMA**, Ceridian, Browns Summit, NC

- **Sohaib Iqbal, CPA/CITP, CISA**, Verizon, Bensalem, PA
- **Randy Kardas, CPA/CITP, MBA**, Cherry Bekaert Advisory LLC, Manheim, PA
- **Mac Lillard, CPA/CITP, CFE, CISA, CRISC**, GRF CPAs and Advisors, Arlington, VA

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