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Mary Girsch-Bock • Jul. 31, 2023



*Professionals on the Move* is a round-up of recent hiring and promotion announcements from across the accounting space.

### **Schneider Downs Announces Seven Additions to Ownership Group**

Schneider Downs, one of the 60 largest certified public accounting and business advisory firms in the United States, recently announced the addition of seven new

shareholders to its ownership group.

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services to both public and privately held companies, primarily those within the construction and manufacturing sectors. He also has extensive experience serving the employee benefit plans of his clients. Ryan received both his Bachelor's and Master's degrees from West Virginia University.

**Woodrow M. Morris** has over 10 years of public accounting experience in various areas of tax compliance and consulting. He is experienced in working with the management of closely held businesses in implementing tax-planning strategies, as well as providing private equity and capital groups with tax forecast, advisory and compliance-related services. He received both his Bachelor's and Master's degrees from Robert Morris University

**Brett T. Cubellis** has more than 10 years of experience providing tax advisory services to privately-held corporations, partnerships, LLCs and individual clients, advising on various issues involving federal, international and state and local tax matters. Brett's primary focus is on tax planning, research and compliance issues for corporate and pass-through entities as well as individuals. Brett is a graduate of Youngstown State University.

**James A. Sayre** has more than 15 years of experience consulting and advising public and privately held clients in the areas of income and franchise taxation. James is one of the firm's leading experts in accounting for income tax, including accounting for mergers and acquisitions, in accordance with ASC 740. He has served clients in various industries, including healthcare, retail, manufacturing, technology and professional services. James is a graduate of Youngstown State University.

**William M. Deller Jr.** has over 10 years of experience providing high-quality consulting, advisory and auditing services to clients across various industries, particularly in healthcare, technology, financial services, higher education, professional services and energy. William leads the Third-Party Risk Management

(TPRM) practice at Schneider Downs in program design, execution, and innovative

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**Peter J. Lieberman** currently serves as Chief Executive Officer of Schneider Downs Corporate Finance, LP. In this role, Peter is responsible for managing transaction and business development activities for SDCF's middle-market mergers and acquisitions, as well as the real estate investment banking practice. Peter received his Bachelor's degree from Duke University and his Master's degree from Indiana University School of Business.

### **Sachs joins CohnReznick as Assurance Partner**

CohnReznick LLP, one of the leading advisory, assurance, and tax firms in the United States, recently announced that **Scott Sachs** has joined the firm as a partner in its Assurance practice. Sachs has 20 years of audit experience serving private equity and public company clients with a focus on the manufacturing and distribution and consumer industries, as well as software and technology services.

Sachs has extensive experience advising large and middle market private equity clients and their portfolio companies on mergers and acquisitions, revenue recognition, complex equity instruments, stock-based compensation, and leases. In addition to advising private equity clients, Sachs has also advised public companies throughout his career.

Sachs earned a BS, Business Administration – Accounting, from the Sacramento State College of Business Administration. He is a licensed CPA and a member of ACG San Francisco.

### **Li Joins CohnReznick as Tax Partner**

CohnReznick LLP, one of the leading advisory, assurance, and tax firms in the United States, recently announced that **Angel Li** has joined the firm as a partner in its Tax practice. Li has more than 25 years of experience providing federal and state tax

compliance and consulting services to companies of all sizes across the

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Li earned a BS, Accounting, and MS, Accounting degrees from the University of Connecticut. She is a licensed CPA.

### **CLA Announces Advancements Across the Firm**

CLA (CliftonLarsonAllen LLP), the eighth largest accounting firm in the United States, recently announced that more than 800 CLA professionals were advanced to a new role. Twice a year, CLA advances high performing members of its team, further developing the leaders of the future. Other firm advancements take place in November.

CLA believes the best way to serve its clients and communities is to support its people in building careers that match their personal and professional aspirations. CLA offers its people the opportunity to make choices about their career path, including the industry they serve, the service capabilities they develop, their geography, and more.

Each year CLA makes compensation and advancement decisions through an inclusive and collaborative process. These decisions are made by coaches and leaders who take time to know and help our CLA family members live their inspired careers.

### **Valene Faulkner Joins Firm as Manager of Tax Advisory Services**

Schneider Downs & Co. a Top 60 independent Certified Public Accounting (CPA) firm providing accounting, tax, audit, and business advisory services to public and private companies, not-for-profit organizations and global companies. announced that Valene Faulkner, CPA, has joined the firm as Manager of Tax Advisory Services.

Ms. Faulkner has over 10 years of industry and public accounting experience in State and Local Tax, primarily focused on sales and use tax. Val has served clients in the retail, manufacturing and medical industries with extensive knowledge in the

electric utility, steel manufacturing and cannabis industries. Her areas of expertise

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