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Isaac M. O'Bannon • Feb. 19, 2024



Professionals on the Move is a round-up of recent promotions and staffing announcements from around the accounting and tax profession.

Schneider Downs Boosts Tax Team

Schneider Downs & Co., a Top 60 independent Certified Public Accounting (CPA) firm has expanded the leadership team in its Tax Advisory practice through the addition of several new hires.

Janelle Merlo, Tax Director, has 20 years of public accounting experience, providing

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University with a Bachelors in Accounting and Finance and received her Master's from Wake Forest University.

Hailey Adams, Tax Manager, has been in public accounting for over 9 years, primarily focusing on tax-exempt organizations. She has experience serving a wide variety of not-for-profit organizations including cultural organizations, business and professional associations, social welfare organizations and private foundations. Ms. Adams received her Bachelors and Masters in Accounting from Northern Illinois University.

Maxwell Kubas, Tax Manager, has approximately 5 years of experience in public and private accounting, and has provided tax and consulting services to a variety of companies, ranging from family-owned businesses to Fortune 100 organizations. Mr. Kubas received a Bachelors in Accounting and a Bachelors in Finance, as well as an M.B.A., from Robert Morris University.

Schell joins CohnReznick as Assurance Partner

CohnReznick LLP, one of the leading advisory, assurance, and tax firms in the United States, recently announced that Stacey Schell, CPA, has joined the firm as an assurance partner in its expanding Financial Sponsors & Financial Services practice. Based in New York, Schell has more than 25 years of experience providing technical services to a range of asset management clients including alternative investment funds under various investment trading strategies and complex capital structures.

Schell is well-versed in generally accepted accounting practices (GAAP) and generally accepted auditing standards (GAAS), advising C-suite and governing boards, along with other business stakeholders, on a range of compliance risks, accounting pronouncements, audit observations, and technology and process automation.

Before joining CohnReznick, Schell was a Partner for a Big 4 firm where she was the

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country and several major service lines.

Michael Antovski is a managing director and Chief Operating Officer of UHY Advisors. Based in Farmington Hills, MI, Antovski oversees the firm's national shared services, including finance, information technology, marketing, corporate compliance, and human resources. He has been active in all facets of the firm's acquisition initiatives and is instrumental in executing the strategic vision of the Board of Directors.

Andrew Borsuk is a managing director of UHY Consulting. Based in Atlanta, GA, Borsuk serves as the national sales leader and was formerly the leader of the firm's Blackline practice. He specializes in building a client base with expanding capabilities and solutions across enterprise and middle-market companies and targeted industries.

Charles Bruno is a managing director in the firm's Northeast region. Based on Long Island, NY, Bruno specializes in internal and Sarbanes-Oxley compliance audits with a background in corporate financial reporting. He works with private and public companies, providing internal controls review, creation, and implementation services.

Kevin Burns is a managing director in the firm's Great Lakes region. Based in Farmington Hills, MI, Burns performs audits of SEC registrants, advises on reporting requirements, and provides all levels of attestation services for small to mid-sized companies, including reviews, compilations, and agreed-upon procedures.

Nick Chambers is a managing director in the firm's Midwest region. Based in St. Louis, MO, Chambers leads the regional Private Equity Services Practice. His expertise includes all aspects of M&A and public filings, including due diligence,

carve-out and roll-up transactions, public registration statements and private debt

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Farmington Hills, MI, Percin has extensive experience conducting audits and reviews. He works closely with a variety of clients, including privately owned businesses, publicly traded corporations, and high-net-worth individuals.

Bart Reddy is a managing director in the firm's Great Lakes region. Based in Farmington Hills, Reddy leads the national Client Accounting and Advisory Services Practice and specializes in financial statement preparation, accounts receivable and accounts payable automation, advisory services, and technology solutions deployment.

Larry Stoklosa is a managing director in the firm's Great Lakes region. Based in Sterling Heights, MI, Stoklosa leads the National Aerospace and Defense Practice. He is a leader in the Audit and Assurance Practice and specializes in developing cost models, overhead cost evaluations, and transaction support.

Todd Sutherland is a managing director in the firm's National Tax Practice. Based in Houston, TX, Sutherland is the leader of the Research and Development Tax Credit Practice. He specializes in helping clients claim research and development tax credits and defending them under IRS examination.

Amber Sutter is a managing director in the firm's Great Lakes region. Based in Sterling Heights, MI, Sutter specializes in performing audits and preparing financial statements for a wide range of national clients in the middle market and has worked on SEC audit engagements.

Barry Thomas is a managing director in the firm's Mid-Atlantic region, based in McLean, VA. Thomas specializes in financial audits, reviews, and compilations in various industries, as well as preparation and agreed-upon-procedures engagements and extensive experience completing employee benefit plan audits for 401(k) plans.

He also prepares individual, corporate, fiduciary, and non-profit information

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financial services industry. As the Financial Services Practice Leader at Mazars in the US, he is responsible for driving organic growth and increasing brand recognition across the sector. Charles provides accounting, auditing and advisory services to a range of financial institutions, from investment advisors to hedge funds, public and private alternative investment vehicles, broker-dealers, banks, and specialty finance companies.

Lavine, Lofgren, Morris & Engelberg, LLP Names Brian Surratt as Managing Partner

The accounting firm of [Lavine, Lofgren, Morris & Engelberg, LLP](#) (LLME), San Diego's largest independent certified public accounting firm, announced the election of Brian Surratt as managing partner. Surratt, a leader in tax and accounting, assumed the leadership role on Jan. 1, 2024.

Surratt has more than 25 years of tax and accounting experience, primarily serving small businesses across Southern California in various industries such as construction, service, technology and start-ups, as well as professionals and high-net-worth individuals. He joined LLME in 2003 and dedicated 10 years to serving the firm's clients before venturing out to establish Aztec Accountancy Group, Inc., a small accounting firm focused on providing tax services. He returned to LLME in 2019 as a tax partner.

Surratt earned his bachelor's degree in economics from San Diego State University and holds a master's degree in accounting from the University of Florida.

Baker Newman Noyes Announces Two Senior Level Promotions in New Hampshire

Baker Newman Noyes (BNN), a nationally recognized top 100 accounting and advisory firm, recently announced two senior-level promotions in its New

Hampshire offices.

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Linda Sanborn, of Durham, New Hampshire, brings more than 20 years of experience to her role and specializes in providing tax services to individuals and closely held businesses, while also providing services in the firm's international tax practice. She joined Baker Newman Noyes in 2015. Sanborn earned a bachelor's degree and a master's degree in business administration from the University of New Hampshire.

Armanino Announces New Partner Class for 2024

Armanino LLP, one of the 20 largest accounting and business consulting firms in the U.S., recently announced that it welcomed 16 new partners in its 2024 class. The new partner class includes leaders who provide tax, consulting, trust and business management services. For the second consecutive year, half of the new class are women, reaffirming Armanino's commitment to Diversity and Equity in career opportunities at the highest level.

Armanino's 2024 New Partner Class:

Babette Campbell, Business Management, Los Angeles

Alex van Dillen, Consulting, Dallas

Clare Porreca, Tax, Philadelphia

Don Johnson, Tax, Irvine

Erin Barragar, Tax, Irvine

Florence Vo, Tax, Dallas

Jeff Laufman, Tax, Woodland Hills

Jessie Singh, Tax, West Los Angeles

Lisa Boyd, Tax, Irvine

Naz Bhangal, Tax, San Ramon

Payal Gupta, Tax, San Jose

Stephanie Shorkley, Tax, San Ramon

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