



News about you

East

Peter Abate, Boston Audit & Assurance, has been retired for 12 years.

Adebisi Adebowale, Rosslyn Consulting, gave her first TEDx Talk in Wilmington, DE for the 7th Annual Conference. She presented *Education for All*, how parents, teachers, and other adults of influence can help their children choose the path of education that best suits the life they want to build and create for themselves. It took her two months to craft and develop her talk which she delivered in seven minutes.

Gerard Agoglia, Stamford Audit & Assurance, is currently engaged as interim CFO for an emerging medical device company located in Duluth, MN.

Andrew Andreae, Rosslyn Consulting, is having a busy spring. He will graduate from Virginia Commonwealth University School of Medicine, start his residency in Internal Medicine this spring, and is due to be married.

Stephen Baranowski, Hartford Audit & Assurance, moved to Sedona, AZ with his wife, Noelle, in November 2018.

James Bender, Rosslyn Consulting, is now a professor at Concordia University teaching neuroscience, psychology, and statistics/analytics. He is involved in a program evaluation in the healthcare field, tracking and quantifying outcomes. He has leveraged his analytics skills as well as his experience as a healthcare provider (being a licensed psychologist).

Gail Boynton, McLean Services, since retiring June 2018, Gail has been working on a personal project which has been a vision of hers for over two years. It went live in February with the launch of her online free library. The Insight Awareness Metaphysical (I AM) Library contains public domain books in the metaphysics genre (Law of Attraction, mysticism, science of the mind, quantum physics). In her previous career (1973-1996) she was a radio broadcaster, so her next project is to record as many audio books as possible and add them to the library.

Lakshman Brahma, Summit Consulting, is Senior Configurator at Day & Zimmermann in Philadelphia.

Jerry Campbell, McLean Consulting, is currently working in advisory services.

Philip Carduck, New York Risk and Financial Advisory, has been retired in Virginia since 2011. His last position was with the Securities Investor Protection Corporation as Vice President of Operations and Finance from 1998 to 2011.

Patrick Casabona, Wilton Audit & Assurance, is a professor in the Department of Accountancy in the Tobin College of Business at Saint John's University. In a review that happens every five years for each tenured professor for their progress and contributions to the profession, during the Fall of 2018, the faculty in the Department of Accountancy and the Dean of the College of Business gave him the highest ranking as an excellent outstanding professor. The review is based on research in the area and articles published, paper presented at professional and academic conferences, service to the community and the teaching excellence in their area of concentration.

Brigid D'Souza, New York Tax, is an Assistant Professor at Saint Peter's University where she teaches in the Department of Accountancy and Business Law. She shares her experiences, the need for critical thinking, and flexibility of approach. She was in the quantitative modeling group within ITS, so she teaches her students modeling, formulas, and client readiness with respect to computational presentation and ease of use.

Bob Dickens, Philadelphia Audit & Assurance, was named the 2017-2018 Outstanding Member in Business & Industry by the North Carolina Association of Certified Public Accountants in July 2018.

Patrick Dougherty, Princeton Audit & Assurance, has been with The Siegfried Group since leaving Deloitte in 2010 and was promoted to Director in the Greater Washington DC metro area assisting the firm with Talent Delivery and Leadership Advisory services.

Robert Ennis, Jacksonville Audit & Assurance, is retired. He went inactive as a CPA in 2016 and remains healthy which was needed in 2018 to minister to his wife's medical issues.

Jim Fabiaschi, Hartford Audit & Assurance, was married on July 8, 2017 to Lisa Grisevich, now Lisa Fabiaschi. He has grandchildren Declan and Tyson, ages five and three.

Trey Gannon, Boston Risk and Financial Advisory, has relocated to Philadelphia.

Michael Goldbas, Hartford Tax, is teaching reading to kindergarteners and 1st graders at Bellizzi and Mayberry Elementary Schools in Hartford and East Hartford, CT (one day each week to help kids who are struggling with reading proficiency). He is lobbying for United Way - currently on the Advocacy Committee. He develops programs through United Way's Community Engagement Committee to advance the financial interests of the working poor (ALICE population - Asset Limited Income Constrained Employed) - currently on the Community Engagement Committee. He is also a Farmington Valley Arts Center Studio Artist and makes clay sculptures.

Ashley Goodall, Parsippany Services, is the co-author (with Marcus Buckingham) of this February's cover story in the *Harvard Business Review*, *The Feedback Fallacy*. The book from which the article was drawn, *NINE LIES ABOUT WORK* also by Ashley and Marcus, will be published by *Harvard Business Review Press* on April 2.

Leon Hassid, New York Services, has been running his own strategy consulting business, Hello Socrates, since early 2018. In this new role, he has been providing advice and support to large and small B2B organizations on sales, business development, and account management priorities and programs

William Houlihan, New York Audit & Assurance, is the Chief Financial Officer of the Thunder Bridge SPAC that focuses on financial technology business combinations. The firm completed a \$260 million IPO in June 2018 and announced in January 2019, a \$650 million cash and stock merger with REPAY - an electronic payments company. He is also an adjunct professor in the undergraduate business school at Montclair State University, NJ where he teaches a business strategy course.

Sandeep Jain, Orlando Consulting, is SAP FICO Consultant in Florida.

Paul Juras, Stamford Audit & Assurance, was named Chair-Elect for IMA's fiscal 2019-2020 period (July 1, 2019 to June 30, 2020) by the Nominating Committee of IMA® (Institute of Management Accountants).

Mark Kalen, Boston Audit & Assurance, is currently VP Product Marketing at SAI Global and recently launched SAI360 for Financial Services, a curated suite of software and services. His oldest son, Nicholas, is completing his first year at Northeastern D'Amore-McKim School of Management while his son, Ryan, will be a sophomore, and daughter Celia is in fifth grade in Hopkinton, MA.

Praveen Kamarsu, New York Risk and Financial Advisory, currently is president of an insurance company called INF Health Care. They provide travel/visitors insurance for those going to/from the US.

Peter Kennedy, Boston Consulting, is managing principal of Futures Strategy Group (FSG). Based in Connecticut, FSG is a boutique consultancy specializing in scenario planning and alternative futures analysis.

Kameron Knab, Rosslyn Consulting, recently traveled to Spain with **Parker Baum, Chicago Consulting**, and **Fitz Lufkin, McLean Consulting**. They capped off a weeklong trip through the country in a Deloitte-clad cycle tour around Barcelona. The three of them started as BAs in Federal S&O and have been friends ever since. Fitz is a Senior Consultant in M&A, Parker now works at Walmart Labs, and Kameron is finishing his MHA at Johns Hopkins Bloomberg School of Public Health, after which he will return to the Austin office aligned to GPS.

Ron Kranzler, New York Audit & Assurance, is the managing partner of HKMP, a 25-employee CPA firm located in midtown New York City. They have their own Proprietary Software called "Amelio" which they license to several other CPA firms.

Elliott Kugel, New York Consulting, was recognized as a top financial advisor in 2018 by the industry's three leading trade publications: Forbes, Barron's and The Financial Times. He was named to the *Forbes America's Top 250 Wealth Advisors in 2018* for the 3rd consecutive year, *Barron's Top 1,200 Financial Advisors in 2018* for the 9th consecutive year, *The*

Financial Times Top 400 Financial Advisors in 2014, 2015, & 2018, Forbes Best-in-State Wealth Advisors list in 2018 and 2019. Elliott works in the Bridgewater, NJ office of Merrill Lynch and lives in Skillman, NJ.

Nik Kumar, New York Consulting, expanded his Data Analytics business internationally. He also published an article – *What do Sasha, Katya, Vlad and Olga spend their hard-earned money on?* He used data science to uncover insights about the spending patterns of millennials in Eastern Europe.

Eugene Lukac, Miami Consulting, retired in 2017 after ten years at Deloitte. He has gone back to one of his youthful passions: equestrian sports. He is training a young and very talented horse for show-jumping competition. He is also volunteering at the Naples Therapeutic Riding Center, keeping the horses fit and limber for their work with children and adults with disabilities.

Tom Mangelsdorf, Orlando Consulting, has been selected to be a Solar System Ambassador. The Solar System Ambassadors (SSA) program is run by JPL/NASA. It consists of motivated volunteers across the nation that share the latest science and discoveries of NASA's missions through a variety of events designed to inspire their communities.

Louis Marcoccio, Boston Consulting, is an innovator, business optimizer and expander, author, advisor, motivator, and award-winning presenter. He has been a start-up entrepreneur, transformer of global businesses and IT, transformer of products and product engineering, inventor, global business and IT executive, worldwide technology advisor, award winning Gartner Analyst, university student mentor, and a digital and blockchain strategist.

William Marsh, Rosslyn Consulting, joined the Department of State as a Foreign Service Officer and will be moving to São Paulo, Brazil for two years to work in the U.S. Consulate. He is currently learning Portuguese for the next six months at the Foreign Service Institute before he and his wife move to Brazil in late summer. They found out their first assignment during a ceremony called "Flag Day" where they announce each city followed by the officer's name who is going there which was quite suspenseful!

Douglas Martin, New York Consulting, met his wife, Yolana (who is still with the firm in DC Human Capital) in 2016 while they both worked at Deloitte Consulting. They were married on May 29, 2018 on a vineyard in Franschoek, South Africa, joined by family and friends from all over the world including a few from Deloitte.

Chris McGovern, New York Consulting, recently launched McGovern Project, a Manhattan-based residential and commercial interior design and renovation services firm. While at Deloitte, Chris focused primarily on operational improvement and post-merger integration projects with the firm's financial services clients. After earning his MBA at NYU Stern ('11), he transitioned to industry, as M&A investment banker at UBS and most recently as an Executive Director at Moelis & Co., an M&A advisory firm. The decision to launch McGovern Project, followed a lifelong interest in architecture and design and a strong belief there was market demand for a streamlined, process-driven approach to interior design and

renovations projects. Since launching in 2018, he has completed projects in New York, LA, and Chicago.

Robert Misey, Nashville Tax, recently published the eleventh edition of his book *A Practical Guide to U.S. Taxation of International Transactions*.

Tracy Ng, Charlotte Audit & Assurance, recently completed her MBA at Wake Forest University and was promoted to Corporate Controller at her company effective Feb 4, 2019.

Nimo Omar, Rosslyn Consulting, joined Google Cloud as a Sales Engineer last October. She also became engaged just before Christmas.

Joseph Park, Rosslyn Consulting, recently co-founded a law firm, Park Matossian LLP, specializing in estate planning and family law in the greater Los Angeles area. He serves as a co-managing partner of the firm and primarily focuses on the estate planning practice. He also founded Modus Vivendi Consulting LLC in 2018 that provides client services including life coaching, financial consulting and education, and career counseling.

James Pates, New York Risk and Financial Advisory, is in his first year at Columbia Business School where he joins the class of 2020. He is thrilled to be back in the classroom and doing his best to remember accounting formulas.

Laura Peebles, Washington Tax, retired from Washington National Tax in 2014 and is now an Associate Editor of the Society for American Baseball Research.

Marina Portnoy, Washington Consulting, joined the University of Miami as a Business School faculty member.

Brooke Pottish, New York Consulting, continues working in residential real estate as a mother-daughter duo helping clients buy, sell, and rent all types of properties throughout New York City.

Jeff Rennert, Nashville Audit & Assurance, has been promoted to the role of VP, Financial Reporting for Lucent Health Solutions LLC. He is overseeing a team of six staff and growing.. He has also had some career advances in his Army National Guard career, being assigned to a financial manager role with them and is currently under review to obtain the rank of Captain.

Chauhan Sameer, New York Consulting, became the Director (CEO) of the International Computing Centre organization in August 2018, three years after joining the organization. He moved from New York to Geneva and runs this shared services ICT organization for the UN system.

John Schrier, New York Tax, following SS&C Technologies, Inc.'s acquisition of the North American operations of CACEIS, he is now working for SS&C GlobeOp in the role of Director, Business Development.

Austin Shaw, McLean Consulting, is excited to announce his engagement to Stanley Stilwell, a current Deloitte Consultant in Customer & Marketing. Austin and Stanley met three years ago at a Deloitte-sponsored conference at Disney World, the Out & Equal Workplace Summit. Austin is currently a student at Columbia Business School. Stanley has been at Deloitte for over three years and specializes in Digital Customer Strategy within the financial services industry. They will be married over Labor Day weekend this year at the New York Botanical Garden.

Randy Siller, Stamford Tax, was appointed Chairman of the NYSSCPA Estate Planning Committee. He was elected to the Board of Directors of Community Health Care Network (CHN), a not-for-profit organization providing more than 85,000 New Yorkers with primary and behavioral healthcare, nutrition, wellness, and needed support services.

Patrick Sim, Philadelphia Consulting, retired again from industry in June 2018 and is looking forward to the next chapter in life and career.

Scott Singer, New York Consulting, was elected as the 35th Mayor of Boca Raton, FL in August 2018. His current term runs through March 2020. Scott is the founder of Singer Law Office, P.A., a firm focused on entrepreneurs and has expanded his practice to include serving as a commercial mediator. He recently earned certification as a circuit court mediator from the Florida Supreme Court

Richard Sleutaris, Philadelphia Audit & Assurance, is working as a consultant at his company, Richard J Sleutaris.

Zara Stasi, New York Services, left the Deloitte Greenhouse National Team where she developed her role of Greenhouse Artist to start her own creative business. She is the Founder and CEO of Good for the Bees, a creative studio in NYC where she specializes in murals, live-capture, illustration, and art. She is looking forward to taking what she learned at the Deloitte Greenhouse where she led the Live-Capture (i.e., graphic facilitation) offering, and bring it to many clients.

Chantee Steele, Philadelphia Risk and Financial Advisory, is back in school, earning an MBA in Strategic Management and Entrepreneurship & Innovation from The Wharton School.

Jeffrey Teitel, New York Risk and Financial Advisory, is the founder of the RISE of Peace Inc. ("RISE"), a non-profit which began in 2012. RISE helps provide free educational support to secondary schools including professional development, direct instruction, curriculum design, writing competitions, and consultations, relevant to addressing and countering the prospect of school violence.

Steven Waxler, Princeton Audit & Assurance, has been working at Independence Blue Cross, based in Philadelphia for the past four years and was recently promoted to Manager of Regulatory Audit.

Philip Weintraub, Wilton Audit & Assurance, has been looking for ideas and inspiration to promote innovation in health systems with Professor Martin McKee, Professor of European Public Health at the London School of Hygiene and Tropical Medicine. Their new paper,

Leadership for Innovation in Healthcare: An Exploration has been published by the *International Journal of Health Policy and Management*.

Bryan Wilson, Rosslyn Consulting, left Deloitte in January to move to Richmond, VA and join CapTech Ventures as a Project Manager. He moved to Richmond with his fiancé, Chelsea, as she pursues Physician Assistant school. Bryan and Chelsea are also planning for and getting married on June 1, 2019 near Dewey/Rehoboth Beach in Delaware.

Mike Wood, Memphis Audit & Assurance, was named CFO of the Year by the Environmental Financial Consulting Group, New York in 2018.

Tracy (Nimmo) Zaweski, New York Audit & Assurance, has been a franchise owner for Home Instead Senior Care, in Hampton Bays, NY since August 2009. She is married to husband John and has twin daughters, Drew and Laura.

Central

Ervin Ackman, Houston Consulting, is currently an equity partner in an organization providing an updated Reagan administration system that establishes competitive advantage through management and control of the global technology space. The Program Director under Reagan remains as president of the organization and Ackman's partner.

Beth Adams, Cleveland Tax, was appointed Chief Tax Officer for KeyCorp & Subsidiaries. KeyCorp, the Bank Holding Company of KeyBank, is one of the nation's 20 largest banks and is a leading financial services provider offering a broad array of retail, commercial, and investment banking products and services for over 3 million clients across the United States. She is on the Advisory Board of the Bank and Capital Markets Tax Institute and is a member of the Tax Executive Institute.

Alon Altman, Chicago Consulting, has been living back in his home county, Israel, since 2011. He practices law, involved in various real-estate projects and work with the Jerusalem Post.

Jeffrey Bone, St. Louis Risk and Financial Advisory, recently joined Northwestern Mutual as a financial advisor at Greater St. Louis area. He and his wife, Meghan, have a 2-year old daughter, Catherine, and are expecting her little sister in May. They live in West County.

Lynn Boyd, Grand Rapids Audit & Assurance, was appointed Associate Dean for Undergraduate Programs at the University of Louisville College of Business effective July 1st, 2018.

Chad Callander, Detroit Consulting, joined Ford Motor Company after leaving Deloitte and has had a series of roles in finance and marketing. His current position is Truck Marketing Manager and is currently launching the All-New 2019 Ford Ranger.

Harry Demaio, Cincinnati Risk and Financial Advisory, retired in 2002 and has been keeping busy as a published author of tongue-in-cheek mystery novels featuring an alternate

universe where homo sapiens have disappeared and anthropomorphic animals reign supreme. The series is called *The Casebooks of Octavius Bear – Alternative Universe Mysteries for Adult Animal Lovers*. Published by *MX Publications* in London, there are ten volumes so far and he is working on number eleven.

Jennifer Doll, Kansas City Audit & Assurance, moved to Portland, OR in 2018 to join Oregon Health and Science University (OHSU) as Vice President of Hospital Finance. Prior to her move to the Pacific Northwest, she worked in various roles at the University of Missouri, with her last position being the Executive Director of Finance for the Health System.

Vic Gallese, Dallas Consulting, got a chance to do independent consulting outside the US. Most of his time was getting to and from the client, analyzing progress and giving updates. This year he has spent more time observing the client's business, understanding the client's and the country's culture. He was able to stay over more weekends and extend short weeks to look at the business through the client's eyes and into their issues, not just what his pre-conceptions and mostly his US experiences had provided him. While he has been working outside the US off and on for over 20 years, he says he finds the US now has many more similarities than differences with other countries and the whole experience has been eye-opening to him.

Brian Gunia, Chicago Consulting, currently an associate professor at Johns Hopkins University, has published a negotiation book called *The Bartering Mindset: A Mostly Forgotten Framework for Mastering your Next Negotiation*.

Linda Guteres, Huntington Tax, after developing a solid base in tax preparation and then earning a BA in Business Management, she has since moved into her current position of Principal Account Clerk of Longwood Public Library (LPL) in Middle Island. LPL is currently running with a \$7.5 million budget, employing over 120 employees, and serving a community of over 60K residents. She is a mom of four great young men with her husband, Robert.

Kathleen Habig Nippert, Cincinnati Consulting, began her own consulting firm, Workforce Strategic Advisors in 2013, in addition to enrolling in a doctoral program in Health Administration at Medical University of South Carolina (Charleston). She has been certified as a Fellow in the American College of Healthcare Executives (ACHE) for over 12 years. After receiving her doctorate in May 2018, she was immediately engaged in a consulting project which focused on improvement of Patient Experience across a medium sized health system. She has been married over 10 years and lives between Cincinnati, OH and Nashville, TN. She is also a Trustee for The Beechwood Home in Cincinnati and is active on the Mercy College Advisory Program (Toledo, OH) for the Master of Nursing Administration and Master of Health Administration Programs. She will be adding Adjunct Faculty to her CV in the Fall Semester teaching MHA students "Healthcare Operation Management". She also serves on the Vestry of her church and on the Volunteer Circle for the University of Cincinnati Women's Club.

Steve Halterman, Houston Consulting, is a Clinical Program Manager for JBS USA, in Greeley, CO where he developed and manages JBS STRONG, the company's evidence-based Worksite Health and Connectivity program.

Jason Harms, Denver Consulting, took on a role with a mid-size ITSM provider to develop and manage business process within the organization. The headquarters is in Colorado Springs where he is originally from and where he still has family. He and wife, Kelly, are now close to the mountains and hiking which they love.

Anzar Hasan, Dallas Risk and Financial Advisory, was awarded senior member level status from IEEE (Institute of Electrical and Electronics Engineers) and was also invited to present in a future IEEE event. He is a published author of *Cyber Security - Protect your Personal Information*.

Charlie Judy, Chicago Services, left Deloitte in 2005, to hone his HR skills with other organizations in the professional services space. In 2015, after three years as the Chief HR Officer for Baker Tilly, he "pulled the ripcord on corporate America" to finally scratch his entrepreneurial itch. He built a cloud-based workplace culture survey, assessment and analytics platform, WorkXO. After building the business from scratch, he sold it to QuestionPro in 2018, where he's now the President of the Workforce product line which includes an integrated set of survey-based-analytics solutions for culture, engagement, and employee experience.

Emeka Kanu, Chicago Consulting, is currently working as a Strategy & Operations Lead at Google and has moved back to New York, NY.

Kathryn Kienholz, Minneapolis Tax, appeared on Jeopardy on December 27, 2018. She was the champion that day, winning \$22,000, and qualifying to compete again the next day. 84,000 people take the online initial screening test. Only about 400 make it far enough through the rest of the screening process and appear on the show every year. The oldest winner on Jeopardy was 72; Kathryn is 69. Her proudest moment, besides actually winning, was when she got the Bitcoin question right ahead of her two millennial opponents.

Thomas Kramer, Minneapolis Audit & Assurance, completed his 35th year at Xcel Energy (parent Company for Northern States Power). He served various roles in External Reporting and Securities Issuance (5 years), Business Unit Reporting (3 years), Gas Utility Finance (8 years) followed by Nuclear Operation Finance (8 years) and is currently living life as a member in the Revenue Requirements Group. He finds the prospect of possibly walking away from the workforce and being a full-time grandpa at the end of 2019 more appealing every day.

Douglas Laney, Chicago Consulting, will be teaching the course *Business Analytics: Data and the Firm* beginning in April at University of Illinois. Additionally, through its iMSA program beginning in May, he will be teaching a course on *Infonomics* based on his new book of the same title. The course will explore the economic characteristics of information, and how to monetize, manage and measure information as an actual corporate asset.

John McNicholas, Chicago Services, continues his work in retained executive search and board director recruiting. He is also a certified official in three sports: football, lacrosse and ice hockey.

Tom Mitchell, Dallas Risk and Financial Advisory, published an article in March *PenTest* magazine titled, *Does your SOC Soar?*

Praptika Raina, Chicago Risk and Financial Advisory, recently started at U.S. Soccer as the CFO and was excited to hear that Deloitte is a sponsor of SheBelieves.

Katherine Rick, Minneapolis Audit & Assurance, featured in the *Journal of Accountancy*, *CPA Insider*, in the article, *CPA athletes balance work, family, fitness*. She has competed in roughly 50 logrolling and boom-running events and is ranked as one of the top professional female competitors in the world. She has earned 13 top-three finishes since turning pro in 2004, according to her website, and is ranked second in the world in boom running.

Lindsey Schiesser, Indianapolis Tax, went back to the classroom - this time to teach! She is currently in her third semester as an Associate Professor at Indiana University - Indianapolis Kelley School of Business and is teaching *Introduction to Federal Income Tax* at both the undergraduate and graduate level. She also has a tax practice, Schiesser Tax Solutions, serving individuals at small businesses.

Anette Sparks, Tulsa Audit & Assurance, recently changed position from Controller to Chief Accounting Officer at the Bechtel Group of Companies. She moved from San Francisco to Virginia in 2018 when Bechtel closed its San Francisco office and moved the Corporate Finance function to Reston, VA.

Dan Stathos, Dallas Risk and Financial Advisory, retired and is now performing consulting services to the utility regulators in the US Virgin Islands and Guam and quality assurance for universal service fund audits.

Rebecca Teague, Dallas Audit & Assurance, retired January 1, 2010 after 49 years of working primarily in public accounting.

David Trzupsek, Denver Consulting, is an Executive Director at TTEC.

Hyden Yoo, Chicago Consulting, born in Seoul and raised in Houston, Hyden graduated from the University of Chicago with a degree in Biology with the intent on becoming a doctor. Instead, he dipped his toes in a variety of jobs including fitness training, retail sales, and management consulting at Deloitte in Chicago. Unhappy with his life trajectory, Hyden took a chance (a crazy one) and applied to a reality show called Fear Factor and won. He took his winnings, moved to New York and pursued his passion in designing clothes. Hyden has been the creative head of his label since 2008. He has also since started the easily accessible streetwear brand Standard Issue. Hyden currently lives in Venice, CA and designs out of his studio in downtown Los Angeles. Hyden is a lover of the many multicultural cuisines, art, and people LA has to offer. Hyden Yoo contributes a percentage of all sales to the many local and global foundations that support humans and make the world a better place.

West

Nishant Aggarwal, San Francisco Risk and Financial Advisory, founded a travel technology startup company called BlueWander based out of Mountain View, CA is an end-to-end experience platform for luxury tailor-made travel, like a full-service modern luxury travel concierge powered by tastefully-vetted local expertise.

Todd Bloom, Seattle Tax, recently accepted a Private Client Services role in Seattle.

Jonathan Bogner, Los Angeles Tax, is an entrepreneur, investor, disruptor, and problem solver. Recently, he was CFO of Brandable Inc., a venture capital backed consumer goods company. He graduated from UCLA with a degree in Economics and started his career in public accounting for Deloitte while attending Whittier Law School at night. Early in his career, he was an executive at Empire Pictures, ESPN, and Weintraub Entertainment. Later, he was an Executive Producer at FremantleMedia, Relativity Real, All3media, and T-group; and was President at TAG Entertainment, EVP at Phonics Game, EVP Sales & Marketing at Stayhealthy, and EVP New Business at AFFA. Jonathan started Level 2 Partners to work with start-ups to take them to the next level.

Monica Emerson, Los Angeles Audit & Assurance, is delighted to announce that her eldest son and her daughter-in-law gave birth to her first grandchild on January 26, weighing 7.7 pounds and 20 inches. His name is Shai Boaz Hanohov.

Nancy Gribbell, San Francisco Tax, retired on November 1, 2017 and moved to Prescott, AZ.

Nathan Lebaron, Las Vegas Audit & Assurance, worked in the private sector as an in-house accountant at a regional Heavy Civil Construction company after leaving Deloitte. In January, he entered a partnership in a small tax and consulting firm and enjoys serving clients in construction, food services, and other miscellaneous clients. He enjoys the clients and looks forward to the income mobility a client facing practice will provide. The analytical skills he learned at Deloitte serve him on a daily basis.

Christine Legrand, San Francisco Tax, is currently at Merrill Lynch Wealth Management as a wealth manager.

Alex Leung, San Francisco Consulting, is a co-founder of OneDegree, an insurance technology startup and candidate for a digital insurance license in Hong Kong. They have recently announced their strategic partnership and product launch with Cigna.

Jaleh Parsa, Orange County Consulting, started her own business doing ERP implementation and it has kept her fully engaged with various projects.

Matt Pixa, Los Angeles Services, and his firm, My Portfolio Guide, LLC, were recognized as a Five Star Wealth Manager for the 9th year in a row. This award was mentioned in *Orange Coast Magazine* and *The Wall Street Journal*. He is an independent Registered Investment Advisor.

Lora Poepping, San Francisco Services, relocated to the Seattle area in 1994 and, after 13 years with Microsoft, launched Plum Coaching & Consulting, providing HR services for small

business as well as career and job search coaching. Lora grew the firm from one to 14 over the past few years.

Dennis Tsao, San Jose Consulting, joined Myovant Sciences, a Biopharma startup in the Bay Area, as Associate Director of IT Infrastructure & Security. His areas of expertise are in data center and Google Cloud.

Patrick Wolfe, Portland Audit & Assurance, retired on June 30, 2018 as the director of finance for Cricket Debt Counseling, a not-for-profit organization providing financial literacy training to individuals who are about to enter bankruptcy. In active retirement, he continues to serve on the advisory board for the Oregon State University Business Round Table.

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