

News about you



Central

Sara Arvold, Grand Rapids Tax, relocated from Cincinnati, OH to the Minneapolis, MN area in December 2014. She is a state and local tax manager for Crowe Horwath, LLP and is looking forward to reconnecting with her Deloitte colleagues in the Minneapolis area. Sara and her husband, Franz, along with their three children—Evan, Connor and Lauren—reside in Eden Prairie.

Alan Bailey, Tulsa Consulting, will publish the third and final book titled Dolores from the series 'The Alexander Saga' on November 1, 2015.

Craig Brabec, Detroit Consulting, has been promoted to the newly created position of Chief Analytics Officer (CAO) at Caterpillar. This position will provide leadership for the data analytics strategy and execution across the enterprise, global innovation labs, related venture capital investments and strategic partnerships to advance analytics. As CAO, Craig will be responsible for coordinating enterprise-wide analytics efforts to provide data driven solutions for challenges in all areas of the company. His past experience with program leadership, operational improvement, transformation, and supply chain management will serve him well in his new role.

Rhett Buck, Houston Tax, presented the following seminars on tax topics: Charitable Contributions of Volunteers' Unreimbursed Expenses to Animal Welfare/Rescue Organizations and Bankruptcy Tax Issues: Federal Income Taxes.

Robert Cruikshank, Houston AERS, continues his involvement with the American Heart Association and was recently appointed to the Texas Heart Institute Foundation. This institute was the first to implant an artificial heart and their research has continued to improve the artificial heart in size and effectiveness. Robert thanks the firm for its support as he carried out work in the accounting world and was also able to devote time to organizations dedicated to improving the health of countless others. He hopes his experience will serve as an incentive for those in and just entering the firm.

He further adds, “When I graduated from Rice University I received some of the finest advice a young man could receive. My father-in-law, a successful businessman, told me never to forget as I work to further my professional career that I should always belong to a charitable organization that I felt was necessary to improve the lives of our fellow man. I chose the Heart Association and was fortunate, with the support of our firm, to become chairman of the boards of the Houston, TX, and then the American Heart Association.”

Bonita Dupre, Detroit Tax, finally retired from a ‘9 to 5’ job. She maintains a small client base of tax clients—enough to keep her up to speed on the latest tax law changes! She was elected to the board of directors of the St. Vincent de Paul TriParish Community Pharmacy in Houma, LA in July 2014 and was appointed as treasurer at the same time. This volunteer position is a perfect fit and has allowed Bonita to meet some very wonderful people whose primary goal is to help those in need. The TriParish organization is a pharmacy of ‘last resort’ and all medicines are dispensed free of charge.

Judy Griffith, Ann Arbor Tax, has received the designation of CGMA, Certified Global Management Accountant. She is the controller for HIMS Consulting Group, Inc. located in Steamboat Springs, CO. The company provides temporary IT health services nationally.

Brian Gunia, Dallas AERS, is now an assistant professor of organizational behavior at Johns Hopkins University (<http://carey.jhu.edu/faculty-research/directory/brian-gunia-phd>). He also speaks and consults widely on a variety of topics related to negotiation and high-performance teams. Brian is married with a two-year old daughter and another daughter on the way and currently lives in the Baltimore area.

Jami Hartley, Dallas AERS, got married on September 5, 2014 to Dillon Civitarese at the Dallas Arboretum and Botanical Gardens.

JB Henriksen, Salt Lake City AERS, recently bought into the partnership of Advanced CFO Solutions (www.advancedcfo.com). Advanced CFO Solutions is an outsourced CFO and Controller firm serving small to medium sized clients who are growing rapidly. The consultants of the company serve as part-time CFO and controllers, providing all of the same work as a full-time person at a fraction of the cost. The company is located in Salt Lake City, UT and serves clients all over the country with an emphasis on the Rocky Mountain region.

Zubair Khan, Houston AERS, has joined Baxter Healthcare in the global audit team as team lead. He received the certification for Certified Information Privacy Manager in November 2014.

Paul Lacroix, Columbus AERS, has been appointed to the Board of Directors of the Bexley Community Foundation in Columbus, OH. In addition, he serves on the audit committee of Capital University. He and his wife Melissa will be spending most of the winter at their residence in Naples, FL.

Ken Loewen, Austin Services, recently joined Advisicon, Inc., an international consulting, application development, and training services firm based in Vancouver, WA as the Director of Professional Services. Additionally, he was recently recognized as a Microsoft Certified Professional in Project and Portfolio Management. Ken and his family are in the process of relocating from Austin, TX to Vancouver, WA.

Isis Martinez, Austin Consulting, is now principal consultant of E2W Workplace Solutions. Her work positions her as the primary Human Capital Advisor to CEOs and executive directors of small and mid-size organizations in the Austin area, including the nonprofit sector.

She is also director of operations for Virtuin, a niche marketing research firm in the Austin area for all OD, Change Management, and Project Management needs. Virtuin serves the private and public sectors. More information can be found at www.virtuinstrategy.com.

Eric Mellum, Minneapolis Consulting, married Jennifer Smith in August 2014. Eric continues to provide strategic information management services for the Twin City clients. He can also be seen on stage as a tenor with The Minnesota Opera, where he is enjoying his seventeenth season.

Jana Mims, Houston Services, completed dual Juris Doctor/Master of Business Administration degrees from Thurgood Marshall School of Law (TMSL)-Jesse H. Jones School of Business at Texas Southern University (TSU) on December 13, 2014. She has consistently been on the TMSL Dean's List and will graduate Magna Cum Laude from the business school. During the three and half year academic trek, Jana left a lasting imprint on the school and community.

Jana was the recipient of the Texas Young Lawyers Association Diversity Scholarship, which is awarded to one student at each Texas law school annually. She won first place in the Heman Marion Sweatt Client Counseling Competition and advanced to the American Bar Association Regionals. To support the student body, Jana founded and served as President of PALS—Parents Attending Law School. Jana was a law clerk for the United States Attorney's Office, Southern District of Texas, in the Financial Litigation/Asset Forfeiture Unit. Upon graduation, she seeks to obtain a position providing client service across business and legal sectors.

Reginaldo Montague, Chicago Consulting, is now director of projects at NorthFind Partners and has been named one of Chicago Defender's Men of Excellence. He has over 20 years of management, consulting and engineering experience. His industry experience includes consumer products, petro-chemicals, waste treatment, pharmaceuticals, public sector, healthcare, auto manufacturing, telecommunications, and high technology. He has held global positions in North America and Europe.

Alejandra Solano, Chicago Consulting, is now director of strategy at Genera. He reports to the executive, responsible for the strategic planning process for the group and their companies, the management and monitoring of their investment portfolio, the custody and continuous improvement of their operating model. He embraces the learning from 12 years of service with Deloitte and looks forward to serving as an extended network for practitioners and alumni alike. He adds, "My heart stays 'green' with gratitude."

Jerry Stephens, Austin Consulting, has been living in Georgetown since 1986 where he has started a commercial real estate practice and an internet service company with over 25 towers covering a 1,900 square mile area in the Austin Metroplex. They are extending fiber and wireless services through suburban and rural communities similar to what Google Fiber is doing within the city.

William Strange, Houston AERS, has been elected by Habitat for Humanity, Northwest Harris County (Habitat NWHC) to its board of directors and named him its treasurer.

Roger Towle, Pittsburgh AERS, was named 2014 CFO of the Year in the Large Nonprofit Category by the Pittsburgh Business Times. Roger has been the VP for Financial Affairs at Grove City College, in Grove City, PA since 1995. He also currently serves on a number of nonprofit boards including the Pulmonary Hypertension Association (chair-elect), the Grove City Medical Center (treasurer) and George Junior Republic.

Gary Webb, Rochester AERS, formed a live music entertainment entity selling show bands all over the world. Nik Entertainment Company, featuring acts such as Nik and the Nice Guys and Shama Lama, have performed approximately 90 shows for NFL customer-related Super Bowl parties, as well as events for CNN, U.S. Armed Forces Japan, Time Warner, Canadian Embassy, various Olympics, Caribbean/Cayman Islands resorts, Grey Cup (Calgary, Montreal), Reebok in New England and Germany. Nik Entertainment recently opened an office in Toronto to support the music and theatre efforts in one of the world's top international destinations.

Nayoung Won, Detroit Services, is pursuing a Master's degree in Higher Education Administration at the University of Pennsylvania. As a graduate student, she is engaged in topics such as ways to increase access to college, the role of public policy in financing higher education, and leadership issues of academic leaders. She also works at the Wharton School as a Graduate Assistant in the Undergraduate Division, mentoring student leaders and developing programs such as career exploration trips. Nayoung is also working part-time as an admissions reader for Yale-NUS, a new liberal arts college developed in partnership with Yale and the National University of Singapore. Upon completion of her program in May 2015, Nayoung hopes to work with undergraduate business students in roles such as academic advising, leadership development, and admissions.

Marvin Wright, Louisville FAS, retired on January 1, 2014 from Kemper CPA Group in Evansville. He is now a partner in Donaldson Capital Management in Evansville as a senior portfolio manager and financial planner.

David Yeung, Chicago Consulting, has joined ETR Associates, a California-based health and education nonprofit, as its manager of strategy and business development. He will work with the CEO and leadership teams to lead corporate strategy, build new revenue models, and implement operational improvements to grow their impact.

East

Martin Abo, Jericho Tax, is now a co-managing member of Abo Cipolla Financial Forensics, LLC. This merged services division is an affiliate of individual core accounting firms, Abo and Company LLC and Cipolla & Company, exclusively providing expert witness testimony on financial matters, and other litigation support services as well as business valuations.

The Philadelphia publisher, *SmartCEO*, recently selected Marty as 'Accountant of the Year' for its prestigious Power Player Awards along with several highly respected professionals determined to be the impact players that CEOs could count on to help grow their business. He also became a director and treasurer of Exit Planning Exchange-Philadelphia (XPX), whose members include estate planning attorneys, CPAs, investment bankers, wealth advisors, commercial lenders, executive coaches, M&A attorneys, marketing and management consultants as well as former business owners who now advise fellow business owners on exit planning.

Aman Advani, Atlanta Consulting, was named 'Forbes 30 Under 30' 2015 in Retail & Ecommerce. His company, Ministry of Supply, founded out of MIT, launched on Kickstarter in 2012 and has gone on to have some of the most successful fashion campaigns in the platform's history. The men's fashion company has developed dress shirts that use NASA-developed technology to manage heat and moisture. Aman serves as president of the company. [Click here](#) to read more.

Meredith Amdur, New York Consulting, left DirecTV to become CEO of Wanted Analytics.

Will Amos, McLean AERS, has recently launched a startup called Veterans List (<http://veteranslist.us>). This website allows anyone to search for a veteran-owned business for free, and any veteran-owned business can post its business for free. It is run by Will, a U.S. Marine Combat Veteran, and another U.S. Army Ranger Veteran. They currently have about 130,000 businesses in their listing and are growing every day.

Raymond Bantum, Baltimore AERS, is embarking on an initiative and looking for Deloitte professionals and alumni to assist him in this endeavor. Background: "United States Federal Government agencies give out billions of dollars in grants to domestic and foreign organizations. There are very strict auditing, and reporting requirement that are mandated by the Federal Government when organizations accept these funds and no organizations are exempted from these auditing and reporting requirements."

The Problem: "A good number of organizations receiving Federal Grants are not accounting for the grant money in the way that the Federal Government mandates. That is generally due to the grantees having inadequate training on Federal Grant Audit and Accounting Requirements, and the fact that the Grantees may not have the adequate accounting software in place to be compliant with the reporting requirements."

His Solution: Raymond Bantum of Bantum Consulting services has created a Federal Government Grants Management Training program that is unique in that the training program revolves around a Federal Government A133, A110, and A133 compliant off the shelf financial accounting system that has all of the features and capabilities outlined in those OMB Circulars. Up to now most training relative to federal grants management only address what the grantees have to do to be compliant. His training shows how they can be compliant as the training is on an actual live accounting system that as all of the features and capabilities required by the Federal Government. The model also incorporates the new "Super Circular" requirements so that it will be able to be used in the upcoming years when the Super Circular takes effect. You can contact him for more information: rbantum@gmail.com

David Brooks, London AERS, recently relocated to Nashville, TN as the commercial real estate manager for BB&T. His team provides financing and other banking services for real estate acquisition and development in the state of Tennessee.

Christopher Cacace, New York AERS, became the partner-in-charge of the Theater, Media and Entertainment Group of Marks Paneth on January 1, 2014 and heads the firm's accounting, tax and advisory practice devoted to theater and film production companies. Christopher still works with several Deloitte alumni who have been his partners for years.

Kassim Chaudry, Jersey City Consulting, has been working at EMC since 2005 first as a project manager in the professional services division and most currently as a pre-sales systems engineer.

Lisa Colletti, Jericho Tax, along with Mike Weissman, recently hosted members of the Deloitte community at the Barclays Center for an evening of Nets basketball and conversation amongst old friends. Lisa and Mike are currently principals at Aspiriant, the national independent wealth management firm which acquired Deloitte's investment advisory practice in 2010. Aspiriant is engineered to serve affluent clients and their families for generations. With seven offices from coast to coast, the firm serves approximately 1000 families and manages over \$8 billion in assets.

Attendees at the event included Larry Montague, Brian McMahon, Jacque Romano and Steve Christie from the Stamford office and several other members of the Deloitte Northeast community, many of whom are current clients of Aspiriant. The spirit of 'Colleagues for Life' was certainly shared and a good time was had by all.

Thomas Doorley, Hermitage Consulting, sees increasing interest from clients asking for assistance on involving their Boards in the strategy dialogue. Each year, as in Deloitte's most recent governance survey, strategy comes out as the most important issue. Yet, too many Boards do not understand how to leverage the talent and experience that should be resident in their Directors for informed input. He adds, "As alumni of Deloitte we have a lot to offer. It is clear that management and their Boards need the assistance."

David Dresner, New York Consulting, decided to make teaching a professional commitment and became a licensed math teacher in Virginia after retiring in May 2014. He has tutored many students from basic math through Calculus. Based on his tutoring and recent classroom teaching experiences, David believes many students, at all skill levels, need personal interaction with the teacher for enhanced understanding and problem solving. He is creating a national math academy with a focus on live, online personalized teaching and tutoring.

Ray Dunn, Tallahassee Consulting, has been retired from Deloitte since 2012, but not from life. He is blessed with excellent health. Since he retired from Deloitte, he has done a data security/pin pad upgrade project for Navy Federal Credit Union in Pensacola, FL. Ray finds the retirement lifestyle to be boring and now does computer consulting work on freelance or contract. He still has the residence in the Chicago metropolitan area.

Henri Eliot, New York Consulting, has been named a fellow of the New Zealand Institute of Management and Chartered member of the Institute of Directors for services to business and corporate governance in New Zealand.

Alpesh Fadia, New York Consulting, is happy to announce the publication of his book entitled *The 5 Behaviors of Effective Personal Leadership...For Ascension To Public Leadership - A Self-Coaching Guide*. The book can be bought at [Amazon](#).

He published the book in June 2014, and was fortunate to be invited to give a presentation in December 2014 to a major financial services firm in New York. Today, he continues to reach out to organizations to collaborate with them in implementing the premise and contents of the book.

Kevin Field, New York Consulting, was interviewed by The Heller Report in Boston. In the interview, he discussed mergers and acquisitions. Kevin has also mentioned that he worked for Deloitte and identified several of the skills that he gained. The interview was distributed through social media and has been read and reposted many times over. It can be viewed on <http://blog.hellersearch.com/blog/cio-skills-gained-from-m-and-a-experience>.

Paul Frascoia, Boston AERS, is the CEO of Critical Process Systems Group, a group of middle market industrial product engineering and manufacturing companies with operations in North America and Israel. They recently announced the creation of CPS Process Solutions headquartered in Maynard, MA to assist life science customers with their process engineering projects and BIM/CAD services. Critical Process Systems Group also recently acquired Diversified Fluid Solutions headquartered in Boise, ID. Paul also joined the board of directors of Unique Fabricating, Inc., a middle market auto and industrial parts manufacturing and engineering business with headquarters in Auburn, MI and operations throughout North America.

Diane Garnick, New York AERS, hosted an event 'A Crude Look at the Market' on CNBC providing insights into an increasingly complex market.

Travis Goins, Tampa Consulting, is now vice president at H2 Performance Consulting and has helped grow the small business by more than 100 percent during the past 12 months. He joined H2 Performance Consulting in 2009 and the company was recognized in 2010 and 2011 as an 'Inc. Magazine 500 Fastest Growing Companies in America' award winner and in 2012 was identified as one of 'Florida's 50 Companies to Watch'. H2 Performance Consulting just announced the recent award of a \$13.7 million contract for Information Technology Support Services for the Marine Reserve Corps Forces Reserves (MARFORRES) and Travis played a key role in writing the technical proposal and will also serve as program director for execution of this technical support contract in New Orleans.

Dorie Golkin, New York Consulting, applied to and was accepted to the Graduate School Assistance Program (GSAP). She attended The Wharton School, where she got the entrepreneurship bug. During her first year, she decided to solve a problem she faced while she was working at the firm by finding high-quality, stylish, and affordable office-appropriate attire. The solution was simple, create a dedicated work wear brand with a bold modern aesthetic to take women from desk-to-anything. With her ex-investment banking co-founder, Emelyn Northway, Dorie launched Of Mercer (www.ofmercer.com) in November 2013.

Of Mercer currently offers designer-quality dresses and blazers to suit the needs of working women in business-formal to creative environments. The brand will be releasing new product lines which include pants, blouses, skirts, and knitwear in the next six months. Since launching a little over a year ago, they have been featured in Forbes, InStyle, People, and a number of other publications.

Ron Halse, Parsippany Services, returned to EisnerAmper, a regional accounting firm in New Jersey as a marketing director. He has spent over nine years at this firm.

Edward Hoganson, New York Consulting, recently joined a public non-traded hospitality REIT called American Realty Capital Hospitality Trust as the CFO. The REIT is targeted to be a \$4B company acquiring hotels in North America.

Kate Kirsch, Philadelphia Services, joined Microsoft Corporation's national marketing team. Specifically, she is part of the enterprise & industry marketing organization as the enterprise executive engagement national leader covering both the Mid-Atlantic and Northeast districts. Kate is based out of the Malvern, PA office and spends time with the Northeast team on a regular basis. She lives outside of Philadelphia with her husband Marty and kids, Jack and Caroline.

Seth Kossman, Baltimore Tax, has been elected as the principal of Ober|Kaler. Seth practices in the firm's Tax and Business Groups. A certified public accountant and former tax accountant, he has been named a Maryland Super Lawyers Rising Star for the past 3 years. Seth is well-versed in the preparation of federal, state and international tax returns. He represents a diverse group of the firm's clients on tax planning, tax controversy, tax compliance and transactional matters. Seth's practice involves many aspects of tax-related issues, including income taxes, employment taxes, sales and use taxes, excise taxes, trust fund recovery penalties, wage and bank levies, tax liens, penalty abatements, offers-in-compromise and installment agreements. In addition, Seth spends a significant amount of his time providing legal counsel to both domestic and overseas clients on participation in various voluntary compliance and amnesty-based programs, including the IRS' Offshore Voluntary Disclosure Programs.

He is experienced with examination, appellate and collection-related matters. Seth represents his clients before the Internal Revenue Service and the Comptroller of Maryland.

To view the full announcement visit their website at www.ober.com.

Lily Ladd, Washington Consulting, continues to be recognized for her professional achievements and dedication to social good. In October, she was recognized as a high-potential leader in her field and selected to attend Dartmouth Tuck's School of Business Executive Summit on Leadership and Strategic Impact.

In addition to her professional advancements, Lily continues to give back to the global marketplace through teaching the next generation of business technology leaders at American University, managing a small charitable organization that focuses on improving human rights and children's education globally, as well participating as a Rotary Club international board member for high school scholarship programs.

In light of her continued efforts on both fronts, she has recently been recognized as a top young leader by the National Association of Professional Women (NAPW), championing women's leadership and advancing other women in business.

Al Leach, Wilton Services, is president & chief strategy officer at MMI, a full service communications firm in Raleigh, NC.

Angie MacPhail, Washington DC Services, left the firm to start her freelance marketing business (www.angelamacphail.com). She was named by LinkedIn as one of the Top 10 most engaged U.S. Marketers for 2014.

She further adds, "It's quite an honor for me and it highlights my belief that social media is a huge marketing opportunity for professional services firms to grow their brand, build their business, develop stronger networks, impact recruiting, etc. I continue to be a huge ambassador and supporter of Deloitte. I am always retweeting/reposting the discussions that my Deloitte network sends my way. I credit my still strong affiliation with the firm as the reason for my being named in this top 10 list. The Green Dot blood still runs through my veins."

David Marion, New York Services, has been focusing on the nonprofit sector. He recently managed strategic communications for a multi-year change-management project at the United Nations Development Programme (UNDP). David created and delivered print, online and broadcast content in three languages to 177 countries, resulting in a highly successful roll out of a new agency-wide accounting standard called International Public Sector Accounting Standards—IPSAS.

A current project involves providing marketing and development services to the Reading Team in Harlem. The Reading Team is an early literacy intervention program for children who are at high risk of reading failure. Established in 2000, it has successfully helped 5,000 disadvantaged children in Harlem achieve substantial and lasting academic success.

Blake McCarty, Atlanta AERS, resides in Lawrenceville, GA with his wife Jennifer, and their four children. He has been practicing law in Georgia as an AV-rated Tax, Estate & Business lawyer and Litigator for the last 31 years. In addition to advising clients in tax law, wills, trusts and estate planning, employment law, business law and regulatory legal compliance, Blake has been counsel in over 550 federal and state cases, which have included federal tax, criminal, employment discrimination, divorce, contract, probate, premises liability and other causes.

Canaan McCaslin, Rosslyn Consulting, was recently selected for Tampa Bay Business Journal's 'Under 30 Up and Comers award.' This award recognizes up and coming business professionals in all facets of business in Tampa Bay. He was nominated by Lutheran Services Florida for the work that he has done since joining them this past summer, helping them with community engagement and public policy work throughout the state. More information and a link about the award can be found at <http://www.bizjournals.com/tampabay/blog/morning-edition/2014/10/new-class-of-tbbj-up-comers-announced.html>.

John McGrady, Washington DC AERS, got married to Kate Litzenberger, Pittsburgh AERS, in 1993, and they have three daughters, Madeline, Sarah and Grace Aged 21, 16 and 14 years respectively.

Kate has recently launched a new business venture and further details can be viewed on <http://www.nextpittsburgh.com/city-design/strength-beauty-numbers-artsmiths-pittsburgh/>; <http://www.post-gazette.com/local/south/2014/10/20/Old-Rollier-s-barn-in-Mt-Lebanon-to-be-remade-into-arts-center/stories/201410200170> and <http://www.popcitymedia.com/devnews/Artsmiths102314.aspx>.

Tammy Meeks, Washington DC AERS, ran the Wineglass marathon in Corning, NY on October 5, 2014. With a 3 hour 50 minute time, she qualified for the Boston Marathon in 2016 should this be 2015?.

Joseph Murphy, Philadelphia AERS, has been teaching a graduate course as an adjunct professor at Lehigh University. In addition, he has picked up the Chartered Global Management Accountant designation through the AICPA and the Certification in Risk Management Assurance through the Institute of Internal Auditors.

Nur-E Rahman, Rosslyn Consulting, moved to the New York area to start her own company called [Knotty Gal](#), which produces knotted, handmade jewelry to benefit girls' education in Bangladesh. She was recently featured in an article on Huffington Post. [Click here](#) to read more.

Steve Ramm, Philadelphia AERS, is spending much of his retirement continuing to write about his favorite subject - music and records - and is now a 'Top 50 Reviewer' on Amazon.com. He reviews CDs, DVDs and entertainment related books. He has also authored a regular review column, Anything Phonographic for The Antique Phonograph and In The Groove magazines. He still keeps his CPA and accounting skills honed by being a board member and treasurer of the association for Recorded Sound Collections (www.auris-audio.org) and international sound archive and private record collector organization. This is his tenth term in that position.

John Rivers, New York Consulting, is the president and CEO of JDR Consulting, LLC, a management consulting firm that offers a range of real estate and financial services that include project management, system implementation, data integration, help desk, accounting, property audit, lease and administration, among other services. JDR Consulting is a tier I independent Yardi consultant, whose team members have been responsible for hundreds of system implementations, conversions and upgrades in their careers. Under his leadership for more than 10 years, JDR Consulting has made it a priority to build strong relationships with its clients' staff to exceed expectations and deliver exceptional customer care.

Randy Rutledge, Atlanta Consulting, was conferred a PhD degree in Conflict Analysis & Resolution on December 31, 2014.

Catherine Samose, Wilton Services, writes articles for the local paper. She loves interviewing people and writing about them.

Stephen Schaeffgen, Hermitage Services, is the president and managing partner of VACO Risk Solutions.

Robert Schapperle, New York AERS, formed RFS Consulting, LLC after retiring from the firm, and has provided consulting and business advisory services. Bob has been a discussion leader for Loscalzo Associates, Ltd., a provider of live seminars in accounting and auditing, and has been a speaker at various seminars, including the Practising Law Institute. As a consultant, among other activities, he has assisted in designing all of the accounting and financial reporting systems and financial controls for a recently established registered financial adviser which now manages in excess of \$3 billion in investor funds.

He recently became a partner in the Executive Partner Program at the William & Mary School of Business. The Executive Partners act as leadership development coaches, judges in case presentations, panel members in classroom discussions, and provide active advice in field consultancies and career counseling to business school students.

In addition to his other activities, Bob serves as a member of the finance and the marina committees, and chair of the audit committee, of Two Rivers Country Club in Williamsburg VA, and as a volunteer at the Jamestown Settlement. In his spare time, Bob is a golfing and marina member at Two Rivers.

His wife, Fran, is also active in the Williamsburg community and in country club activities. He is also proud of his three children. Michele is the vice president of an insurance brokerage in Pennsylvania; Christine is a student at Christopher Newport University in Newport News VA, majoring in sociology; and Bryan is a consultant with Deloitte's Federal Consulting practice in Washington DC, proudly continuing the Schapperle tradition at Deloitte.

Ken Schwarz, Washington AERS, and his wife Jeanie recently relocated from the DC area, where he has spent most of his career, to the Bay Area. There he has taken the position of chief financial officer of Sungevity, a rapidly growing residential solar company with operations in the U.S., Netherlands and Australia. The company is based in Oakland on Jack London Square and Ken is residing in Sausalito. His kids Steven and Stacey have also pursued careers in Accounting and Finance working at Navy Federal Credit Union HQ and Noblis (a government systems integrator), respectively, and both have recently completed their MBAs. He welcomes visitors to the Bay Area!

Linda Senat, New York Services, is now retired and is on the board of a wonderful non-profit doing powerful work in school to help at-risk kids in underprivileged neighborhoods stay in and graduate from school. She would love to see if other Deloitte alumni would be interested in supporting this valuable non-profit, by joining their Board, or joining the Advisory Panel, with financial contributions, introductions to individual or corporate donors, contributions in kind such as after school snacks for the children. Its website is www.counselingschools.org.

Marc Silverberg, New York AERS, has recently joined The Rubin Group of Oppenheimer as director - investments in New York. He will help to manage a midstream energy master limited partnership (MLP) investment strategy on behalf of clients. Their separately managed account (SMA) strategy is focused on midstream energy companies which are primarily involved in crude oil and natural gas logistics, including mission-critical services such as transportation, processing and storage.

Steve Sisk, Hickory Tax, incorporated his practice and purchased a new office.

Joan Stone, Boston AERS, is currently the vice president and corporate controller at Excelitas Technologies, a private equity owned manufacturing company located in Waltham, MA. She attended the 25th reunion from Smith College in 2014 which provided a great opportunity to look back over the past 25 years. She has recently reconnected with many former Deloitte connections on social media. It has been a great way to catch up and stay in touch. She adds, "I will always be grateful to Deloitte and my colleagues there for giving me a solid foundation on which to build my professional career."

Karen Tenenbaum, New York Tax, was recently selected for inclusion in the 2014 edition of New York Super Lawyers as a practitioner in Tax Law. She was also honored as one of the Top Fifty Most Influential Women in Business in 2014 by Long Island Business News, and her Melville, NY law firm, Tenenbaum Law, PC, was ranked as one of the top ten tax law firms on Long Island by the same publication.

Karen's law practice focuses on resolving New York State and IRS tax controversies, and she was co-author of an article on the topic of residency published in the September 2014 issue of the Journal of Multistate Taxation and Incentives. Karen was quoted in the October 2014 issue of The Trusted Professional in an article about the Financial Literacy Committee she founded and currently chairs for the New York State Society of CPAs, Nassau Chapter. The committee focuses on teaching children about handling money and business basics.

Lauryn Wendus, Hartford Tax, recently published her first children's book, Oliver Poons and the Bright Yellow Hat, while in the midst of recovering from an over two-year debilitating case of Lyme disease. The book is inspired by her lovable rescue cat, Oliver, who was her constant companion throughout this life-changing illness. The story is intended to be the first in a series for young children. It is lighthearted, happy, and whimsical and the bold and bright illustrations will bring

smiles to children and adults alike. The book is available for sale on Amazon, in local Connecticut retailers, and on the book's website, www.oliverpoons.com. A portion of the proceeds from sales will be donated to the animal rescue shelter, No Kitten Left Behind, in East Hartford, CT.

Future plans are in the works to expand the Oliver Poons brand to include character-inspired audio soundtracks, children's clothing, and stuffed animals.

Bob Zobel, Ft. Lauderdale Tax, retired this year after over 40 years of service. When most people retire they move to Florida but since they had already been there for almost 30 years, they decided to become 'halfbacks' and move to the Raleigh/Durham area in North Carolina. As for keeping busy, he often asks himself how he ever found time to hold down a job!

West

Kare Anderson, San Jose Services, hosted a TED talk on [Opportunity Makers](#) which has gone viral with over 926,000 views. She also hosted a TEDx talk titled [Redefine your life around mutuality](#). Her book *Mutuality Matters* can be bought online on [Amazon](#).

Barbara Beeby, Boise Consulting, has relocated to a position in the law firm of Doubek Pyfer & Fox LLP in Helena, MT. It is an exciting environment and the people there are welcoming and warm. She stays in touch with many of the people she met and worked with at Deloitte.

Douglas Charboneau, Anchorage AERS, has semi-retired after a 25-year career as a Chapter 11 Consultant and opened a distillery with his son Jean-Luc. They are the second ever legal distillery in the state of Mississippi.

The distillery is located in Natchez and they are currently making white rum with more products to follow. The distillery is combined with a restaurant and liquor store in the oldest building in Natchez, the famous King's Tavern building. The tavern and its history have been featured on *Ghost Hunters* and *Ghost Adventures* (Travel Channel). They can be visited at www.Charboneaudistillery.com or stop by for a tour and taste!

Tim Durbin, San Francisco Consulting, competed in the World Marathon Challenge on January 17, 2015. He was one of 10 people attempting to run seven marathons on seven continents in seven days. The field is global and he is the only runner from the U.S. who attempted this challenge in 2015. As part of the challenge, he is attempting to raise \$77,777 for The V Foundation for Cancer Research (<http://www.jimmyv.org/>). More information on Tim's journey can be read on his website and blog [here](#). He would love to have Deloitte alumni help spread the word via the web or social media. This support will help him expand the reach of his efforts and continue to raise money for The V Foundation.

Mark Fisher, San Diego AERS, is now the chief financial officer for the Roman Catholic Diocese of San Diego. He is responsible for overall financial management of the Diocese including budgeting, investments, risk management, real estate and contracted benefits. The Diocese of San Diego includes 98 parishes, 14 missions, 36 preschools, 46 elementary schools, six high schools and two universities with nearly one million Catholics. Mark retired as an officer from Sempra Energy, a Fortune 500 company, in 2014.

Samantha Fordyce, San Francisco Consulting, has joined the development office of the Solano Community Foundation in Fairfield, CA. In this position, she is responsible for the publicity and public relations of the organization, as well as fundraising and donor relations.

The Solano Community Foundation is a charitable organization dedicated to improving the lives of the people of Solano County in California. They have more than \$9 million in endowment funds (both restricted and unrestricted) under management. Annual grants are made to Solano County nonprofit organizations, and have been given for such purposes as a program to help seniors live healthier lives, for teen-agers at risk, for pediatric health, for music programs in the schools, and for family service agencies. In addition, numerous college scholarships are awarded to students who graduate from Solano County schools.

Lisa Francesca, San Jose Services, has just published a book. In response to more and more couples asking their friends and family members to perform their wedding ceremony, *The Wedding Officiant's Guide* is a slim and comprehensive manual for first-time wedding officiants. It is available in paperback and e-book formats through Barnes & Noble, Amazon, Indiebound, and other websites.

Trained by her late father, Lisa has performed all manner of weddings throughout California and in other states. Her book covers topics such as writing the wedding, managing rehearsal, cultural rituals and readings, acquiring the witness signatures, and ensuring that the marriage is legal. More information can be found out about her upcoming author events on her blog at www.lisafrancesca.com.

Shari Freidenrich, Costa Mesa AERS, was officially sworn in as the Orange County, California Treasurer. Orange County is the sixth largest county in the nation with a population of over 3.1 million residents. Shari was re-elected this past year and ran unopposed in her bid. She was elected as the Orange County Treasurer in 2010 receiving over 650,000 votes, almost 10 percent more than her closest opponent, receiving over 54 percent of the votes. In the past four years, Shari has implemented best business practices and streamlined county operations saving taxpayers over \$820 million. Shari has improved customer service to taxpayers and increased the transparency of public information on the county's website at ttc.ocgov.com. The county currently has the highest collection rate ever recorded at over 99 percent and during the last property tax installment payment period, had average wait times for taxpayers paying in person of less than 10 minutes.

Matthew Goldman, Los Angeles Consulting, sold his startup, Wallaby Financial, to Bankrate, Inc. He remains with the company as Wallaby's CEO operating in Pasadena, CA as a subsidiary. Wallaby was founded in 2011 and provides mobile and web applications to help consumers maximize their credit card usage.

Maria Ku, San Francisco Tax, continues working in her private CPA practice as an experienced accounting/tax professional CPA with long-standing expertise within individual tax services. She also enjoys teaching accounting courses at the Diablo Valley College and at the Laney College.

In her personal life, Maria and her husband are focused on supporting multi-faceted interests of their two teenage daughters. The family activities they enjoy together are biking, hiking, world travel every summer, live theater and books.

Tony Pohl, San Francisco AERS, took a third in the Corinthian (amateur) Farr 40 worlds. His boat was the top placed U.S. boat in the Corinthian fleet losing only to Turkey and Canada.

In addition, he is now the proud grandfather to two new grandchildren, a boy and a girl, born to his daughters.

Dianna Stanley, Orange County Consulting, left her full-time employment to return to independent consulting in the SAP area.

Eric Stattin, Los Angeles AERS, wishes Happy New Year to all his old partners and professional colleagues. His wife Marty thinks his counting skills are slipping. He feels he shouldn't have let his CPA license lapse. Eric hit six holes in one on the same round while playing golf and he spends most of the time saving the world.

Suna Taymaz, San Francisco AERS, is now the director of strategy at Pacific Gas and Electric.

Mayra Villalta, Los Angeles AERS, recently moved back to Los Angeles and is now a senior internal auditor at Cedars-Sinai. Prior to relocating, she was a senior internal auditor at Health Net, Inc. with their government services division located in the greater Sacramento area. Additionally, Mayra obtained the Certified Internal Auditor (CIA) certification in July 2014.

Alvin Wong, Los Angeles Consulting, has ventured into a new experience of entrepreneur and business owner. He feels that it is at times scary, rewarding, and not for the faint of heart. He often finds himself drawing upon the skills and friendships built during his years at Deloitte to help build the business as an independent consultant focused on data analytics and business market strategy.

His son Alex, an Eagle Scout, got the chance to walk the Tournament of Roses Parade in Southern California this year as part of the Boy Scout Honor Troop to carry the Bob Hope Trophy award banner for the most humorous parade float. Alex said it was an amazing experience despite having to help carry the 50 pound pole for the five miles of the parade.

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