

The Network September 2014

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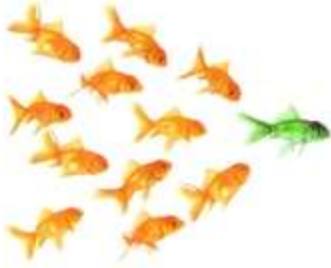
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News About You

September 2014

AERS

Monty Allen, Tampa AERS, is working part-time as finance advisor at LENSAR in Orlando, FL. He is also the director of Iradimed and working as a Business consultant for others.

Nageen Arunachalam, New York AERS, runs a very small medical practice (family owned so an employee and employer interest), works constantly 24/7 and is getting experience in all aspects as Obamacare sets in. He has three kids - one a Duke University rising sophomore, one in eleventh and the last, the bonus and surprise, a rising second grader.

Jen Bartrim, Columbus AERS, is now Director of the Account Reconciliations team at Nationwide Insurance.

Suresh Bhat, San Francisco AERS, has recently left his role at BlackRock to be the CFO of the Haas School of Business at UC Berkeley. Prior to this, Suresh was the division CFO for the retail distribution, retirement service and international businesses at Charles Schwab & Co., Inc. He began his career at Deloitte and also spent three years at Bank of America in various finance-related positions.

Rich Brody, Philadelphia AERS, is completing his second year as a Regent of the Association of Certified Fraud Examiners (ACFE), the world's largest anti-fraud organization and premier provider of anti-fraud training and education. He is the Douglas Minge Brown Professor of Accounting at the University of New Mexico and is a Daniels Fund Business Ethics Fellow. He was the 2012 ACFE Educator of the Year and was recently recognized as the Outstanding Educator by the New Mexico Society of CPAs. He serves on the Board of Advisors for *Fraud Magazine* and is on the Board of Governors for the Albuquerque Chapter of the Institute of Internal Auditors.

Rich has authored or co-authored more than 90 refereed publications and has made more than 130 presentations at national and international conferences and seminars. He serves as an expert witness and has experience in both civil and criminal cases. He has worked with the U.S. Secret Service, the U.S. Department of Justice, the New Mexico Attorney General's Office, and the Second Judicial District Attorney's Office in New Mexico.

David B. Brooks, AERS, recently moved back home to Nashville to lead a commercial real estate finance team covering Tennessee for BB&T, a financial services company. They provide debt financing to developers and investors for the construction, acquisition and recapitalization of all types of CRE and are actively seeking new investment opportunities.

Tom Calcaterra, Detroit AERS, was recently elected to the board of directors of Genicon, Inc. He also was appointed CFO of the company.

Arthur G Cayley, Los Angeles AERS, was married to Alexander R Lane on October 2, 2008. Art and Alex live in Valley Glen, CA. Art is the controller and CFO of Sieroty Company Inc.

Keith Chapman, Dallas AERS, has recently become one of the founding principals in The Oil and Gas Advisor, an M&A firm specializing in oil and gas related companies. The four principals have 100+ years of combined experience in the oil and gas industry. The firm specializes in all types of oil and gas related companies from service companies, drilling, pipeline, gathering, mid-stream, distribution of fuels, lubricants, and gases (including propane), and manufacturing companies producing oil and gas related equipment and products.

William Colin, New York AERS, was employed by MacNicol, Johnson & Co. from 1965 to 1968. After that he went into the private sector, mostly the healthcare industry and retired in 1993. "I have three sons two of whom became attorneys in 1993 - one as a prosecutor (Assistant District Attorney) in Santa Clara, CA, and the other specialized in family law and eventually became the number one child custody attorney for the entire state of Connecticut. Then the prosecutor ran for the elected 2013 Office of Judge and won the primary with enough votes to make it unnecessary to run in the November 2012 elections. His younger brother by 13 years was nominated by the Ct. Gov. (Malloy) in 2013 to be a Superior Court Judge. Imagine two sons 13 years of age different, graduating Law School in the same year and then becoming Judges in the same year, 20 years later, and they live 3000 miles apart."

"I cannot top these events and this happenstance is 100% factual and truthful. Oh, yes, I have been and still am happily married to the same woman and mother of these two gentlemen, named GEORGEANN, a total of 65 years. Our number one son was and still is a very successful member of the investment banking industry."

William (Bill) Colin, formerly a resident of Brooklyn and Malverne, NY and now Southbury, CT.

Michael J. Corbett, Boston AERS, has recently joined PC Construction as senior vice president and chief financial officer. He brings to PC Construction more than 30 years finance experience in the construction industry and related businesses. Corbett served most recently as the director of finance and corporate services for The PENTA Building Group, LLC, in Las Vegas and is a distinguished financial and administrative leader in the industry. He also serves on the board of trustees for Wentworth Institute of Technology and as Chair of the Institute's Audit Committee. As the chief financial officer, Corbett will take on a key executive leadership role utilizing his proven expertise in financial analysis, growth management and strategic business planning, while maintaining responsibility for all accounting, information technology and risk management functions.

William J. R. Cox, New York AERS, is married to a wonderful lady named Maureen. Together they have seven children, eight grandchildren and four great grandchildren.

After leaving the firm, he moved on to an assistant vice president position at Chemical Bank in charge of the Holding Company's SEC filings. During that time the family moved to a small town in central NJ and for the next eight years he commuted into downtown NY, Water Street location. Getting tired of the commute, he placed his resume on the street and interviewed with many companies in NJ, PA, MI and CO. Thereafter he joined a San Francisco bank named Crocker Bank for a head of accounting position in the Controller's office and the family moved to Concord, CA for approximately eight more years. The bank was acquired by Wells Fargo and William decided to seek a CFO position in a large real estate privately owned company. From there he moved on to a CFO job with a more diverse real estate developer and saw this company through a bankruptcy.

After the many positions and companies mentioned above, William decided in 1989 to open a small CPA firm that provided accounting and tax services to small but medium size companies usually revenues under \$10 million and that firm still exists 25 years later.

He adds "I would like to thank the people of Haskins and Sells that provided me with the training that opened the many job opportunities in large and small companies that I was so blessed to work for."

John T. Cuckler, Cincinnati AERS, has moved from the position of associate vice president of advancement services and controller of the Bowling Green State University Foundation to controller of the University of Toledo Foundation.

Dolly (Van Hoeck) Daniell, Orlando AERS, was named the Senior Director of Administration and Technology at the Greater Orlando Aviation Authority.

Len L. Davis, New York AERS, is currently senior vice president & chief financial officer, SUNY College at Old Westbury. He was formerly the general auditor NYC Transit Authority and auditor general NYC Board of Education. He holds CPA, CIA, CFE certifications. He married Theora Rivers and their children, Derric and Danielle, have now grown up.

Harry DeMaio, Cincinnati AERS, has just signed a contract with MX Publishers in London to publish his five volume series – The Case Books of Octavius Bear – Alternative Universe Mysteries for Adult Animal Lovers. The books are tongue-in-cheek detective stories featuring an all anthropomorphic cast of animal characters. In the series, homo sapiens died off 100,000 years ago in an extreme solar storm leaving the remaining animals to advance physically, mentally and socially to a civilization not unlike 21st century Earth. These are not kids' books although precocious teenagers have enjoyed them. Book One, *The Open and Shut Case*, is available on Amazon in both softcover and Kindle form.

Joseph DiMario, Pittsburgh AERS, received an honorary doctor's degree in business administration from LaRoche College this year. He has served on the board of LaRoche in a number of capacities including the board chair for three years. He has also been part of their adjunct faculty. He will receive in October a distinguished alumni award from Carnegie Mellon University. Joseph is currently the chair of the Planning Commission in the community in which he resides. He also has been the board chair of several non-profit entities. He has been an EVP of a major international bank, the SVP of regulated regional bank, the CEO/Vice Chair of a regional manufacturing company, managing director of his own consulting company and most recently the director of Stewardship/Development/Planned Giving of diocesan foundations.

Doug Edwards, Manhattan AERS, left to become a controller at one of Touche Ross' clients. He had several jobs based on Touche leads culminating in becoming the CFO of the largest executive office suites company. Currently he is living in Florida. I have a small practice in Spring Hill concentrating mostly on income tax preparation for individuals and small business. I offer advice on retirement planning, budgeting and forecasts.

My main interest in the off season is building hot rods. I have had several of my cars featured in national magazines. My current completed car is a 1938 Dodge which I use as a daily driver. My current project is a full frame off restoration of a 1967 Volkswagen Beetle, my first real adult car after leaving the Army in 1970. It should be completed in about two weeks. My next project is a WWII, P-38 Belly Tank which I am building as a streamlined "Lakester" to be raced on the Bonneville Salt Flats in Wendover, Utah. It should be completed in about 18 months.

Jeremy Etrass, Atlanta AERS, and his wife, Carrie, are blessed with their first child, Delaney Leigh Etrass, who was born on May 20, 2014.

Ray P. Feiffer, Raleigh AERS, was appointed as associate dean for undergraduate programs at the Neeley School of Business at TCU as of July 1. He was formerly the chair of the accounting department from 2009-2014.

Brad Freeman, Tampa AERS, has been working for United Soccer Leagues as the director of finance/controller for the last three years. During that timeframe, he married the love of his life, Elvita. They have moved into a bungalow near the Palma Ciega Country Club. They have recently had an addition to the family, Elise Addison Freeman.

Brad Galbraith, Chicago AERS, is the proud father of Miles Asher Galbraith, born March 28 in Naples, FL. Brad is a Florida Bar Board Certified estate planning attorney and is the co-chair of the estate planning group at Hahn Loeser & Parks LLP.

Jeff Goldfarb, Washington, DC AERS, was promoted to senior VP global controller for Jacobs Engineering. Jacobs is a \$12 billion leader in the engineering and construction industry, headquartered in Pasadena, CA.

Shawn Gong, Los Angeles AERS, is currently a 4D product manager at the world's leading Augmented Reality Company *Daqri* located in Los Angeles.

Lilibeth Hanlon, Parsippany AERS, has published two webinars for Thomson Reuters on risk management this year; one on end user spreadsheets and the other on cybersecurity for the practitioner and their clients. She provides CFO and CIO advisory services with Bridge Strategies LLC.

John Harrison, Nashville AERS, in May 2014 accepted the role of vice president, revenue management for Iberia Airways, the national airline of Spain. He is based in Madrid reporting to the chief commercial officer and responsible for all pricing, inventory control and revenue forecasting for Iberia, which, along with British Airways and Vueling, is owned by the International Airline Group (IAG) based in London. He moved to Madrid from Melbourne, Australia, where he was formerly general manager, Australia for Air New Zealand. His wife and two children will soon join him in Madrid where they all practice Spanish and enjoy the Mediterranean lifestyle including a vino tinto or two along with their tapas.

Bill Houlihan, New York AERS, is currently the audit committee chairman and the lead director for Tiptree Financial, a NASDAQ listed holding company. It owns an insurance company, a CLO manager and a healthcare finance company and has investments in other financial services entities. Five Oaks Investment Company, a NYSE listed credit sensitive residential REIT, which purchases securities and loans. He is the audit committee chairman and the non-executive chairman of the board for First Physicians Capital Group; it provides services to and owns interests in small hospitals; it is SEC registered but has very limited trading activity. He is on the board of Mortgage Asset Exchange, a privately owned startup for electronic trading and insurance of residential mortgage loans; it has raised two rounds of venture capital.

Shaila Kapur, Philadelphia AERS, recently became customer experience executive at Independence Blue Cross.

Kevin Kimball, Orange County AERS, currently works as an associate professor of accounting at Brigham Young University – Hawaii (BYU-H). He recently returned to BYU-H after taking a one year sabbatical during which he created a free Massive Open Online Course titled Introduction to Accounting and was published in January 2014 on the Canvas Network.

Jo-Anne Kunin, Miami AERS, founder and CEO of Kunin Associates is pleased to announce its merger with Atlantic Partners, one of the nation's leading IT staffing firms. Kunin Associates has been a leader in the accounting and finance placement arena in South Florida for more than 20 years. The firm has recently launched AKP, the strategic partnership with Atlantic Partners providing comprehensive IT staffing solutions along with a robust executive search division, offering services from staff augmentation, to contract for hire, to direct placement. Atlantic Partners Corporate offices are located in Boca Raton, FL, as well as Atlanta and New York City and their corporate clients include Jet Blue, Saks 5th Avenue, Weight Watchers, Web MD, Michael Kors, CBS, and Prudential Insurance Company. The merger will allow Kunin Associates to satisfy their clients' increasing demand for technology staffing needs, and to benefit from the same exceptional personalized service and expertise in both the accounting and finance industry and the information technology field. Kunin Associates is located in Fort Lauderdale, FL.

Paul Lacroix, Columbus AERS, has been married for 38 years to his wife, Melissa, and they have three children and two grandsons. His son, Paul, worked in Chicago AERS from 2004 to 2011. Paul senior currently serves on two not-for-profit boards: Capital University's audit committee and the Bexley Community Foundation. He plans to spend some time in the winter in Naples, FL where they own a condominium, Pelican Bay.

Judy Lau, Seattle AERS, recently transitioned to a new role as accounting manager at T-Mobile, USA in the Corporate Accounting group.

Betty Lehman, Denver AERS, was operating as a single parent by the time her son, Eli, was a year old in 1989. By his sixth birthday, Eli had 36 medical diagnoses, one of which was autism. It was everything one could imagine — heart-breaking, terrifying, and exhausting — but it was also infuriating. The world of disability more than two decades ago was a landscape of sparse resources and fragmented terrain. The true tragedy was not simply Eli's health and development, but that she had to devote as much time to navigating and fighting systems as she did to taking care of her son.

To create a more just, responsive and humane world for Eli, and all Colorado families with special needs children, she became a statewide leader for change, working within the Colorado early intervention system, public and private

health insurance industries, and disability initiatives and medical practices. She has successfully spearheaded 14 Colorado statutes to improve the quality of life for people with disabilities and their families. She served as the Executive Director for The Autism Society of Colorado, chaired the Colorado Autism Commission and the Colorado Division of Insurance Consumer Council.

After a diagnosis and treatment regimen have been established, most parents' greatest fear is what is going to happen to their child if something happens to them. When Eli was three, Betty purchased AICPA life and disability insurance and established a Supplemental Needs Trust. She wrote a letter of Intent including all she knew about him and his care needs plus what she hoped would transpire for his future. Three domains impact a family's ability to ensure protection of their assets and children: disability benefits, financial management, and legal documentation. Collaboration of all of the family's advisors is required to have a fully considered life care plan for their children.

She is now a disability advisor with Lehman Disability Planning, LLC. She works collaboratively with CPAs, attorneys and financial advisors. She shares the wisdom gained on her own journey with parents and guardians of children with special needs who are also determined to build a brighter future for their loved ones. She offers the services that address areas of planning that have been essential to the success of her journey. Please visit the website, www.lehmandp.com.

Rodney Lenfant, Houston AERS, has stayed very active over the past four years since his retirement from the firm. After leading the financial and consulting practice in the Houston office of Accretive Solutions for a year, one of Rodney's clients, Atlantica Tender Assist Drilling, a start-up international offshore drilling contractor, hired him to lead their worldwide accounting function, which he did on a full-time basis for a year and a half until he got a call from fellow Houston alum, Joe Freudenberger.

Joe is the CEO of OakBend Medical Center in Richmond, TX. Joe, also a former CFO client of Rodney's, was in need of a new CFO and asked Rodney if he would consider the opportunity. Rodney agreed to help out on a part-time basis for up to four months (nights and weekends with the permission of the folks at Atlantica) while the hospital was refinancing all of its existing indebtedness. After three months on the job, Rodney's passion for healthcare was reignited, and he decided to take that role on full-time and simultaneously converted his full-time position at Atlantica into a part-time role, one in which he remains a shareholder, hired and trained his replacement and continues to satisfy the financial reporting and complex accounting needs of this rapidly growing organization, which has two rigs under long-term contracts with Total and Petrobras off the coasts of the Congo and Brazil, respectively, with two more being built in China.

Since his return to healthcare, Rodney has become a Certified Healthcare Financial Professional, was appointed to the Board of the Texas Gulf Coast Chapter of HFMA, and continues to serve on the Audit and Compliance Committee for Catholic Health Initiatives, the third largest non-profit health system in the U.S.

Marianne M. Lilly, Detroit AERS, was admitted as a partner in Novi-based accounting and business consulting firm ShindelRock, where she had been a senior manager.. Marianne leads the audit practice and is responsible for managing the firm's assurance engagements, including financial statement and compliance audit services. She serves audit clients in the areas of employee benefit plans, middle market businesses, franchisor financial statements and nonprofit organizations. She adds value by advising clients on strategic control implementation and process improvement. Outside of audit work, Marianne is a member of the Firm's litigation support team, assessing value and calculating damages for clients involved in litigation. She also provides fraud examination and business valuation services.

John McGown, Denver AERS, has been selected as one of three attorneys in Idaho to receive the 2014 Distinguished Lawyer Award from the Idaho State Bar. More information can be found on <http://www.hawleytroxell.com/2014/07/john-mcgown-named-distinguished-lawyer-of-the-year/>.

Lori McNulty, New York AERS, and her husband Craig Stevens, former senior manager in Deloitte's New York Risk Accounting practice, gave birth to their first child on June 28, 2014. Their son, Chase Thomas Stevens, was 21" long and weighed 7lbs 8oz. Craig recently joined WR Berkley Corporation in Greenwich, CT as the corporate international controller. Lori works at HSBC Group in their corporate operational risk division.

Hal Meyer, San Jose AERS, has been providing much needed and appreciated EDGAR filing services to hundreds of companies for the last 20 years. He is based in Rancho Mirage, CA with his wife of 25 years and enjoys all of the benefits of a resort community while maintaining a very busy professional work schedule. They stay fit and active and

look forward to at least the next 20 years of enjoying professional work associations and enjoying their direct family in Rancho Mirage, Northern California, and Colorado. "I am so blessed to have been in the San Francisco and San Jose offices where I spent many valuable years with great people."

Eva Minsteris, New York AERS, is now a partner at JSB Partners, the leading national executive placement firm specializing in the alternative asset management industry; she has more than 15 years of experience in executive search and placement. Eva has been a member of the board of the New York Affiliate of the American Woman's Society of Certified Public Accountants for 15 years and twice served as its president. Currently, she serves as director of corporate relations, director of job bank and director of scholarships for the organization. She is a graduate of the University of Connecticut, where she earned a Bachelor of Science degree in Accounting.

Cy Nelson, Minneapolis AERS, is currently employed with Hillandale Farms Inc. as an accountant at West Union, IA.

Janis Deets Nowak, Chicago AERS, founded AmericanWay Management Corporation and has been a leader in the long-term care profession for 30 years in various capacities throughout the United States. After years of auditing, consulting and helping clients assess the feasibility of their long-term care projects, she has for the past 15 years focused solely on the provision of quality care in the assisted living environment. Founding AmericanWay is the fulfillment of her dream to establish innovative senior living environments where residents and staff alike are able to grow and flourish, and the concerns of residents are top priority.

This summer, AmericanWay created a YouTube channel to display video episodes titled "What Does the Blonde Say?" These videos include subject matter experts speaking on hot topics weighing on the minds of professionals in the assisted living industry. The videos are meant to be fun, conversational, and informative. The panelists by no means intend to come across as having all the answers to today's challenges in assisted living; rather, they wish to share their great passion for building more positive and productive work cultures and to aid in increasing the overall quality of care offered to the residents we serve. They are sharing their perspectives and experiences of what has worked and not worked for them and invite other professionals to join in the conversation! This platform intends to foster continued dialogue and support on important topics that impact all professionals in assisted living. Her work can be viewed at <https://www.youtube.com/user/WhatDoestheBlondeSay>

Parvinder Parmar, Dallas AERS, has become a Certified Health Data Analyst (CHDA) and is now working as a data analyst at Baylor Scott & White Health. The CHDA credential is administered by the American Health Information Management Association (AHIMA).

William Pohlman, Los Angeles AERS, married **Barbara Pedley Pohlman**, an alumna of the Los Angeles office.

Mark Rieder, New York AERS, is Senior Vice President, Portfolio Manager at GIC Asset Management Pte Ltd, the sovereign wealth fund of the Government of Singapore. Mark joined GIC in July 2013 as the senior corporate credit PM in New York covering high yield, distressed, and IG markets in US, Latin America, Europe, and Asia. He is supported by a team of global research analysts and traders in Singapore, London, and New York. He lives in Greenwich, CT with his wife, Lauren Schwartz, whom he met at Deloitte's New York office, and their 4-year old daughter. Lauren is global head of operational risk management at RBS Markets in London.

Josh Robinson, New York AERS, has recently accepted a senior manager level role at EY (associate director) in the Private Equity market segment. "As the Global Business Director for KKR, I'm working hard to meet the challenges of managing a global client and bring all of EY to meet their needs. I do miss all my friends at Deloitte but am making many connections both at EY and at the client. The travel schedule is of course hectic, but I love it! I look forward to staying in touch with my Deloitte alumni as my career continues to develop."

G. H. Schirtzinger, Los Angeles AERS, is approaching 20 years as a CEO. It's been full of "interesting times." His kids are doing very well and he continues to do track days with his aged Subaru WRX, which is still fast with 96K miles on it. He also tries to get a hunting trip or two in annually. He took two boars last fall and is hoping for a deer this fall.

William Schult, Cincinnati AERS, informs us that former Cincinnati Audit Partner-In-Charge Jacob Metz is getting married in December of 2014.

Meena K. Sheth, Chicago AERS, is now a VP, senior manager and head of governance at BMO Financial Group in Chicago. She was previously at Navistar in Chicago for five years.

William (Bill) Skinner, Atlanta AERS, is the vice president - corporate treasurer/controller for Gulfstream Aerospace Corporation, an \$8 billion maker of the world's finest business jet aircraft including its most recent aircraft, the ultra-high speed G650. Bill provides leadership and oversight to all of the financial reporting, treasury, tax and financial planning processes for this global corporation headquartered in beautiful Savannah, GA.

The father of three, two in college and one who just recently graduated, and his wife, Nancy, are active in the Savannah community where Bill serves on the board of trustees of the Telfair Museum, the South's oldest art museum, and where Nancy is active with the Bethesda Home for Boys, the oldest child caring institution in the country. Bill has served on the board of the Savannah Chamber of Commerce, the CEL Savannah Library Board, and the board of trustees of the Savannah Country Day School, and he is currently active with the board of visitors at the University of Alabama's Culverhouse School of Accountancy.

Mike Skorupski, Detroit AERS, is pursuing his Executive MBA degree at Copenhagen Business School while working full-time heading the Risk and Internal Control function at Siemens Wind Power, a renewable energy powerhouse of the Siemens conglomerate. His three-year journey has successfully concluded with the baggage of new experiences, great professional and personal enrichment, but above all, an expanded network of friends and colleagues. They have decided to name their upcoming baby son with the memorable old Nordic name "Viggo" to commemorate their voyage and a pleasant stay in the historical and spiritual home of the Vikings.

Max Smith, Grand Rapids AERS, has been elected as chairman of the board of the Isaac Charitable Foundation Stichting, located in Amsterdam, Netherlands. The foundation provides funding for missionaries and missionary ministries in various countries in Europe and Africa.

Peter Solberg, Minneapolis AERS, is happily retired from work. He is pursuing another degree at University of Minnesota (History).

Eric Stattin, Los Angeles AERS, has been tracking seizures of cash from drug dealers for almost six years. So far it adds up to about \$3.3 billion and climbing about \$8 to \$10 million per week. There have been an amazing number of multi-million dollar seizures. The FBI is active in this area too. It has made some multi-hundred million dollar seizures. The data was printed in the Wall Street Journal but now it's only available on a website. The address is www.forfeitures.gov and data of access seizures from DEA, FBI, Secret Service, and a couple of other federal agencies can be viewed.

Karl Strube, Fresno AERS, married Heidi Wiser on December 12, 2013. He currently works as the controller for National Raisin Company, the second largest processor of raisins in the U.S. Karl obtained his CGMA designation in July 2013.

Jonathan Suh, New York AERS, has accepted a short term re-assignment in Credit Suisse's London office, through November. During this time, he will assist with the bank's Advanced Measurement Approach operational risk model and Internal Model Method waiver for credit risk.

Rick Treatch, Los Angeles AERS, earned his doctorate in Organizational Leadership from Indiana Wesleyan University by successfully defending his dissertation on May 30, 2014.

John Tutuska, New York AERS, has retired as a partner at Morreale & Tutuska. He lives with his wife, Antoinette, and daughters, Jennifer and Anne.

George Vaughan, Los Angeles AERS, is entering retirement phase three on January 1, 2015. He wishes the best to Deloitte.

Philip Weintraub, Wilton AERS, has been admitted into the doctorate program at the London School of Hygiene and Tropical Medicine (LSHTM), the United Kingdom's Graduate Medical School.

Philip and his wife, Janice, will be temporarily relocating to London, England in order for him to attend the London School of Hygiene & Tropical Medicine's DrPH program in Public Health & Policy, Department of Health Services

Research and Policy. Janice is hoping to volunteer in London. As a successful trial attorney and former Palm Beach County Assistant State Attorney, she is interested in volunteering with an organization within England's justice system. However, at the moment, their first priority is finding a place to live in close proximity to LSHTM (Camden Borough of London). Philip and Janice are looking forward to meeting people with different backgrounds and perspectives from throughout the world.

Greg Wieman, New York AERS, began 2014 by accepting a role within the internal audit department at Google, based out of their Mountain View, CA office. He also relocated from Manhattan to San Francisco with his wife, Karen, whom he married in New York in May.

Edwin Wong, Stamford AERS, created and presented a crash course for newcomers to New York City entitled, 'Welcome to America 101 - Bridging Cultures, Connecting Everyone' in January 2014. The presentation aims to help corporate professionals visiting or transferring from overseas offices, as well as international students coming to US for the first time, on how to adapt to American culture. The presentation is also relevant for anyone visiting NYC and even for local residents. In April 2014, he joined the Board of the Asian American Film Lab, a not for profit supporting diversity in film. Focus on (F)undraising, (I)ncreasing awareness, (L)everaging relationships, and (M)otivating others to get involved. More information can be seen at <http://www.prlog.org/12321555-edwin-wong-elected-to-the-board-of-directors-of-the-asian-american-film-lab.html>.

James Yostrum, Allentown AERS was appointed as CFO of Mity Lite. Jim will report directly to the CEO. He will assume all of the duties of the role including managing the financial and IT departments at Mity.

Jim comes from a manufacturing background, primarily with Ward Manufacturing Company and EDG Holdings, both in Pennsylvania. He is a CPA and holds many certifications in tax and financial management disciplines. He also has significant experience in IT and ERP implementation and will be instrumental in our upcoming system upgrade. Jim, his wife, Patti, and their three children will be relocating to Salt Lake City from San Antonio, TX as soon as possible.

Dave Zuelke, Minneapolis AERS, sold their home on the fifth hole of Hazeltine golf course (Chaska, MN) in December and moved to a new townhome in Waconia, MN. He is adjusting to retirement and is still on a non-profit board of directors. Dave is very active in his church where he is the coordinator of the group that packs food once a month at Feed MY Starving Children. He is also planning to volunteer at the local hospital which is only a half mile from their new home.

DTT

Chuck Horstmann, New York DTT, was recently appointed by the Monitoring Group to the international Public Interest Oversight Board (PIOB). He is currently living in the San Francisco area. Information on the PIOB, its role, members, etc. can be found at www.ipiob.org.

Consulting

Raman Batra, Austin Consulting, joined AT&T as a product director to help build the company's public cloud program. After launching three Cloud Products, his responsibilities have grown. As a senior director, he has the following additional responsibilities:

- Enterprise Strategy for a \$1B business unit, working on classical Telco Strengths to grow Revenue in Edge and Direct areas of Managed Applications, Cloud, Security and Mobility.
- Enhancing the Digital Experience for a portfolio of Cloud Products.
- Developing a Big Data Public Cloud Strategy for AT&T including Technical Architecture, Deployment Methodology and P/L Economics.

Raman also completed a Course on "Challenges of Big Data" from MIT's CSAIL Lab – where a lot of big data innovations have taken place. He shared that "the Deloitte DNA always helps you in every walk of your life!!"

Kelly Quann Bianucci, Denver Consulting, became the managing principal of *Discover Capital LLC*, a private equity firm based in Arvada, CO in early 2014. She also sits on the board of directors for *Hypr*, an online advertising platform, and *SeedPaths*, which provides youth and adults with software development skills and offers a direct path to employment through its unique recruitment model, as well as holds advisory and investor roles for several startups and non-profit organizations, including the Colorado Innovation Network. She still rides with Team Deloitte every August in Tour de Cure Colorado, which benefits the American Diabetes Association. This year's Tour is special as

Kelly is riding in honor of her grandmother, who passed away in June 2014 from complications of diabetes. Team Deloitte is close to being in the top 5 company fundraisers.

Marty Brown, Cincinnati Consulting, earned an MBA from Wharton in 2011. During business school, he interned with Zynga in San Francisco and then worked full-time for Zynga in New York City for two years. Since leaving Zynga, he has worked for a variety of consumer technology start-ups as consultant and as a full-timer.

In September 2014, Marty married his high school sweetheart in Indianapolis, and soon after, the couple moved from New York back home to Indiana. Marty and Lauren are now settled in downtown Indianapolis, where Marty serves as Vice President of Marketing for One Click Ventures, an e-commerce company focused on eyewear.

Elizabeth (Beth) Campbell, Detroit Consulting, was recently awarded her doctorate in Organizational Behavior and Human Resource Management from the University of Maryland business school. She studied leadership development, team development, and unintended consequences of individual high performance at work. She has joined the faculty of University of Minnesota's Carlson School of Management as an assistant professor where she will teach a core management course to incoming freshman and an elective leadership development course to MBA students. She cites her time at Deloitte as instrumental to her success in research and teaching, and has stayed close with many members of her 'Green Dot' family since leaving the firm in 2009.

Scott Chao, Dallas Consulting, is pleased to announce that he and his wife are celebrating the birth of their first child, a daughter named Audrey Chao. She was born on June 17, 2014 weighing 7 lbs. and 7 ounces, measuring 20.5 inches. Both the mother and baby are doing great and Scott is drinking much more coffee than before!

Kevin Chenoweth, Denver Consulting, welcomed a second addition to their family: Elena Therese Chenoweth at 5 lbs. 14 oz. on June 22. They still drive a hybrid and refuse to buy a minivan!

Craig Dickerson, Denver Consulting, has joined Harvard Business Publishing in their corporate learning group as an engagement manager. He will be working with clients to create world class leadership development solutions for managers at all levels in global organizations and governments.

Andrea J. Hargrave, Chicago Consulting, recently transitioned to become a full time Lean Six Sigma Black Belt for United States Gypsum Company, where she has been employed for 11 years. She recently spoke at the eyefortransport annual 3PL Summit in Chicago on a panel about Women in Logistics. A video from that event can be viewed at https://www.youtube.com/watch?v=6_A1txBPFLE&feature=youtu.be. Andrea's words for Deloitte: "Thanks for all that you do! I enjoy reading messages and had a great time at the [Chicago Consulting Alumni] event in June at the Terrace at Peninsula."

Steve Huff, Kansas City Consulting, was the beneficiary of one of the greatest recognitions of his life (thus far!) last month. The National Center for Fathering selected him as the Kansas City Father of the Year. The process began with an essay his then 15-year old son, Braxton, wrote for his English class. Braxton's essay was the overall winner for the ninth grade. Steve was then asked to submit information about his approach to being a dad, completed an interview with the organization, and was announced as the winner at a Kansas City Royals game in June. He was very humbled and honored by the award.

KSHB broadcast the story at <http://www.kshb.com/news/local-news/father-of-the-year-honored-at-royals-game> and the local newspaper article is at <http://www.kansascity.com/news/local/article554626/Kids-open-their-hearts-when-nominating-dads-as-Kansas-City-area-Father-of-the-Year.html> . His son's essay is at <https://www.facebook.com/SeamanUSD345/photos/pb.384545628244166.-2207520000.1406771374.786119798086745/?type=3&theater> .

George Isaac, Chicago Consulting, and his wife of 32 years, Shari, have been happily living in Santa Barbara, CA since 2004. George left the Chicago office management consulting partnership in 1988 to lead his family business in Toledo, OH. After nine years of solid growth, he sold the business to a public company and became part of their senior leadership team, executive committee and board. For the past 15 years, George went back to his initial love of management consulting. He operates GAI Capital Ltd. which does private equity and public company investing and family business and family office consulting. He also oversees some operating businesses and is co-manager of GeoZac Holdings Ltd., his Isaac family office. George spends most of his time publishing articles and speaking at conferences, attending board meetings, and consulting to families on succession planning, governance, family dynamics, strategy and operations improvement, and realizing and protecting business wealth creation. Shari, after

leaving her executive position at United Airlines in Chicago, has been active on several non-profit boards associated with education, the arts, and special education. George and Shari have two adult children, Drew and Megan. Drew is a successful real estate investment broker at Marcus & Millichap in Denver and will be getting married next April in Santa Barbara. Megan is an artist in Santa Barbara. To this day, George still appreciates the knowledge and experiences he gained after 11 years at Deloitte Consulting (actually, Touche Ross & Co.) and maintains his relationship with the L.A. Deloitte office.

Satish Kumar, Austin Consulting, truly considers himself lucky for having an opportunity to be part of the Deloitte team. While at Deloitte, he got an opportunity to serve some of the top global and the best clients in the world. Satish says that people at Deloitte have unique can-do and humble way to serve our clients. During his tenure with Deloitte, he learned how to best serve clients through their engagements. Now he is on the other side of the table as a client. Satish is working on an ERP implementation for one of the biggest public sector agencies in the USA. More than 200 people are working on this \$60 to \$70 million project.

As a client, Satish has an opportunity to work with other top global consulting firms He now has more appreciation for Deloitte's unique culture. With all confidence, he can say that Deloitte professionals and alumni are cut from a different fabric.

Doug Laney, Chicago Consulting, has returned to Gartner and leads the research and advisory services on information innovation, big data strategy and infonomics. As a Gartner analyst, he advises dozens of clients each week, speaks at events around the world, and authors research notes. Gartner just formed a new information strategies research team that sits between the core information infrastructure and BI/analytics research teams but caters more to CIOs, chief data officers, and business executives. Recently, Forbes asked Doug to author a regular column on infonomics--the economics of information -- and he has published a few pieces already. This assignment gives Craig the opportunity to venture a bit outside of Gartner's core research.

On the personal front, Doug's family moved back to Northbrook when their son was accepted by a private high school in Deerfield and admitted into the Music Institute of Chicago's jazz program for piano and sax. Doug's wife now has a burgeoning business doing event planning, social media community building and "ghost tweeting" for upstart technology firms. The Laney's are thrilled to be closer to the Ravinia Music Festival, the Chicago Botanic Garden (where they got engaged), the Des Plaines River Trail (biking!), and to their life-long friends in the area, not to mention the tennis club where Doug played as a junior.

Justin Porter, Minneapolis Consulting, left the firm to join the **University of Minnesota Venture Center** and has helped launch over 50 startup companies based on U of MN research. Justin recently completed the Lean LaunchPad Educators Program at Stanford to facilitate startups using the Lean startup methodology. He lives in Minneapolis with his wife **Genna Porter**, daughter Gianna, and son Jude.

Lisa Shatz, Dallas Consulting, was made Assistant Dean, MBA Programs, at UT Dallas.

Jerry D. Stephens, Austin Consulting, moved to KPMG to head their business development for state and local government consulting. From there he worked for Sybase and Silicon Graphics and later to the private sector to establish a high speed internet service company which today serves a thousand business, government, education and residential clients over a 1900 square mile area in Central Texas.

James A. Stokes, Pittsburgh Consulting, has recently started an MVP Staffing Solutions and Apprenticeships company, ON-3. (www.on-3.com) The staffing solutions agency features a candidate-centric focus: they treat and respect the candidates in the same way that they treat and respect the clients. ON-3's fair and transparent policies attract top talent that are looking for a reputable firm to market and represent them.

ON-3 seeks candidates who are *MVPs* (Most Valuable Professionals); people with emotional intelligence, high IQ's and great attitudes. They are exceptional, willing to take on new responsibilities, able to adapt and learn anything, and add value. MVP's are team players and cultural fits!

Through the Apprenticeship Program, they provide aspiring MVPs under contract, contract-to-hire and permanent placement arrangements. These soon-to-be superstars attend a boot camp where they learn business acumen and receive intense training specific to the client's customized curriculum.

Bud Taylor, Dallas Consulting, after leaving Deloitte became the SVP and director of global consulting for Ipsos Loyalty, and then authored an award-winning book as an independent consultant: *Customer Driven Change* which he uses as the foundation for speaking, workshops and consulting assignments.

The accomplishment of which he is most proud after leaving Deloitte is the two and half years he spent consulting to the CEO of Korea Telecom on how to build innovation capability into a highly structured and hierarchical organization. He has completed similar assignments with a marquee set of global clients such as Whirlpool, Microsoft Europe, Toyota-South Africa, Canadian Pacific, Experian-Hong Kong, Sony, The Overseas Chinese Banking Corporation, and the National Commercial Bank of Saudi Arabia.

Sara Berney, Atlanta Consulting, is thrilled to join Wholesome Wave Georgia (WWG) as its new executive director. She is passionate about increasing access to and affordability of nutritious foods and looks forward to building and strengthening local food communities across Georgia. She served as a Peace Corps volunteer in Peru where she trained community health promoters and youth health educators in nutrition education and implemented school garden programs in five primary schools.

WWG's Double Value Coupon Program (DVCP) is a unique approach to create access to and affordability of healthy food for SNAP recipients in Georgia. The goal of the DVCP is to increase the redemption of SNAP benefits at WWG partner Farmers Markets and the consumption of fresh, healthy, locally produced food by SNAP recipients in Georgia. The DVCP aligns with Georgia Health Foundation's grants program, as it enhances the health of some of Georgia's most nutritionally vulnerable populations. It does this by creating access to and promoting the consumption of fresh fruits and vegetables in underserved, low-income communities where healthy food is sparse, expensive and often low-quality. The execution of the WWG program is very simple: Every SNAP dollar spent at a WWG partner Farmers Market becomes two dollars for the shopper and for the farmer. SNAP recipients can double up to \$50 Electronic Benefit Transaction (EBT) dollars every time that they attend a market. This means more money for farmers and more Georgians accessing nutritious, locally grown food.

Since the DVCP's inaugural year in 2009, WWG has distributed over \$800,000 in DVCP incentive dollars to SNAP recipients in Georgia to increase access to healthy and affordable food. Through the DVCP, WWG has enabled program participants to build stronger connections to healthy eating habits. In 2014, the DVCP will provide nearly \$400,000 worth of fresh, healthy food to Georgia's SNAP recipients at twenty-two participating Farmers Markets.

Janelle Bracken, Wilton Consulting, is now the senior product manager for Amazon Art (amazon.com/art) and works with software developers to release new features to improve the customer experience.

Steven Brandsdorfer, Parsippany Consulting, left Deloitte to join Innovate CV. He was offered a position at a startup company focused to innovate the resume. Steven identified with the solution, especially with all of the focus on Innovation at Deloitte. He thinks that this is one of the most unique products in the marketplace and can help standardize the resume for certain industries. The Innovate CV resume offers the following solution, which helped make him decide to take the risk and leave Deloitte to join a start up in NYC. A branded resume, ability to add video to help sell yourself, the ability to attach work samples, key skills, languages and IT skills prominently displayed on the resume. On top of the slick layout, the resume is cloud based, so it's easily accessible from anywhere and is available for live editing as opposed to remembering where the last version of the resume was stored.

It is a truly interesting space to see where their product can thrive. Innovate CV offers solutions to recruiters and professional services teams that build and work with resumes. One of Steven's true interests in the product is to see how a professional services firm can utilize this product. Imagine a web link to a resume of a professional services resource with a video that highlights his/her personality and skill set. Consulting firms can also build a team resume with testimonials and feedback from past clients that can speak highly of the organization's work. He thinks this is the future of resume creation and management. A web version where companies can brand web resumes and share it with the world. A sample Innovate CV resume can be found at

<http://test3.innovatecv.com/cv/share/599/steven.brandsdorfer@innovatecv.com>

Katherine Cunningham, Atlanta Consulting, married Josh Thomas on May 31, 2014 at the High Museum in Atlanta. They live in Atlanta and she is the director of financial planning at WellStar Health System.

Rich Di Tieri, Boston Consulting, just accepted a position at LevelUp as enterprise sales executive. He now identifies and closes opportunities with multi-location businesses primarily in the restaurant and fast casual food

industries to build custom mobile payment applications that let their customers pay with their phone in-store to earn rewards. They are the largest mobile payment network in the US with over 15,000 locations and 1.5 MM users.

He still owns Pintley, a craft beer app and community that hosts craft beer events in cities across the country and has expanded their team with a new full-time hire.

Ravi Dodani, Boston Consulting, is the owner of Shoppers Paradise Inc., an international luxury brand in bespoke custom clothing (www.ShoppersParadiseInc.com). He is also running a subsidiary (www.RaviDodani.com) that handles the production for smaller custom made to measure clothiers in the US, Europe and Australia.

Steve Dollase, Rosslyn Consulting, is president of Inmar's Supply Chain Network, a leading provider of Reverse Logistics, Recall Management and Liquidation services consumer product retailers and manufacturers, headquartered in Winston-Salem, NC. He serves on the Wharton Alumni Board and Wake Forest University MBA Advisory Board.

Libbie Fritz, Boston Consulting, is now senior manager, people operations and strategy at Medallia in Palo Alto, CA. She is also becoming a certified professional coach via the Coaches Training Institute.

Brian Goebel, Atlanta Consulting, has recently joined Emory University's Social Enterprise Center as program director of ViCap:Start. The 14-week accelerator program provides promising micro-entrepreneurs within marginalized communities the business tools, network access and early-stage financing needed to develop sustainable businesses that not only support entrepreneurs and their families, but also build neighborhood vitality. Brian also serves as an Associate Partner for a boutique nonprofit consulting firm specializing in evaluation, strategic planned and organizational development. ViCap:Start is actively seeking business professionals to serve as mentors to micro-entrepreneurs in the Atlanta area.

Nicole Green, Denver Consulting, has been named as first Division Administrator for the newly-created Division III for Team Rubicon, a disaster relief organization which unites the skills of military veterans with first responders. This division encompasses most of the western United States. A graduate of the U.S. Air Force Academy and former intelligence officer, Green was most recently Team Rubicon's Director of Division Administration. In her new role, she will develop and execute strategy at the divisional level and provide significant input to national strategy that reflects the needs of the regions. Team Rubicon was founded in the wake of the 2010 Haiti Earthquake by Marine veterans Jake Wood and William McNulty. It now has more than 60 operations under its belt, including Haiti, Superstorm Sandy and Typhoon Haiyan in the Philippines. Beyond disaster relief, Team Rubicon helps veterans find a renewed sense of purpose - vital as many return to civilian life after more than a decade of war. To learn more about Team Rubicon's mission, visit www.teamrubiconusa.org.

Nicholas Greif, Boston Consulting, after leaving the firm set off on a four-month backpacking trip through Southeast Asia exploring Thailand, Laos, Vietnam, Cambodia, and Malaysia. Highlights of the trip were bioluminescent ocean in Koh Rong, free climbing limestone karsts over the water in Cat Ba, sipping Beerlao (S.E. Asia's best beer) along the Mekong in Luang Prabang, and scuba diving in Koh Tao. The pictures of the trip can be found at <https://www.flickr.com/photos/104774369@N03/>.

After returning to his hometown of Los Angeles, Nicholas joined newly-elected Los Angeles Mayor Eric Garcetti's team and has been working for the city's four million residents since January. He has worked on various economic policies including: business tax reform, wage policy, supporting the aerospace industry by applying for and receiving a federal designation, generating more accurate employment information, and bringing more biomedical incubators and investment to the region. He also ran for and was elected to the local neighborhood council and spends his weekends playing football on the beach and watching with dread as slowly but surely all of his hotel/airline statuses trickle away.

Gabriela Guzman, New York Consulting, has transitioned to work in digital marketing. She's a social media expert, helping brands develop their digital voice through relevant content and conversations. After eight unforgettable years in New York, she has moved to Miami where she is enjoying year-round sunny weather and raising her four-year old son, Matias, with the help of grandparents nearby.

Frederick Hogan, Atlanta Consulting, was married in 2011 and moved back to GA from MO. He has also made several career advancements. He has worked in various industries such as non-profit, payments and banking. To

further advance my career in project/financial management, he served as a board member of PMI's Consulting Community of Practice as finance leader from 2008 through 2012.

In addition to having his PMP, he obtained his PMI-ACP credential in 2012 after years of working with agile programs/projects software implementations. He is currently working at SunTrust Bank as vice president-team lead within the Technology Risk and Compliance overseeing a staff who manages IT Security projects.

Peter Kennedy, Boston Consulting, Charles Thomas and Charles Perrottet, all previously senior practitioners in the Boston office of Deloitte Consulting, recently celebrated their 12th year working together as the Futures Strategy Group (FSG) (<http://www.FuturesStrategyGroup.com>). FSG helps companies and government organizations facing threats and challenges from external market and operating conditions through innovative tools like scenario planning. FSG has partnered with Deloitte in several federal engagements and looks forward to ongoing collaboration in the federal strategy space and elsewhere. As FSG principal Peter Kennedy puts it, "We learned a lot from our collective time at Deloitte and we remain in close touch with many former colleagues, both professionally and personally."

Jan A. Lommele, Hartford Consulting, made the summit of Mt. Kilimanjaro with his son-in-law on July 25. There were 16 porters, 2 guides, a cook, and a driver who supported them. He and his wife Kathy, are expecting their first two grandchildren this year; one in October and the other in December. He would like to add to the prior message that when he gave his Deloitte retired card to the guide, he knew the Deloitte name. He had guided a group of Deloitte colleagues who went to the summit of Mt. Kilimanjaro for charity.

David McCoy, Atlanta Consulting, is currently the managing vice president and Fellow Emeritus at Gartner, Inc. For the past five years, he has written a humor column, Pecan Pie for the Mind, that runs in two newspapers. The column is an examination of life through the eyes of a southern man. The column has done well, winning first place (a Joe Parham trophy) at the Georgia Press Association annual awards in 2010, 2011 and 2013. This year it won second place. The weekly column has been well-received by the readers who can see themselves (or their husbands) blundering through their interactions with clothes dryers, fine china, or social graces.

Susanne Miller-Urban, Alexandria Consulting, now works as a Lean Six Sigma Master Black Belt for Defense Logistics Agency (DLA). She and her husband John have ten children, including two-year old twins.

Guy Mills, Atlanta Consulting, was named among the 'Top 100 Under 50 Diverse Executive & Emerging Leaders' by Diversity MBA Magazine. Guy and his fellow honorees will be featured in the Fall 2014 issue of Diversity MBA Magazine and will be honored at the magazine's September Awards Gala in Chicago. More information can be found at <http://diversitymbamagazine.com/diversity-mba-magazine-names-2014-top-100-50-diverse-executive-emerging-leaders>.

Chadrick Minnifield, Rosslyn Consulting, continued consulting through September 2012 and subsequently accepted a federal appointment with the United States Department of Labor in Washington, D.C. In order to enhance his professional accounting and business epistemology, he obtained four professional certifications in 2012, which include: (a) Certified Fraud Examiner (CFE), (b) Certified Defense Financial Manager (CDFM), (c) Certification in Risk Management Assurance (CRMA), and (d) Certified Internal Controls Auditor.

Chadrick also completed his MBA with a concentration in Acquisitions from Strayer University in the summer of 2012. Aspiring to achieve more, he enrolled in the School of Advanced Studies at the University of Phoenix in the fall of 2012. He is currently pursuing Doctoral of Management in Organizational Leadership, with an expected graduation of March 2017. Currently he is preparing to attend his Year 2 residency in Nashville, TN, where he will get the opportunity interact with my cohort, engage in scholarly pedagogy, and network with junior and senior residency doctoral learners. He further adds "During my tenure with Deloitte I learned invaluable lessons, such as the importance of professionalism, personal branding, and networking, all qualities that have contributed to my continuous professional, academic, and personal success. I want to wish Deloitte and all the alumni the very best in all professional endeavors."

James Morales, Miami Consulting, has received his CFA Charter and just became part of the inaugural class of Certified Financial Planning & Analysis Professionals (FP&A). He is starting as FP&A Manager at US Gas & Electric in Miramar, FL.

George Mwangi, Rosslyn Consulting, recently joined Blackboard Inc. in Washington, DC as the director of management reporting. He will be leading the financial data integration efforts to ensure accurate management reporting and streamline the budgeting and forecasting process.

Gerald Pulvermacher, Summit Consulting, continues to be extremely active in the consulting market. Driven by demographics, a significant portion of Gerry's consulting is focused on succession planning and implementation in both family-owned and public companies. Much of his work is focused in the real estate, oil & gas and professional services sectors.

Gerry sits on several Hospital Boards and spends as much time as possible with family, particularly his five grandchildren. He can also be found cycling, golfing, practicing yoga and leisure travel. He calls Boca Raton, FL home. He can be reached via his website: www.gpulvermacherassociates.com where he has also posted numerous of his articles and case studies regarding the application of business psychology.

John R Rueckel, New York Consulting, having retired from IBM as an executive consultant, he has spent nine years operating a job seeker support ministry at St. Matthew Catholic Church in Charlotte, NC as a volunteer facilitator/counselor. He provides both group and personal guidance including recommendations for self-marketing, resume editing, networking and interviewing tips, career strategies, etc. He helps them by sharing his personal job-seeking experience during his work career that proved successful hiring manager experience.

On a personal front, he has been married for 55 years to high school sweetheart. They have five children, nine grandchildren and one great granddaughter. They now reside in South Charlotte, NC from Greater NY-Northern NJ. He has backpacked the BSA High Adventure Philmont NM Rocky Mountains three times; latest in 2012. He has regular ongoing outdoor activities which included walking six miles thrice a week, gym thrice a week, and golf 2-3 times monthly.

Ben Schenck, Boston Consulting, left the firm to embark on an entrepreneurial opportunity. He now runs a podcast on iTunes called MTNmeister which presents interviews with inspiring figures in outdoor sports: mountaineers, rock climbers, ultra-marathoners, skiers, and his personal favorite, polar explorers. He is a huge podcast fan so it wasn't completely random. Ben feels that everyone should listen to podcasts. There's something out there for everyone, and it's a perfect way to occupy the time it takes to get from point A to point B (or the time it takes to run in place on a treadmill for a half hour).

The point of MTNmeister is to parallel the lives of extreme athletes to our lives. Topics like persevering through hardship, goal setting, and decision making come up in every episode. It's a really inspirational, motivating half hour which is perfect for both outdoors and non-outdoors enthusiasts. It has even inspired him to run the NYC marathon which he will be running in November.

Steve Mesler, gold medal bobsledder for the U.S., often speaks at Deloitte University, and Ben was lucky enough to see him at the new-hire training. When Ben started the podcast, he sent a note to see if Steve wanted to join us as a guest. They booked Steve for episode #41 and had a great conversation.

Arindam Sengupta, Hermitage Consulting, is associated with Tech Mahindra – A IT, service provider for Telecom Solutions. He has experienced fast learning there which helped him in acquiring in depth knowledge and experience in building best solutions. He is honored to receive accolades for consistent performance and innovations that resulted in big revenue benefit to my company. He received the 'ACE' award last March which is meant to appreciate excellence in supporting client in sailing through difficult patches soon after launch a merged application to serve mobile and fixed line services. He received a promotion last year and his new position is Solution Architect.

Apart from technical growth solutions, he has learnt three key things that really add value: investment in relationships; enjoyable communications; delivering quality and simplicity.

David Sison, New York Consulting, was recently hired as SVP and chief information officer at Mitsui Sumitomo Insurance Group, for their US Operations. In this role, he is responsible for helping the business craft their strategic plans, developing the supporting technology visions and transforming the IT organization into an agile solution provider. Mitsui Sumitomo, the parent company in Tokyo, is the world's seventh largest P&C insurance company.

Glenn Small, Rosslyn Consulting, has joined Navigator Management Partners as a client services director serving the Baltimore/Washington market. His clients include state, local and higher education.

Max Sutherland, Atlanta Consulting, has accepted the position of president and CEO of Antilles Seaplanes, manufacturer of the iconic amphibious Grumman Goose. They are currently in the capital raising phase to restart production. Interested investors can contact him.

Rene Torres, San Juan Consulting, supposedly retired in 2008. He says supposedly, because a lot of his clients have not left him alone. So he still does some assignments. After leaving the firm, he went to the Harvard Business School, and later obtained a PhD in Business Administration. His main assignments have been real estate appraisals, feasibility studies, and business valuations. He has specialized in international commercial real estate ventures, such as resort developments, yacht clubs, marinas, golf courses, hotels, restaurants, etc. This has mostly been undertaken in Central America, South America, and the Caribbean.

After retiring, he moved to Ecuador and lived there for five years, travelling around a lot of the world enjoying his retirement. But he had to go through Panama to really get anywhere, and enjoyed the bustling city life in Panama City, and the nice beaches and warm weather. He made the decision to move there permanently, which he did a few weeks ago.

Bradley Willet, Rosslyn Consulting, continues to support US Special Operations Command (USSOCOM) Training and Development here in the National Capitol Region. He has recently taken on the role of project manager for the SOF Targeting Training Element (STTE). It has been extremely rewarding to continue to support SOF teams develop their craft in the tactical and emerging technical realm.

Brad and his wife, Katie, welcomed their first child. Their son, Rhys Declan, came into the world on May 18 weighing 6.14lbs and was 21.5" long. He continues to inspire and amaze his parents every day. Fatherhood is a true joy for them. Katie and Brad will celebrate their one year anniversary on August 10.

Matthew Wininger, Hartford Consulting, is Assistant Vice President and lead audit actuary at MassMutual Financial Group. He is responsible for designing, leading, and delivering risk-based actuarial audits for all actuarial functions in the enterprise, primarily focused on MassMutual's insurance subsidiaries. Prior to joining MassMutual, he served as valuation actuary and controller at The Hartford's institutional and fixed annuities. His practice areas include GAAP and statutory accounting, annuity valuation and auditing, reinsurance transactions, asset-liability management, and expense analytics.

Alison Coleman Rezai, San Francisco Consulting, has decided to leave her role as global marketing strategy & planning team at Hewlett-Packard after five years to join Visa as vice president of technology and innovation marketing. In this new role, she is responsible for supporting Visa's innovation agenda and B2B focus. This has been a big year in the Rezai family. They added a little girl named Paige Victoria Rezai to the family in February 2014. She joins her big brother, Ben, who is two and half years old.

Lou Farah, Seattle Consulting, married Natasha Farah in Seattle, and welcomed their first baby boy James Anthony Philip.

Chris Heuer, San Francisco Consulting, has recently launched a new software company Alynd, which provides a system of accountability for client and project team collaboration. While working with dozens of companies in multiple industries during his time at Deloitte Consulting, he realized that the biggest challenge facing organizations of all sizes was when people didn't do what they said they were going to do. This inspired him to research the root cause of this costly problem, looking to academia, the experience of colleagues and primary research on dozens of collaboration solutions. As one of the leaders working on Deloitte's global Yammer rollout, he also leveraged his direct experience with social software to develop a holistic solution that connected collaboration, productivity and performance management. The result, an innovative software as a service called Alynd, designed to improve clarity amongst collaborators, to enable knowledge workers to track their commitment to each other and to provide recognition for results delivered. According to Chris, his Deloitte experience was invaluable in the conceptual and tactical development of the software. "I was impressed with how much time the firm invested in the development of talent, especially in regards to the consensus review process and coaching. Everyone knows how important it is to make long term professional development plans, and how much more important it is to pause to review where we stand against those plans and how we should adjust our path. But doing it every six months meant I had to invest almost a full week to review what I had done previously and get it entered. So I really wanted to create a real time

performance management system that would capture the reviews and feedback in real time. So with Alynd, whenever you deliver on a commitment to a team member, you get that feedback right away resulting in a digital reputation we call the Net Trust Score." He hopes the Net Trust Score will not only be used in determining bonuses and identifying expertise inside organizations, but that ultimately it will become a major factor in the recruitment and hiring process.

Under development for over a year with the support of several industry leaders, analysts and authors, Alynd is in the midst of launching alpha pilots with dozens of managers from inside Fortune 500 companies and leading professional service firms. They are entering the market with a focus on marketing teams and their agencies, but the solution is equally valuable for any group inside any size organization, especially a distributed team that is struggling to meet deadlines and build trust. From conversations with the CMO's of Adobe and Cisco, he has learned that they each credit the success of their teams with instilling greater accountability in their culture and are both embracing lessons learned from applying agile methodology. While Alynd is just entering the market, Chris is hopeful that he will soon be recognized as one of the Deloitte Fast 500.

Paul Pacun, Santa Ana Consulting, has been running an enterprise app company for the last four years. The company is best known by the product, Vablet - a sales enablement tool used globally by life science, financial services and manufacturing companies. It is integrated with Salesforce, Box, Google and most ERP platforms running SaaS or on-prem, iOS or Windows 8.

Anthony Patterson, Seattle Consulting, has joined Revel Consulting, a local management consultancy in Seattle in October as a senior associate. He is currently serving as a project manager within Marketing IT and advice on the Nokia acquisition. He has recently completed his first year (of three) at UCLA Anderson's MBA program. He is pursuing his MBA part-time and flies down for classes once a month. He still remains in close contact with many other Deloitte colleagues and alumni.

David Rosenblum, Los Angeles Consulting, recently joined the board of Hanmi Financial Corporation. He is also president of the National Association of Corporate Directors Southern California Chapter.

Andrew Schmerl, Los Angeles Consulting, has joined Robert Half Management Resources in Orange County, CA as an audit, risk & business consultant.

Gregory S. Staszko, San Jose Consulting, after retirement has become the head boys and girls JV Golf Coach at Valley Christian High School in San Jose. In September of 2012, he became the Assistant Women's Golf Coach at Santa Clara University. His background in organizational leadership allows Staszko to serve on the board of directors for Catholic Charities of Santa Clara County, Special Olympics of Northern California/Nevada, Silver Creek Valley Country Club in San Jose, and Minnesota State University Moorhead Alumni Foundation. Staszko and his wife Gail are longtime residents of San Jose, CA. They have a daughter, Lindsey, who graduated from The University of Arizona and works at Deloitte in San Jose. They have a son David, who graduated from California State University Monterey Bay and works at Lockheed Martin Space Systems in Sunnyvale, CA.

Zaine van der Bank, Seattle Consulting, moved to Australia and not long after, boomeranged back to the U.S. for a year pursuing a few personal interests, a sabbatical and exploring a few entrepreneurial ventures. He recently found his way back to the Deloitte family via the UK practice in June 2014. He is now a manager in TS&A, living and working in London. He has already reconnected with some of the old colleagues, PPDs as well as the EA and DC communities of practice. His wife and kids are doing great. The boys are four and eight years old and keep them outdoors all the time, even in the rain. He hopes to catch some more Steelhead, fly-fishing in beautiful Oregon, Washington and California when he visits the U.S. next time.

Keyi Wang, Orange County Consulting, has just published a PL/SQL REST Data Service Framework. This framework offers a unique database approach to creating REST Web Service APIs, and a light-weight solution to serve JSON data directly from Oracle databases.

Compared to the conventional Java and other mid-tier based REST frameworks, this framework simplifies the application architecture and cuts the development time. From a small but full scale RESTful application project using a primitive version of this framework, it is estimated that this framework has saved about 50% of the development time on the back end. The typical applications of this framework include the backend of the RESTful application and the REST APIs for intra or inter enterprise data integration or exchange. As REST is becoming the dominating application architecture in place of J2EE, and the JSON-based REST APIs is increasingly replacing the XML-based

SOAP APIs in enterprise data services, this framework is worthy of the consideration of current, as well as former, Deloitte consultants. For people who are interested in more details, please visit www.backlogic.net.

FAS

E. Gregg Jackson, Denver FAS, has held various senior level financial management positions for the last 25 years primarily in the Denver area. He has served as the chief executive officer of a privately held real estate investment trust headquartered in Denver. He has been married to Patricia for the past 37 years and has two children, Christopher Jackson and Caitlin Jackson (Hall). In late June 2014, he became a first time grandfather when his daughter Caitlin gave birth to a baby girl. In his late 60s, he continues to work full time and divides his time between a horse property in Sedalia, CO and his vacation home in Grand Lake, CO. He is a member of the Grand Lake Yacht Club and the Pinehurst Country Club.

Shujah Qadir, Los Angeles FAS, married Jennifer Tromba on July 24, 2014 in New York City. Their wedding celebrations will continue in Dubai in November later this year. Shujah and Jennifer work and live in Dubai. She is a registered nurse with the newly opened Cleveland Clinic in Abu Dhabi. He has recently opened a restaurant by the name of Sheikh & Shake. The restaurant serves gourmet burgers, Italian pizzas, hot dogs, milkshakes & more. He is planning to open two more restaurants in Dubai this year.

Services

Kare Anderson, San Jose Services, Here's some news from me: "Becoming More Human" at first ever #TEDatIBM. You could be an apt 2015 speaker, methinks <http://linkis.com/www.ibm.com/social-b/5WMB2>
<http://www.ibm.com/social-business/us/en/ted/>

Andrea Caldwell, Philadelphia Services, will be starting a PhD program in Organizational Behavior at the University of Texas at Austin this fall. She will be relocating to Austin, TX and leaving her position in a leadership development program at DuPont as part of this new career path.

Amanda Esposito Chismar, New York Services, is very thankful to Deloitte and her colleagues for the first five years of her professional career. She gained much experience during that time and learned from some wonderful role models. Since leaving Deloitte, she has been through a few transitions! She has moved back to her hometown of Northern Virginia to be closer to family, which was the driving force behind her decision to leave Deloitte. Shortly afterward, she began dating the most amazing man, got engaged to him a year later and got married just five short months after they got engaged! During this time, she began participating in CrossFit, and fell in love with the whole idea behind the fitness revolution. She and her husband recently opened their very own CrossFit gym in Sterling, VA (near Dulles Airport)! Being a business owner is both wonderful and challenging all at the same time! Through CrossFit Sterling, she plans to continue her career in corporate fitness and health promotion that she began at Deloitte, just from a slightly different, self-employed angle. They can be found at www.crossfitsterling.com. She and her husband will soon be first-time home buyers in the Ashburn, VA area, and plan to start a family in the next couple of years.

She further adds, "If you find yourself in the area, please do stop by for a great workout and to connect with fellow Deloitte alumni! Although I sometimes miss the craziness of New York City, I am so grateful for planting my roots in Northern Virginia!"

Natalie Dickter, Washington, DC Services, has joined PwC as US & Global Data and Analytics Marketing Director. She remains in Washington.

Thomas M. Heuer, Columbus Services, is currently the Richard A. Forsythe Professor of Entrepreneurship at the Farmer School of Business, Miami University. Prior to joining MU, Tom served as senior vice president and managing director for corporate strategy and innovation at Fifth Third Bank. In addition to his responsibilities at Miami University, Thomas manages an active strategy and leadership consulting practice. His book, There is No Box, can be purchased at Amazon.

Tina M Jones, Irving Services, is working for Dallas Market Center (DMC) in the IT Department which includes the Dallas World Trade Center, the Trade Mart and Market Hall, where every year more than 75,000 buyers visit and place orders with their exhibitors. These loyal buyers come from all 50 states and more than 85 countries. These buyers represent small specialty stores and major retailers. DMC supports these buyers by showcasing the most

complete and highest quality exhibitors from start-ups to legendary names. They inspire the art of commerce.
<http://dallasmarketcenter.com/>

Kenneth Kirshenbaum, New York Services, and Wendy Kirshenbaum welcomed their sixth and seventh grandchildren, Ellery Finn and Luke Hargraves. The parents and children are doing well.

Marie Joël Landrau, San Juan Services, is currently working as a sales and marketing senior manager for the Puerto Rico Convention Center Managed by SMG World. She has been here for the past 10 years and loves it. She has been married for the last 10 years to Marcel Pérez but has no children. She also adds "My years in Deloitte under the mentorship of Manuel Garrido who was the managing partner, he shaped the professional I am today, and I am very thankful for that."

Kevin Mack, Chicago Services, has recently accepted a new job at UC Berkeley in the budget office as an FP&A Outreach Portfolio Budget Officer. After leaving Deloitte, he completed his MBA in financial analysis and management at DePaul while working as a graduate assistant. Upon completion in 2010, Kevin's passion for higher education was fully realized when he joined Huron Consulting, a Chicago-based consulting firm that specializes in this area.

Working for Huron, Kevin focused on financial consulting across numerous higher education clients. He worked on improving budget processes, implementing budget models, chart of accounts redesign, benchmarking academic & administrative units, metrics and systems implementations (Oracle Peoplesoft).

After three and half years at Huron, Kevin left to accept the position at the University of California-Berkeley. Working in the central budget office, Kevin's role includes financial planning and analysis across the university. His role also includes partnering with schools and auxiliaries to work on budget process, allocations, planning, metrics, chart of accounts and other financial needs. Ultimately driven by his passion in higher education, Kevin is looking forward to this next chapter!

Keith Martin, Dallas Services, left the firm to be chief financial officer of Sowell & Co in 1981, a diversified investment company which has been in business since 1974. Sowell & Co has invested in land development, office buildings, mini warehouses, producing oil & gas properties, the purchase and sale of various businesses such as golf courses, printing company, industrial gas business, sergeants and pet care products. He married Judy Laughlin in 1996 and has five kids. They enjoy skiing, golf, and bird hunting

James McIntyre, New York Services, has spent two years, within the Marsh franchise as a managing director in their Strategic Advisory Group, completing his engagement in 2013.

He is starting his own firm, Opus Markets Group, with a formal launch in the fall of 2014. They will be focusing on the global insurance marketplace, Property & Casualty, Life & Retirement, and Healthcare segments. They are looking to deliver a world class cloud based services driven technology platform that will be leveraged to deploy specific offerings in the following areas: revenue growth, operational excellence, risk & capital management, service excellence and talent. Building an Insurance Network Alliance of world class partners that are interested in one or more of the above issues and can bring relevant industry, process or technology expertise to the table as their investment in establishing an annuity based relationship with specific clients.

Greg Moore, Rosslyn Services, is participating in the Over the Edge for Special Olympics Hawaii 2014 and will be fundraising for Special Olympics Hawaii. He would like to ask to support the cause and make a donation to his fundraising page: [Greg Moore's Page](#). All donations are secure and sent directly to Special Olympics Hawaii by FirstGiving, who will email a printable record of the donation.

Catherine Morgan, Chicago Services, recently published an eBook for professionals in career transition or career confusion. It is titled Re-Launch You: Discovering Your Point B and Embracing Possibility. The reviews have been amazing. More information is available at <http://pointatpointbtransitions.com/re-launch-you-book/>.

Christie (Cruz) Samson, San Francisco Services, graduated with her Master's degree in Organization Development from Pepperdine University's Graziadio School of Business and got married in March 2014 to her husband Brian (a loyal Chicago Cubs fan). They married in Oahu's North Shore and went for their honeymoon to Australia this spring. Christie currently is director at GAN NorCal (Pepperdine University's Graziadio School of

Business network), and leads national recruiting programs and events at Silicon Valley based SolarCity. She is thankful for the career growth and experiences she had at Deloitte, and on occasion runs into former Deloitte colleagues at various airports. She'd love to stay in touch with former colleagues.

Kirby Warnock, Dallas Services, directed a documentary, *When Dallas Rocked*, which aired on Dallas-Fort Worth PBS station KERA on August 12. The film, which has already had several sold-out screenings in Texas, takes a look back at Dallas' forgotten music history, one that was larger than Austin's in the 1970s, but has now faded with the decline of vinyl records, dominant AOR FM radio and a diminished live music scene. However, from the 1950s through the 1970s, Dallas was the music capital of the entire southwest as evidenced in Warnock's film. Besides rare, never-before-seen backstage photos of the B-52s, Stevie Ray Vaughan, Jimmy Buffet, and Bono of U2, the film includes interviews with Jimmie Vaughan, actor Stephen Tobolowsky, and other Dallas music luminaries of the era.

Details on the film and the PBS telecast are available on the film's web site at: <http://www.trans-pecosproductions.com/>. Dallas area alums may recall Warnock's work in the first and only Deloitte Film Festival.

Warren Wirth, Los Angeles Services, is married to Elvi Wirth, who is a Director at SAB Miller, works for the CEO, and their son, Joshua, who is 11 years old and he is the national strategic alliances director at Ultimate Software.

Tax

Martin H. Abo, Jericho Tax, and Joseph P. Cipolla, Jr. are now co-managing members of Abo Cipolla Financial Forensics, LLC. This merged services division will be an affiliate to their two separate core accounting firms, exclusively providing expert witness testimony on financial matters, and other litigation support services as well as business valuations.

The judicial, legal and insurance communities and their clients often require (demand) a full range of dispute resolution, valuation, and forensic services. To meet the many needs of the clients, they have added Abo Cipolla Financial Forensics to our existing practices. It is for this reason that logic demanded an alliance with a strong associate. Cipolla & Co., LLC, successful in their own right, shares Abo and Company's commitment to high ethical standards. Together they form a much larger organization with increased depth, additional skilled staff, and an extremely expanded range of expertise that complements both the firms with a strong presence in Southern New Jersey, Northern New Jersey, New York and Pennsylvania.

Moria Bernstein, Chicago Tax, is an attorney at the Law Offices of Moria Bernstein focusing on family and residential real estate law. She has been named a leading lawyer with the *Chicago Daily Law Bulletin* for the years 2011-2014 and named a '40 under 40' Illinois Lawyer to watch. She is married and living in the Chicago area with her two-year old twins.

Phil Brady, Miami Tax, is a senior managing director in the Real Estate Advisory Group of FTI Consulting in New York, NY. His son, Philip recently completed his audit internship at Deloitte in NY and has accepted a permanent offer to join the AERS Group. Phil lives in Cooper City, FL with his wife, Robin, and children Philip and Kellie.

David W. Faris, Los Angeles Tax, is writing books on sports and a novel after his retirement. These are available on Amazon. He went back to school at Cal State San Bernardino and earned another BA in English Literature. He is currently working on two more books.

Gillian Grant, Washington, DC TAX, has taken her experience at Deloitte to Merry! Brown Events (MBE) where she was recently named director of operations. MBE is one of the premiere planners for weddings, social and non-profit events in Southern California. MBE is in the process of rolling out a new destination management service for corporate clients to facilitate meetings and events in Santa Barbara, CA. Her current project is running Dream Foundation's 20th Anniversary Gala. This organization provides end of life wishes to adults with terminal cancer. This event helps raise over \$500,000 that goes directly to granting wishes to Dreamers. Additionally, she has joined the board of Viva el Arte, an organization providing access to arts and music to the Hispanic community in the area. Between this and surfing a lot, she doesn't have a lot of free time!

Kathi Hanley, Dayton Tax, is now retired and living in Tucson, AZ. She was in the private practice of law in Worthington, OH for over two decades and is now of Counsel to the law firm of Arenstein & Andersen Co. LPA.

Kathleen has been busy doing triathlons, duathlons & marathons, having traveled all over the world representing Team USA. She recently placed in the Top 10 in her age group (60-64) at the World Duathlon championships in Pontevedra, Spain on June 2, 2014.

Craig Michael Heinen, Minneapolis Tax, moved to Charlotte, NC to pursue his passion in motor sports. He spent six months working as a metrics supervisor for NASCAR racer Alex Bowman. It was quite a thrill for him to be a part of something he loved so much! He spent a year in Charlotte before returning to Minneapolis where he now works part-time as a business consultant for various companies. This role allows him to spend more time on his farm where he now has started to gain some respect in the horse-breeding world.

It's coming up on a year since he married his high school sweetheart, Constance, after being together for over 10 years. They were thrilled to tie the knot and then spend the year together in Charlotte. Craig couldn't be more thankful that Constance has supported him every step of the way!

For the past six months, Craig has been training to become the first Minnesotan to swim the entire Mississippi River. Others that have attempted it shared with Craig that they wished they had spent more time training. Craig wants to make sure he is in top shape before embarking on this next adventure.

Chris Inglese, Washington, DC Tax, transferred his 30-year old tax accounting and return preparation practice to Lighthouse Tax and Business Consulting, a newly formed affiliate of Lighthouse Wealth Management, a financial planning and registered investment advisory firm headquartered in New Market, MD with over \$300,000,000 of assets under advisement. This new business model coordinates a client's tax, financial and estate planning needs under one roof. Chris will act as a referral source and consultant to Lighthouse Tax and Business Consulting, while continuing its own professional accounting and tax consulting practice.

Chris has also written a book entitled *Tax Strategies for the One-Person Business* and has obtained the *Tax Checkup* service mark in the state of Virginia. During a *Tax Checkup*, a proprietary tax planning checklist from the book is used to uncover tax-saving ideas and refund opportunities. More information about the *Tax Checkup* and a copy of the book can be obtained via the website www.scorporation.com.

Michael Iselin, Chicago Tax, has recently completed his PhD in Accounting from The Ohio State University. After several interviews with top academic institutions, Michael accepted a position as an Assistant Professor of Accounting at the Carlson School of Management at the University of Minnesota. Michael, his wife Jessica, and two children, Becca and Grant, now live in Eden Prairie, MN.

Kelley C. Long, Cincinnati Tax, has recently assumed the position of President of the Professional Women's Club of Chicago (PWCC) for the 2014-2015 year. The PWCC is Chicago's premier networking organization for professional women. Their mission is to create opportunities for Chicago area professional women to make connections that inspire personal and professional growth, support business and personal goals, and enrich lives. The membership is comprised of successful female corporate executives, junior and senior professionals, business owners, entrepreneurs, self-employed professionals, artists and prominent individuals in their industries, businesses and communities.

This year, the monthly luncheons feature keynote speakers at the C-suite level across several industries, including Pampered Chef founder Doris Christopher; ComEd CEO, Anne Pramaggiore; and Bright Pink founder, Lindsay Avner. As President, Kelley leads the 20-member board of directors in serving their 300+ members. Professionally, Kelley is the director of marketing for CPA firm Shepard Schwartz & Harris and serves on the AICPA's Financial Literacy Commission as a media ambassador and spokesperson for Feed the Pig and 360 Degrees of Financial Literacy.

Bill Mahan, Los Angeles Tax, is sorry to report the passing of two Haskins & Sells Alumni. William Steven Kreisler, Los Angeles Office, Audit, joined June 1964, passed away July 26, 2014 at home in Costa Mesa, CA. Steve had a successful career at Haskins & Sells, leaving for a financial position at Kaufman & Broad Homes, and subsequently as CFO of Warmington Homes until his retirement. He is survived by his wife Carol, daughters Katie and Kelly, their husbands and one grandchild.

Dennis Baird Schmucker, Los Angeles Office, Audit, joined June 1964, passed away March 12, 2014 in San Diego CA. Dennis worked with financial institutions upon leaving Haskins & Sells and spent the last 35+ years of his career working as a liquidator for the US Courts. His largest challenge and ultimate success was the liquidation of US

Financial in San Diego, a multi-year project. In later years Dennis split his time between his homes in Steamboat Springs, CO and Mission Bay, CA. Dennis is survived by his daughters Kristy, Devon and Whitney and by now, two grandchildren.

Brad Migdal, Chicago Tax, has been selected by Area Development, a leading magazine covering corporate site selection and relocation to serve on its 2014 editorial advisory board. Bradley is the executive managing director at Transwestern. Further information can be found at <http://www.rejournals.com/2014/07/24/bradley-migdal-named-to-editorial-advisory-board-of-area-development-magazine/#sthash.o0Q275ns.dpuf>.

George Papadopoulos, Detroit Tax, was chosen as a panelist in Wall Street Journal's Experts in Wealth Management. Blog entries appear at <http://blogs.wsj.com/experts/tag/george-papadopoulos/>.

Bill Pieper, Honolulu Tax, has retired from public accounting and is enjoying time with his six grandchildren. He is considering organizing a reunion for the 1974-1980 Touche Ross & Co. Honolulu office.

Jeffrey M. Siegel, Stamford Tax, has been named vice president of legal affairs at United Bank. Rockville Bank of Glastonbury, CT and United Bank of West Springfield, MA merged on May 1, creating a banking company with \$5 billion in total assets and more than 50 offices from West Springfield to Worcester to Central Connecticut.

H. Paul Simon, New Orleans Tax, enrolled in the Tulane Law School in 1945. He passed the Louisiana bar examination and Louisiana CPA examination in 1947. Paul became the eleventh person in Louisiana history to be both an attorney and a CPA. He became a partner in Deutsch, Kerrigan & Stiles (the largest law firm in New Orleans) in 1957 and left that firm in 1979. He was the senior founding partner in the law firm of Simon, Peragine, Smith & Redfearn (www.spsr-law.com) in New Orleans in 1979. He also represented legally in Louisiana for five out of the then 'big eight' CPA firms.

Mark J Smith, Denver Tax, has been recognized by Barron's every year since 2007. He was ranked the Top Independent Investment Advisor in Colorado by Barron's in its February 2013 list of non-brokerage firm advisors. Barron's named him one of the Best Colorado Financial Advisors for 2014, a list of the top one percent of advisors in the state, based on assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. He was also named one of the Top 400 Financial Advisors in the U.S. for 2013 and 2014 by the Financial Times based on assets under management, asset growth, years of experience, industry certification, FINRA compliance record and online accessibility.

Mark founded M.J. Smith and Associates, an independent Denver wealth management firm, in 1983. He is a CERTIFIED FINANCIAL PLANNER™ practitioner, a Personal Financial Specialist, a Certified Investment Management Analyst, and a Certified Public Accountant.

M.J. Smith and Associates has been named a Premier Advisor of Colorado for the years 2010-2013 by the nonprofit National Association of Board Certified Advisory Practices (NABCAP), recognizing licensed financial advisors in good standing with regulatory bodies and in compliance with their respective broker/dealer. For more information, please visit www.mj-smith.com. Securities offered through Raymond James Financial Services Inc., member FINRA/SIPC.

Laurence G. Thoma, New York Tax, has had several small partner relationships since her departure from Touche. However in 1993, she merged her two partner firms with another small local seven-partner firm in Red Bank NJ, Withum, Smith and Brown CPAs. At that time they numbered about 40 - 45 employees. Through internal growth and quality mergers, they have grown to a firm of about 450 employees, 37 equity partners and grossing over \$100MM. She has retired at 65 as of July 1, 2013 and is still working part time as she has a second home in the Florida Keys.

The firm has multiple offices in U.S. and is ranked as the 35th largest firm in the USA. She currently lives in Shrewsbury, NJ and commutes regularly to Marathon Key, FL. She was the director of litigation support, valuation and forensic accounting services prior to her retirement and continues to handle complex mediation matters, predominantly divorce related. She recently co-authored an article 'Mediating the Divorce of a Professional including the Valuation of a Practice' in Ronald Brown's 'Valuing Professional Practices and Licenses,' A Guide for the Matrimonial Practitioners. It was published by Wolters Kluwer Law and Business. She is also an NY attorney and had numerous other certifications as indicated above. She wishes all her alumni friends the best.

David Weinstein, New York Tax, earned his Certified Fraud Examiners designation from the ACFE.

Wendy Weintraub-Schaefer, New York Tax, and her husband, Phil, live in Weston, CT. Alyssa, their oldest child, graduated from Yale University, where she met her fiancée. Gregory, their youngest child, is a junior at Harvard University. Wendy is active in her community, and is currently co-president of the Sisterhood at The Conservative Synagogue. In addition to her private tax practice, Wendy is also a college consultant, working with students across the United States.

Events

September 2014

Upcoming Events

East

New England Alumni Reception - Save the date

Date: October 23, 2014

Time: 5:30 p.m. - 8:30 p.m.

Location: Wellesley Country Club, 300 Wellesley Avenue, Wellesley Hills, MA 02481

Parsippany Alumni CPE Program: Save the date

Date: November 06, 2014

Location: Deloitte Office - 100 Kimball Drive, Parsippany, NJ 07054

Charlotte Alumni Event - Save the date

Date: November 6, 2014

Location: TBD

Hartford Alumni Event: Save the date

Date: November 13, 2014

Location : Hartford, CT area - Location TBD

Atlanta Alumni CPE Seminar - Save the date

Date: November 13, 2014

Location: Cobb Galleria Centre, Atlanta, GA

Central

New Orleans Alumni Event

Date: October 23, 2014

Location: Metairie Country Club, New Orleans, LA

Houston Alumni Event - Save the date

Date: October 30, 2014

Location: TBD

Minneapolis Alumni & Friends Event

Date: November 6, 2014

Location: Interlachen Country Club, Eden Prairie MN

Kansas City Office Alumni event

Date: November 13, 2014

Location: Boulevard Brewing Company, Kansas City KS

Dallas Alumni Ethics Seminar and Networking Reception – save the date

Date: November 13, 2014

Location: Deloitte University, Westlake, TX

West

San Francisco Consulting Alumni Social

Date: October 23, 2014

Time: 5:00 p.m. - 7:30 p.m.

Location: Twenty Five Lusk, 25 Lusk Street, San Francisco

Invitation coming soon!

Seattle Speed Training Event - Save the date

Date: December 2, 2014

More information to come. Please make sure your contact information is up to date!

Deloitte Alumni Resources

Deloitte Alumni Resources

Join the Deloitte US LinkedIn Group for alumni inquiries, such as benefits (e.g. pension, 401K, flexible spending plans), expense (reimbursements) and payroll e.g. (W-2/W-4, taxes/deductions).

Click here to request membership*

*Must be an eligible alum to join the group.

FAQs

Click here for FAQs.

Alumni Relations Contacts

Our Alumni Relations professionals, located in each region, are well within reach. See a complete list of **Regional Alumni Relations Contacts**.