



## News about you

### Central

**Douglas Anderson, Minneapolis Audit**, accepted an assignment as interim CFO at Webster University in St. Louis, MO effective January 21, 2016. His responsibilities include financial and facility operations and he expects to serve until early June 2016, at the time a new permanent CFO is selected. His current work includes service as a city council member in Lakeville, MN; operating a home-based nutrient business; and financial, operational and leadership consulting.

**Chris Aquino, Buffalo Audit**, was featured in an article published by the Institute of Management Accountants on his career as a Certified Management Accountant (CMA) and support for the CMA certification at Niagara University.

**Robert Berchtold, Chicago Audit**, recently released the first season of *The Abacus Show*, a free podcast that helps accountants build successful and fulfilling accounting careers. It has given him a great excuse to chat with some of the smartest people in the accounting profession and share their stories.

**Charles Bradley, Cincinnati Audit**, is senior vice president, director of strategic initiatives at Fifth Third Bancorp, headquartered in Cincinnati. He leads the design, planning, and implementation of enterprise spanning transformation programs. He recently moved from corporate strategy where he was senior vice president, managing director.

**Johnie Faller, Pittsburgh Audit**, is the senior manager in the audit department of Holsinger, a regional accounting firm in the Pittsburgh area.

**Anthony Gedeller, Chicago Tax**, was promoted to global tax and currency director at Mars, Inc.

**Arica Harris, St. Louis Deloitte Advisory**, was promoted to group leader over advisory solutions operations at Edward Jones. She has the day to day responsibility for two teams in Tempe and St. Louis that support and manage the account programs.

**Billy Johnson, Dallas Services**, is the executive director of the Professional Leadership Program (PLP) at the University of North Texas (UNT). Under Billy's leadership, the vision is to grow the program by 35% annually and be able to serve more than 250 students in year 2018, from various academic disciplines, and to become a national model for student leadership programs.

He attributes his success and opportunity in higher education to his experiences at Deloitte and the professional relationships that were forged during his tenure of almost 10 years.

**Monte Johnson, Minneapolis Audit**, is the CEO of Cymbet.

**Erin Kellar, Houston Services**, is the firm wide events manager at Baker Botts law firm.

**Thomas Kieren, Chicago Services**, is performing architectural, interiors and landscape photography for a variety of companies, architects, builders and publications. His evening job is performing with his jazz-swing music sextet at corporate events, not for profits, jazz clubs, holiday parties, municipalities, alumni events, weddings, and

fundraisers in the Midwest and up and down the East Coast. In his spare time, Thomas continues his consulting practice in turnaround assessments and commercial due diligence for workout departments of banks and private equity firms.

**Thomas Kramer, Minneapolis Audit**, recently celebrated 32 years with Xcel Energy. He is hoping to work a few more years until his youngest son graduates from the University of Nebraska – Lincoln in Accounting. Thomas is enjoying life each and every day and still trying his best to become a contestant on *Survivor*.

**Chris Mansfield, Chicago Consulting**, and his wife, Laura, welcomed their second child, Elizabeth ‘Libby’ Virginia Mansfield, on September 29. They reside in Boston where Chris works for the Dana-Farber Cancer Institute.

**Kathleen McAllister, Houston Tax**, president and CEO of Transocean Partners, is shouldering the additional role of chief financial officer.

**William O’Connell, Dallas Deloitte Advisory**, was appointed to the Texas Advisory Committee for the Achieving a Better Life Experience (ABLE) Act. The Committee will advise the Texas Comptroller’s office on issues affecting the implementation, structure and program benefits of the Texas ABLE Act passed in September 2015. The ABLE Act allows certain financial incentives and protections to the families, guardians and persons with disabilities, as defined in the Act.

**Laura Pannier, Dayton Audit**, and **Skip Snow, Dayton Audit**, were 2015 Club Champions at the Dayton Country Club.

**Caterina Pryde, Chicago Services**, is sad to announce the death of her father on January 4. She entered the hospital in February for herself for clear-cell sarcoma. Her cancer has not been staged yet and it is either stage three or four.

**Lindsey Schiesser, Indianapolis Tax**, started Schiesser Tax Solutions, LLC on September 15, 2015. She is focused on partnering with individuals and small businesses as their trusted tax advisor. Entering the firm's first tax season, she has a wide array of clients and has enjoyed the flexibility of serving clients in a scalable model that fits their individual needs. The rewards of this is advancing her career and serving her clients while being more present and available for her family. She loves being her own boss, not having a commute, and serving as a trusted tax advisor to her clients. But, she recognizes she would not be in her position today if it wasn't for the experience and the support of peers, mentors, and partners at Deloitte through the years. Lindsey is a proud Deloitte alum!

**Libby Utesch, Minneapolis Tax**, is the international tax manager at St. Jude Medical. Libby was recently engaged and will be married on September 17, 2016.

**Jennifer Wallis, Pittsburgh Services**, celebrated her one year anniversary as restaurant marketing director with Chick-fil-A in Washington, PA. After spending nearly six years as a stay at home parent following her time with Deloitte, she rejoined the workforce last February. She resides in South Fayette, PA with her husband Scott, and children Ryan (six) and Leah (four).

**Sarah Winters, Chicago Tax**, is now vice president, global head of tax with Cushman & Wakefield. She joined in January 2016 to lead the recently combined companies of Cushman & Wakefield, DTZ and Cassidy Turley. She is based in Chicago.

## East

**Hayley Alexander, Washington DC Consulting**, has recently published a book titled, *Pitting the Olives Might Help*. The book illustrates the social and economic upheaval befalling Russia in the wake of the 1991 collapse of the Soviet apparatus.

**Jarlath Bloom, Rosslyn Consulting**, is working as the advisory engineer at Splunk, Inc. for the public sector.

**Walter Brasch, Parsippany Audit**, will be installed as president of NJCPA for a one-year term on June 16, 2016. This will be a true honor and privilege culminating over 30 years of volunteering at NJCPA in a number of capacities. The NJCPA has been such an integral part of his professional life since he first volunteered in the early 80s in the Monmouth/Ocean Chapter. The NJCPA has not only helped him to grow professionally in the practice of public accounting but has also been instrumental in his personal development as a leader. In addition, the society has been the engine that has been such an important driver with developing countless and long-standing relationships with fellow colleagues, other professionals and meeting so many phenomenal individuals. He owes it to many of the professionals whom he worked for at Deloitte.

He feels the message is about the importance of building long lasting relationship and giving back to your profession and community. Walter encourages all CPAs to live by the oath that they take as professionals and look for ways to give back and make investments in relationships including young CPAs to be.

**John Button, Rosslyn Deloitte Advisory**, is the managing editor of Milton Chadwick & Waters Publishing and has worked with two leading industry experts to edit their published works.

**Lorelei Cheung, Washington Consulting**, welcomed her second child last year. She now has two boys who keep her on her toes and ready for action. She currently occupies her time caring for her family, working part-time with a local company, and serving as president of Reston Useful Services Exchange.

**Ernest D'Ambrose, New York Audit**, took an active role in the sale of the Yodle to Web.Com. He is working as the chief accounting officer at Yodle.

**Henri Eliot, New York Consulting**, has been awarded Chartered Fellow of the Institute of Directors in New Zealand. A Chartered Fellow (CFInstD) has attained the highest level within the IoD's Chartered categories. Their qualifications, background, character and experience make them role models for other members, their organizations and the community as a whole.

Henri is the founder of Board Dynamics, which provides board advisory services in New Zealand and Australia. He is currently chairman Balle Bros Group, chairman Taxpayer's Simplification Panel (IRD), a non-executive director of King Tide Asset Management, Trustee Plunket Foundation and member of Propellerhead Limited Advisory Board.

**Samantha Fordyce, Wilton Consulting**, is the project manager for the one-day major giving campaign, *Give Local Solano*. This is in participation with Give Local America, a national campaign scheduled annually. Solano Community Foundation is in the San Francisco Bay Area, and is observing their twentieth anniversary this year. This is their first major giving one-day campaign.

**Gillian Grant, Washington Tax**, started her own event-related consulting and planning company, *Gillian Valentine*, at the end of 2015. Her focus is helping nonprofits streamline their development efforts and produce events that will be fun and enjoyable for their constituents i.e., no galas or black tie parties. *Gillian Valentine* has picked up clients in Los Angeles and New York which she feels is a nice change from Santa Barbara.

**Lindsay Griswold, Atlanta Audit**, is happy to announce the birth of her first born son, Fielding Mathew Griswold, born on January 7, 2016.

**Michael Hoffman, Atlanta Tax**, is celebrating an important milestone this year: Hoffman & Associates (H&A), established by him in 1991, is completing 25 years of success helping families and closely-held businesses protect and preserve their legacies. Much of this success is attributed to the way in which Mike and his team work to ensure clients understand the value of better planning, wiser management and more responsible stewardship.

**Sherrill Hudson, Miami Services**, has been named to the National Association of Corporate Directors' (NACD) 2015 Directorship 100 list, a distinguished honor which annually recognizes influential leaders in the boardroom and corporate governance community. He is the chairman of the board at TECO Energy.

**Steve Kaplan, New York Tax**, was appointed chief tax officer of Leucadia National Corporation in New York. Leucadia is a diversified holding company focused on return on investment and long-term value creation in order to maximize shareholder value. He also continues in his role as the global head of tax at Jefferies. Jefferies operates as a global full service, integrated securities and investment banking firm. Steven has now been with Jefferies for over 10 years. His daughter recently started as a freshman studying accounting at The Fisher College of Business at The Ohio State University.

**Debbie Klis, Washington Tax**, made partner on July 1, 2015 at the national law firm of Ballard Spahr LLP. She is based out of their Washington, DC office and concentrates on transactional matters involving business, securities, and tax issues.

**Karen Koedding, New York Audit**, is based in Sydney, Australia. After a career in public and private accounting, she became a professional organizer. She is Australia's first Certified Professional Organizer and the CEO of A Little Elf, a Professional Organizing firm in Sydney. She has released her latest book, *I Found an Egg on My Bed: How to Get Back in Control at Home and Work for Busy Entrepreneurs* in March 2016 and is also working on developing online training programs for entrepreneurs, and new professional organizers.

**Amy Loupin, Tampa Audit**, and her husband, Steve, started Loupin Construction, a construction company in Tampa, FL in 2010. The company specializes in construction of luxury custom homes as well as commercial construction. Loupin Construction was recently listed among the Top 25 Custom Homebuilders in the Tampa Bay area by the Tampa Bay Business Journal.

**Sehar Mahmood, Boston Consulting**, recently returned from a three-month personal travel sabbatical in Southeast Asia. During this solo trip, she visited Vietnam, Laos, Cambodia, Thailand, and Myanmar. Along the trip, she documented her adventures on a blog so that friends and family back home could read about and see photos from her trip. She also volunteered at a school in Myanmar where she helped with English language instruction to children of all ages (elementary through high school). This was a trip of a lifetime for Sehar and she made many friends from across the world and had many unforgettable adventures and challenges along the way. One of her favorite experiences was playing with, feeding and bathing elephants at an elephant jungle sanctuary in Chiang Mai, Thailand.

**Marc Mantelli, McLean Tax**, merged the tax practice of his company, Mobility Financial, into Arthur Bell, CPAs.

**Robert Misey, Nashville Tax**, authored the tenth edition of his book *Taxation of International Transactions*. The book was published by CCH.

**Zsuzsa Palotas, Philadelphia Consulting**, has made some exciting progress in their venture Boardroom Spirits. They successfully ran a Kickstarter campaign, launched their line on boardroom vodkas and opened their tasting room to the public.

**Brian Peterson, Tampa Audit**, left Deloitte as he and his wife were moving from Central Florida to South Florida to be closer to their families. They wanted to return to South Florida and start a family, where they both grew up. They purchased their first home in 2015 and are expecting their first child in summer of 2016.

Brian became a licensed CPA in November 2015 and accepted a new role working for a smaller public accounting and tax firm in Coral Springs, FL. He still proudly wears his Deloitte apparel. He stays in touch with many of his former Deloitte colleagues and speaks to them about their career choices and how Deloitte helped them reach their career goals, as well. He feels lucky to have had the opportunity to work for such a great company.

**David Preznuk, Rosslyn Consulting**, authored a book titled *The Drone Age: A Primer for Individuals and the Enterprise*. The Drone Age is for beginners and experts alike, with many anecdotes from his experiences flying drones for customers as well as from integrating them into their organization and training future drone pilots.

The experiences he gained while at Deloitte solidified his desire to write a book. This coincided with his leap into the commercial drone industry. Everything he learned at Deloitte has served him well in his latest endeavors.

**Romy Rost, New York Consulting**, is the founder of *Romy Rost Coaching*. She coaches mid- to senior-level managers to help them hone their leadership brand, develop engaged teams and be more productive, successful and fulfilled in their careers. Romy is an ICF certified coach, trained through the Coaches Training Institute. She coaches through the lens of her change management and employee engagement consulting expertise, ultimately helping create stronger, more connected workforces.

**Kurt Streams, New York Audit**, is the CFO of SITO Mobile, Ltd., a mobile ad tech company based in Jersey City, NJ. He joined SITO in November 2013, since then, they have doubled SITO's annual sales, achieved profitability and listed on NASDAQ.

**Bruce Thomas, McLean Services**, is the director of sales for A&D&S clients at IHS. He leads a team of sales professionals and analysts/consultants from IHS that work with those A&D clients globally. The projects and programs with these commercial aviation and defense titans is intellectually stimulating.

He and his wife, Betsy, are living in both McLean, VA and Holderness, NH. They became grandparents on January 1 when their son, Bruce III and his wife, Laura Long, gave birth to Elizabeth Eads Thomas.

**Brolin Walters, Rosslyn Deloitte Advisory**, was quoted on the front page of the Wall Street Journal on January 27, 2016 in an article titled, *Fees on Mutual Funds and ETFs Tumble Toward Zero*.

**Ashley White, Rosslyn Consulting**, joined the newly formed corporate strategy group at AECOM, the largest engineering design firm in the U.S. As a part of her new role, she is helping to direct the company's strategic priorities, conducting competitor intelligence, and implementing operational improvements.

**John Yerrick, McLean Audit**, visited Israel along with his wife, Mary, in October 2015 on a tour organized by the Franciscan Monastery in Washington, DC. The tour took them to Bethlehem, Jerusalem, and Tel Aviv and also included the Dead Sea, Jericho, and the Sea of Galilee. They visited such historic sites as the Church of the Nativity in Bethlehem, renewed their marriage vows in Cana and their baptismal vows at the River Jordan, swam in the Dead Sea, and sailed on the Sea of Galilee.

Their last two nights were spent in Tel Aviv and Jaffa, where they had the pleasure of having dinner one night with Ilan Birmfeld, Chairman and CEO of Deloitte Israel, and his wife Tal.

## West

**Nancy Bui-Thompson, Sacramento Consulting**, was elected as president of the Sacramento Municipal Utility District (SMUD) Board of Directors for 2016. She was elected to the board in 2008 and re-elected in 2012 to represent over 200,000 constituents across seven communities. SMUD is the country's sixth largest public utility and serves 1.4 million people in Sacramento County.

**Jay Cain, Los Angeles Audit**, married Rachel Wynne on March 26, 2016 in Dallas, TX. On the professional front, he has served as corporate counsel for the Sewell Family of Companies since August 2014.

**Srinivasa Chakravarthy, San Jose Consulting**, joined EMC in the IT Transformation group as a senior IT transformation partner. He is excited about this new role in helping their customers/clients transform their businesses.

**Alice Chu, Los Angeles Audit**, resides in Cypress, Orange County. She has now transitioned to the teaching profession and is a full time faculty professor of accounting at Golden West College, a community college located in Huntington Beach, CA. She also serves as the department chair, and in that capacity she is working to bring higher level accounting courses to her school for working individuals who are interested in getting their education in order to sit for the Uniform CPA Examination.

Alice and her husband recently welcomed a baby girl, Liana Kaylee Rivera, into their family in 2015.

**Mike Favors, Los Angeles Audit**, spent his entire career spanning 37 years as an auditor in Public Accounting. He took the foundation gained at Deloitte and built a successful local practice that conducts over 150 audits each year. On April 18 of this year, he will walk out the door for the last time as his partners are buying him out and Mike knows his clients are in great hands.

Many of the clients have predicted he will fail at retirement i.e. come back to work because he has a passion for accounting. Mike fully intends to succeed at retirement as the passion for his wife, family, golf and travel is far stronger than that for his profession. He truly believes that he never had to work a day in his life because he loved what he did for a living and thanks to Deloitte, he was pretty good at it.

**Lisa Francesca, San Jose Services**, began her role as the communications specialist for San Jose State University's Dean of Engineering. Her book, *The Wedding Officiant's Guide*, successfully launched in stores across the U.S. in 2015.

**Marilyn Gagen, Honolulu Tax**, founded a non-profit with her friend called *TotalCourage*. They provide on-site character development coaching tailored to teach, train and mentor high school and college coaches and student athletes to win with character.

The program emphasizes key traits that inspire athletes to lead a principled life. They hope to hammer home the consequences of leading a cowardly life of disrespect, immoral behavior, or criminal conduct.

**Dick Gerlach, Los Angeles Audit**, is still active in some non-profit operations in spite of being retired.

**Jen Girard, Seattle Audit**, launched her new business, *DateWise* in early 2015. It is a step-by-step, online interactive program that helps women create their unique road map to love.

**Grace Gravestock, Sacramento Consulting**, celebrated her one year anniversary at Dell. She is the communications lead for one of Dell's largest global initiatives, part of a central Organizational Change Management team. Grace is a global communications and change leader with more than 18 years' experience across multiple industries and countries.

**David Hamer, Los Angeles Audit**, started his own investment advisory firm, Integrity Asset Management, which specializes in money management and financial planning. In addition to his CPA license, David has achieved the Chartered Financial Analysis designation (CFA) and is a Certified Financial Planner (CFP®). On the personal front, he got married two years ago and is expecting his first child in June.

**Jans Iverson, Seattle Deloitte Advisory**, joined the Microsoft Dynamics CRM group in Bellevue, WA in January. His role focuses on worldwide compliance and regulatory requirements.

**Cheryl Moore, San Diego Audit**, joined the New York Genome Center in January and was appointed the president and chief operating officer. She has been elected to the board of directors and will assume responsibility for the financial and operational functions of the New York Genome Center.

**Norma Oliason, Seattle Tax**, co-founded the firm King & Oliason. The firm recently celebrated its 25th anniversary. The firm was established to provide high quality client service with a focus on promoting a professional/personal life balance for staff, many of whom enjoy a flexible part-time schedule.

**Ryan Sanders, Los Angeles Deloitte Advisory**, took time to backpack around the world for four months where he traveled through New Zealand, Australia, and South America. He even managed to acquire tickets to the quarterfinals match of the Men's World Cup in Brazil where he watched the France vs. Germany match.

He is currently pursuing his Master's degree at Arizona State University. For half of the program, he also worked as a new product development engineer at Boeing. While at Boeing, he helped design aspects of their future airplanes and also developed and presented business cases for why certain options or ideas should be pursued before others. He will graduate in May 2016 and looks forward to deciding what the next stage of his life holds, whether it is returning to Deloitte, staying at Boeing, or pursuing other great companies.

**Adam Valdez, Los Angeles Consulting**, informs us of the tragic death of his 14 year old daughter, Nikki Valdez, in November 2015. She went off to school in the morning feeling fine and collapsed later in the day at school and died. She was a freshman and an athlete. The real cause of death is yet to be determined and the family has been told it may take as long as six months before anything conclusive is known. The family lives in Encino and his daughter attended a relatively prestigious high school in Sherman Oaks.

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