

The bimonthly newsletter of BKR INTERNATIONAL, the premier association of independent accounting and business advisory firms.

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CHAIRMAN'S LETTER



This edition's letter is certainly bittersweet since it will be my last to you as chairman of BKR International. As my role comes to an end right after our meeting in Santiago, I want to extend my sincere appreciation and gratitude to both the worldwide and regional boards, and especially to you, the members.

We have accomplished a great deal over the

past two years, most notably in our efforts to expand the BKR name recognition worldwide, enhance our leadership and training programs, and grow our membership in India and China. Our social media engagement throughout the world is also at an all-time high.

I know you will continue to assist and support our incoming chair, **Jacqueline Wolfovski** (Paris), whom most of you already know, and those who don't will meet her in Santiago. She has been an active member of BKR for more than 20 years, has served as EMEA Chair from 2002 to 2004, and I know will continue to advance our goals and those of

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BKR'S 2016-2017 LEADERSHIP INSTITUTE KICKS OFF IN ST. LOUIS

The first session of BKR's 2016-2017 Leadership Institute was held at the Hilton St. Louis at the Ballpark in St. Louis, Missouri, on August 3-5.

Led by FranklinCovey Consultant Coral Rice, the sessions included The 7 Habits for Managers and

Communications Advantage. The next session will be held in Chicago, Illinois, on November 2-4.

For more information about the upcoming sessions of the BKR Leadership Institute, visit <http://bkr.com/bkr-upcoming-events.php>.



The first session of BKR's 2016-2017 Leadership Institute was held at the Hilton St. Louis at the Ballpark in St. Louis, Missouri, on August 3-5.

SEE YOU IN SANTIAGO!

BUSINESS AGENDA

FRIDAY, NOVEMBER 11

EMEA Regional Board Meeting

SATURDAY, NOVEMBER 12

Worldwide Board Meeting

Latin American Firms' Meeting

MONDAY, NOVEMBER 14

Welcome to Santiago

Worldwide Chairman's Report

Review and Vote on Audited Financial Statements and Budget

Global Economic Update: Competitive Challenges in a Fast-Changing Economy

Panel Discussion: Creating a Business Development Culture in Your Firm

International Tax Workshop

Breakout Sessions

Orientation for New/Guest Firms



TUESDAY, NOVEMBER 15

Around the BKR World in 60 Minutes: Regional Chairs' Panel Discussion

International Tax Update

Build a Happy Firm Culture for Competitive Advantage

New Trends in Digital and Social Media Marketing

Adaptive Capacity: How Young Leaders are Creating and Embracing Change

How Digital Technology is Transforming Businesses and How We Work

Closing Remarks and Adjournment

Client Business Development Cocktail Reception

PROGRAM HIGHLIGHTS

MONDAY, NOVEMBER 14

Back by popular demand, our keynote speaker, Dr. Jerry Haar, a clinical professor in the Department of Management & International Business at Florida International University, will present a global economic update focusing on the competitive challenges firms need to overcome in this fast-changing economy. He will then moderate a panel discussion with experts from the Economist Intelligence Unit and SAP Latin America South on "Creating a Business Development Culture in Your Firm."

Monday afternoon will be devoted to our popular breakout sessions by topic:

- Business Opportunities in Latin America and Beyond
- International Tax Workshop
- Successful Succession
- Tackling the Global Quest for Talent

TUESDAY, NOVEMBER 15

On Tuesday morning, Chairman **Howard Rosen** (Phoenix) will lead a panel discussion with BKR's regional chairs on worldwide developments. Then, learn how to "Build a Happy Firm Culture for Competitive Advantage," to be led by Javier Irrarrazaval, general manager of The Walt Disney Company in Chile, who will discuss the value of individual and group happiness in achieving maximum productivity and job satisfaction. The morning will conclude with a presentation by marketing expert, Felipe Uribe, on "New Trends in Digital and Social Media Marketing."

Tuesday afternoon will feature Juan Carlos Eichholz, a global expert on leadership and organizational change, whose presentation, "Adaptive Capacity: How Young Leaders are Creating and Embracing Change," will discuss how successful young leaders are able to predict and manage the ongoing technological, economic, and environmental changes in their various organizations.

The afternoon will wrap up with digital technology and e-media expert, Nils Strandberg, who will share his visionary insights on "How Digital Technology is Transforming Businesses and How We Work."

Following Tuesday's business session, all members and companions are invited to make global connections at BKR's Business Development Cocktail Reception, organized by our host firm, **Ossandón Auditores Consultores**. Invited guests will include international business leaders, bankers, lawyers, and other local CEOs and entrepreneurs. Whenever possible, we ask that you please make your travel plans so that you may attend. In addition, if your firm has clients or key business contacts in the Santiago area, they are also most welcome to attend the reception. Simply indicate the number of attendees on your registration form.



MEMBER PROFILE:

OSSANDÓN AUDITORES CONSULTORES (SANTIAGO)

Ossandón Auditores Consultores was founded in 1999 in the city of Viña del Mar and has a nationwide presence. Given the special geography of Chile, the firm has two additional offices, one in the capital city of Santiago and another office in the city of Punta Arenas, which is in an area near the end of the continent.

The firm's team of quality professionals is always concerned about achieving the highest standards and providing optimal service to meet the needs of its customers. The firm is headed by Senior Partner **Miguel**

Lopez, who has 30 years of experience in the field of external audit, which has enabled the company to specialize in home services, mining, sea transportation, hospitals, chemicals, aerospace, wood, construction, real estate, port services, and utilities. Internationally, the firm is registered with the Public Company Accounting Oversight Board (PCAOB) of the United States.

What defines us as a company?

Ossandón Auditores Consultores is a serious, reliable, and efficient company that gives

its customers timely, intelligent, and efficient service. They are able to solve complex problems and situations, delivering quality service to its customers.

Services

The firm has a wide range of professional services, which are based on

six key areas:

- Audit
- Tax
- Consulting and Outsourcing
- Human Resources
- CSR
- Training

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The Ossandón Auditores Consultores team

BKR MEMBERS MAKE TOP ANNUAL LISTS

BKR International is pleased to announce that **Anchin, Block & Anchin LLP** (New York) has made *Inside Public Accounting's* 2016 Top 100 Firms list. For the full report, visit http://insidepublicaccounting.com/wp-content/uploads/2016/08/INSIDE-Public-Accounting_IPA-100-Rankings.pdf.

The following BKR members made *Inside Public Accounting's* 2016 Top 200 Firms list: **Briggs & Veselka Co.** (Houston), **Mize Houser & Company P.A.** (Topeka), **Gross, Mendelsohn & Associates, P.A.**

(Baltimore), **Gumbiner Savett Inc.** (Los Angeles), and **The LBA Group** (Jacksonville). Read the full report at http://insidepublicaccounting.com/wp-content/uploads/2016/08/INSIDE-Public-Accounting_IPA-200-Rankings.pdf.

Last but not least, **Nisivoccia LLP** (Mt. Arlington) has made *Inside Public Accounting's* 2016 Top 300 Firms list. For the full report, visit http://insidepublicaccounting.com/wp-content/uploads/2016/08/INSIDE-Public-Accounting_IPA-300-Rankings.pdf.

Also, BKR is pleased to announce that the following BKR member firms made *Accounting Today's* Best Firms to Work For list: **Bland & Associates, P.C.** (Omaha), **Cornwell Jackson** (Dallas), **Johanson & Yau Accountancy Corporation** (San Jose), and **Snyder Cohn, PC** (Washington, D.C.). Read the article at <http://www.accountingtoday.com/news/firm-profession/accounting-today-names-2016-best-firms-to-work-for-78887-1.html>.

BKR IN THE PRESS

BKR was featured in the article, "Top 10 Challenges of Managing a Firm with Multiple Offices," on *AccountingWEB*.

BKR's recent EMEA Regional Board appointments were featured on the *International Accounting Bulletin* website. Read more at <http://www.internationalaccountingbulletin.com/announcements/appointments-bkr-international-4943069>.

BKR ranked sixth in *AccountancyAge's* survey of alliances and associations. Visit <https://www.accountancyage.com/2016/07/13/the-top-40-networks-2016-firms-switching->

[networks-like-a-game-of-musical-chairs](#) for more details.

BKR was ranked among the top 25 networks and associations in *Accountancy Magazine's* recent survey for 2015.

BKR was featured in the *Accounting Today* article, "BKR International Awards \$12,000 in Annual Scholarships to Global Students." Read the article in its entirety at <http://www.accountingtoday.com/blogs/accounting-tomorrow/news/bkr-international-awards-12k-in-scholarships-to-global-students-78938-1.html>.

CHAIRMAN'S LETTER

(Continued)

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our members.

Speaking of Santiago, I am looking forward to joining all of you at what will surely be an unforgettable event in an extraordinary location. Our 2016 Annual Worldwide Meeting will focus on all aspects of business building, staff development, client service, and technology. The social agenda includes all of the famous sights, sounds, and tastes for which Chile is famous. And, if one country is not enough to satisfy your wanderlust, BKR is proud to offer pre- and post-meeting excursions to Machu Picchu in Peru, as well as other worldclass destinations in Ecuador and Argentina.

Best of all, **each member firm receives one free registration**, which includes all business sessions, social events, group meals, and tours. In addition, we provide a travel subsidy to our smaller members in countries with GDPs of less than U.S. \$10,000. Contact your regional executive director to see if you qualify. I would love to see at least two representatives from each firm in attendance.

For the full business agenda and program highlights, see page 2. And, to register for the meeting, make your hotel reservation, and

investigate various tour options, visit www.bkr.com. **Please note that all hotel reservations and meeting registrations must be received by Monday, September 26, to ensure rate and availability.**

Please also note that the Executive Office is collecting your 2016 Member Information data, which our bylaws require that you complete on an annual basis, and to insure accurate firm contact details for our 2017 Directory of Members. To access the online system and enter your information, simply log into www.bkr.com, then click on the Member Information link in the left menu. All financial information will be kept strictly confidential, and will be available only to the Worldwide Board and your respective regional board.

I look forward to seeing you all in November for what I know will be an exceptional conference we will all long remember. Please do not forget I promised you something you have never seen before.

Regards,



Howard Rosen

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SUBMISSIONS

BKR welcomes news and articles from member firms, committees, and task forces, which can be submitted via e-mail, fax, or mail to BKR's Executive Office.

NICHE NEWS

Affordable Housing Chair – Karen Kent (Boston)

The Affordable Housing Practice Group held a telemeeting on June 15. The group discussed recent legislative updates related to low-income housing, outsourcing and use of interns during busy season, and updates on GAAP implementation. The next telemeeting will be held jointly with the Real Estate and Construction Practice Group on September 21.

Business Development Chair – Jeff Calderon (Louisville)

The Business Development Practice Group held a telemeeting on July 12. The group discussed their individual roles in their firms and their level of involvement in business development activities. They discussed topics and potential speakers for the next teleseminar and chose Carrie Steffen from The Whetstone Group. Carrie will present a session on using client services to create successful business developers. The next telemeeting will be held on September 22.

Firm Administrators Chair - Colin Jackson (Boston)

The Firm Administrators Practice Group held a webinar on July 19. Guest speaker Jason Goldfinger from Citrix ShareFile for Accounting gave a demonstration of the software and discounts available to members. Citrix is the leader in file sharing, electronic signatures, and remote access built for accounting firms. The next telemeeting will be held on October 25.

REMINDER!

**Submissions for the
November/December 2016
issue of the BKR
International Worldwide
Bulletin are due by October
3, 2016.**

Forensic Accounting/Litigation Support

Chair – Marnie Silver (Toronto)

The group's teleseminar took place on August 15. Chair **Marnie Silver** and **Josh Epstein** (Toronto) presented "Fraud Schemes Affecting the Construction Industry" and "Interviewing Techniques," respectively. The next teleseminar will be held on November 28.

Marketing

Chair – Delene Taylor (Louisville)

BKR's Marketing Practice Group held a telemeeting on July 27. The group discussed the use of LinkedIn for business development and client relationships, marketing's role in recruiting, and implementation of CRM systems. The next telemeeting will be held on October 12.

Real Estate and Construction Chair – Katie Eyre (Portland)

The Real Estate and Construction Practice Group held a teleseminar on July 28. Guest speaker Mike Pruss from Scarpello Consulting presented a session on "Cost Segregation: Enhancing Cash Flow Through Accelerated Depreciation." The next telemeeting will be held on September 21 with the Affordable Housing Practice Group.

Tax (International/Americas Region)

Chair – Ken Laks (Long Island)

Transfer pricing experts from Charles River Associates presented a webinar to the group on August 8. They covered "hot topics," including base erosion and profit shifting (BEPS), as well as transfer pricing issues to look out for. The group's next telemeeting will be held on December 12.

Tax (State and Local)

Chair – Jason Goloboy (Boston)

BKR's "SALT" Practice Group held a teleseminar on July 25 on the Mobile Workforce State Income Tax Simplification Act that was led

by Doug Lindholm, Esq. of the Council on State Taxation in Washington, D.C. Participants received one hour of CPE credit. Their next telemeeting will be held on October 24.

Tax (U.S.)

Chair – John Beauston (Charleston)

XCM's president, Glen Keenan, will kick off BKR's 2016 Tax Management Workshop at the Hilton O'Hare Hotel in Chicago on October 28. Glen's two-hour session will focus on improving processes and procedures in the tax department. Having spent 10 years at Deloitte in Boston, Glen's specialty now focuses on tailoring the best mix of staffing, workflow solutions, and internal controls for optimum efficiency and minimum risk. The remainder of the day will be devoted to participant topics. All are invited to attend BKR's group dinner the evening before at Gibson's Steakhouse – always a Chicago favorite!



Glen Keenan

Register for the meeting at <http://bkr.com/bkr-event.php?U.S.-Tax-Workshop-465>.

At their last telemeeting on July 11, the group discussed the proper structuring of captive insurance companies, the pros and cons of populating software, and staffing between the A&A and tax departments. Additionally, **Yair Holtzman**, who heads up the R&D Tax Credit Practice at **Anchin, Block & Anchin LLP** (New York), gave the group an overview of R&D Tax Credits, and reviewed the new changes that were signed into law on December 18, 2015.

Technology (Internal)

Chair – Bob Daugherty (Louisville)

The Technology (Internal) Practice Group held a telemeeting on August 3. Topics included CRM software, Office 2016, Engagement 7.5, Office 365, CCH Axxess, two-factor authentication, and password management applications. The group's next telemeeting is scheduled for November 2.

MEMBER NEWS AND NOTES

Amstelveen, The Netherlands

Molade Trust Management B.V. is proud to announce the birth of a sister company, **Molade Business Support B.V.** ("MBS"), and she is doing well. MBS offers a wide range of business support services to foreign companies starting up in the Netherlands, including incorporation, financial services, payroll services, etc. MBS is a one-stop shop operation securing a hassle-free transition for the clients' business in the Netherlands. Check out her birthday card at: <http://www.businesssupport.amsterdam>.



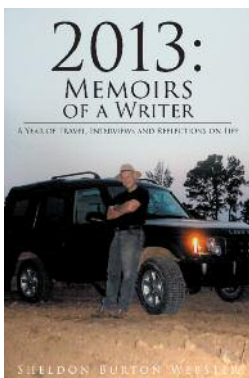
Molade Business Support B.V.

Baltimore, Maryland, USA

Gross, Mendelsohn & Associates, P.A. is pleased to announce that **Diana DeWitt**, CPA, CCIFP, was named partner in the firm. In addition to her expertise in conducting overhead rate audits, Diana provides financial statement audits, reviews and compilations, as well as business and individual tax planning, management advice, and accounting system advice. She is a frequent speaker on overhead rates and has spoken at National Highway Institute seminars and American Council of Engineering Companies conferences.

Birmingham, Alabama, USA

Borland Benefield, P.C. has announced that **Sheldon Webster** has published a new book, entitled *2013: Memoirs of a Writer - A Year of Travel, Interviews and*



Sheldon Webster's new book

Reflections on Life. For more information, visit <http://bkr.com/cmsAdmin/uploads/sheldon-webster-memoirs-of-a-writer.pdf> and <https://www.pagepublishing.com/books/?book=2013-memoirs-of-a-writer-a-year-of-travel-interviews-and-reflections-on-life>.

The firm has also announced that **Jeffrey Chandler** co-presented the complimentary web seminar, "5 Ways to Improve Your Engagement Workflow Efficiency," on June 21.

Bogota, Colombia

BKF International S.A. Auditores y Consultores has announced that **Humberto Fernandez**, managing partner, was unanimously elected president of ACEF (Association of Colombian Financial Executives) and as vice president of INCP (Institute of Colombian Public Accountants). His objective is to continue to strengthen the profession, and promote BKR International and its members throughout Colombia.



Humberto Fernandez

Brisbane, Australia

SRJ Walker Wayland is proud to formally announce the appointment of **Jason Croston** as managing director. Jason has been a very successful and long-standing director of the firm and remains leader of the firm's Audit Division. Jason is vice chairman of BKR International's Asia-Pacific Regional Board and chairman of the BKR International Asia-Pacific Standards Committee. Jason is a quality reviewer for Chartered Accountants Australia and New Zealand (CAANZ), where he reviews and assists other chartered accountants with ensuring that they have appropriate quality standards in place within their own practices.



Jason Croston

Canton, Ohio, USA

Hall, Kistler & Company LLP has

announced that Managing Partner

Karen Brenneman, CPA, MT, has been tapped to help implement the comprehensive plan of Canton, Ohio. For more, visit <http://www.cantonrep.com/news/20160601/cantons-first-comprehensive-planning-group-picked>.



Karen Brenneman

The firm has also promoted **Sandra Orcutt** to supervisor and **Alex Ferrara** to senior accountant. **Michael Grafton** and **Alexandra Smith** recently joined the firm as staff accountants, and **Sarah Yost** and **Kelley Auvil** have completed their QuickBooks Desktop and QuickBooks Pro 2016 online certifications.

Sandra started as a seasonal preparer and was hired as a staff accountant in 2013. Her areas of concentration include 1040s and estates, as well as preparation of tax returns, audits, reviews, and compilations.

Alex practices in the areas of individual and corporate taxation and audits and is a member of the Non-Profit Niche. He is a member of the Ohio Society of Certified Public Accountants and a member of the Canton Regional Chamber of Commerce.

Michael's duties will include preparation of financial statements, tax, audit, and engagements.

Alexandra's areas of practice will include tax, audit, compilations, and reviews.

Sarah is certified in Xero and is a QuickBooks ProAdvisor. She also practices in the areas of accounting, audit, and tax for clients in the restaurant, medical, and manufacturing industries.

Kelley has been with the firm since 1982 and is a Certified QuickBooks ProAdvisor®. Her expertise includes reporting, bank reconciliations, and write-ups in QuickBooks and Peachtree, as well as payroll tax preparation.

Cincinnati, Ohio, USA

Rudler, PSC would like to warmly thank

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MEMBER NEWS AND NOTES

(Continued)

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all who contributed, played, and worked to make our First Annual Charity Golf Outing a success! On July 22, more than \$26,000 was raised to benefit the Northern Kentucky Education Council. The Northern Kentucky Education Council convenes leaders and aligns education initiatives, birth to career, across six counties in Northern Kentucky.

Houston, Texas, USA

Business owners and C-suite executives gathered at the DoubleTree Hotel Greenway on June 9 to hear esteemed speakers like Dr. Robert Gilmer, professor and director at UH Bauer Institute for Regional Forecasting, and Captain Bill Diehl, president at the Greater Houston Port Bureau. There was a panel presentation that featured Gary Junek of MidSouth Bank, Bill Haskett of Decision Strategies, Inc., and Scotty Reynolds of OFS Energy Fund. The panel was moderated by **Jason Sharp**, tax shareholder at **Briggs & Veselka Co.** (B&V).

B&V Insights is held annually. **Adam Dimmick**, audit shareholder, presented a lease accounting update. **Bob McDonald**, tax shareholder, spoke about the history of taxes, updates, and what is expected from the different presidential nominees.



Briggs & Veselka Co.'s annual event, B&V Insights

Jacksonville, Florida, USA

The LBA Group has announced that **Marley Harris**, CPA, has been hired as director of LBA's Business Accounting. Marley has more than 18 years of experience in public accounting and is a member of the Florida

Institute of Certified Public Accountants (FICPA).

Gregory Lacina, CPA, has been promoted to senior tax manager. He joined LBA in 2007. Greg focuses his practice on individual and business tax planning and preparation.

Timothy Lamm, CPA, has been promoted to senior manager on the Audit & Assurance Services team. He joined LBA in early 2016. Tim has more than 10 years of experience and handles company financial statement audits, reviews, and compilations, with focus on the manufacturing, construction, and retail industries.

Andrew Brinson, CPA, has been promoted to tax manager. He joined the firm in 2011 as an intern. Andrew has five years of experience in public accounting and focuses his efforts within the healthcare industry.

Tina Dryden, CPA, has been promoted to tax manager. She joined LBA's tax team in 2012 as a staff accountant. Tina focuses on tax preparation, year-end tax planning, and business services.

Cody Vincent, CPA, has been promoted to tax manager. He joined LBA in 2012 as a staff accountant.



Marley Harris



Gregory Lacina



Timothy Lamm



Andrew Brinson



Tina Dryden



Cody Vincent

Kansas City, Kansas, USA

Mize Houser & Company P.A. is pleased to celebrate 60 years of serving clients this summer. Firm shareholders and employees are celebrating with activities, including a program called Gifts of 60, where employees in each of the firm's three offices will donate 60 items to their charity of choice. The Overland Park location is pleased to continue our long standing support of Ronald McDonald House Charities. This summer, employees across the firm formed 20 teams to participate in activities to show their #TeamMize spirit. Teams are encouraged to engage in multiple community activities and support client's businesses.

Kolkata, India

Doshi, Chatterjee, Bagri & Co LLP has announced that Partner **Chandi Bagchi's** (Kolkata) article, "Outsourcing of Internal Audit – Professional Game Changer," has been published in the June issue of *The Management Accountant*, a prestigious professional journal in India. Read the piece in full at http://bkr.com/cmsAdmin/uploads/outsourcing_internal_audit_the_professional_game_changer.pdf. A synopsis of the article may also be read at http://bkr.com/cmsAdmin/uploads/synopsis_ia_outsourcing_article_in_icmai_journal.docx.

Mt. Arlington, New Jersey, USA

On June 17, **Nisivoccia LLP** employees dressed in jeans donated to a not-for-profit organization, Angels for Mark.

On June 9, Team Nisivoccia LLP walked and ran at Community Hope's 15th Annual Veterans Flag Day 5K Run and Fun Walk to support homeless veterans. Proceeds from the Flag Day 5K Run support Community Hope's Hope for Veteran Programs. The event raised more than \$116,000.

On June 15, **Vivian Fischer**, supervisor at Nisivoccia LLP, presented the New Jersey Society of Certified Public Accountants (NJCPA) scholarship award at the Kinnelon High School

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MEMBER NEWS AND NOTES

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Senior Awards Ceremony. The recipient of this year's NJCPA scholarship award is Emily Coppa.

The New Jersey Association of School Business Officials (NJASBO) held its 2016 Affiliate Meeting from June 7-10 in Atlantic City. **Kathi Mantell**, CPA, PSA, and government partner, gave a presentation entitled, "Enhancing Your Financial Management Skills."

On June 14 and 22, Nisivoccia LLP hosted its annual "Preparing for Your Audit" seminar for its school board clients.

On June 21, **Marcia Geltman**, CPA, and **Glenn Schwier**, CPA, JD, hosted a seminar for local attorneys entitled, "Understanding the Tax Impact of Real Estate Transactions."

The Nisivoccia LLP Young Professionals held their second annual Networking Event on June 23 at Sona Thirteen in Morristown.

Nisivoccia LLP was awarded the Best Company Special Promotion Award at the 32nd Annual Metropolitan Builders & Contractors Association's (Metro's) Awards of Excellence. The awards ceremony took place on June 9 at the Dolce Hotel in Basking Ridge.

Paris, France

On June 20, after 16 years, **Exponens** moved to new offices in Cergy, a northwestern suburb of Paris.

On June 19, Exponens took part in the race, Les Foulées de l'Immobilier (The Strides of Property), organized by the Masters 246 "Property Management" course at the Université Paris-Dauphine, alongside 1,200 real estate professionals. Twelve male and female athletes from the Exponens team ran the 10-kilometer race in the Bois de Boulogne near Paris. From the team, the first man to cross the finish line was **Charles Toublet** with a time of 45:09, followed closely by Partner **Arnaud Cheval**. For the women, it was **Drana Samson** with a time of 56:58. The firm intends to participate again next year.

On July 5, at the Novancia Business School in Paris, the CleanTech Open France semi-final, a program to promote the most eco-innovative startups in the sector who are **Eurus** alliance partners, was held. **Matthias**



Exponens participated in Les Foulées de l'Immobilier on June 19.

Collot, for "Renewable Energies," and **Alexis Boudet**, for the "Digital and Internet of Objects," were among the jury members. **Thierry Legrand** and **Jean-Jacques Touret** proposed to candidates an exchange giving concrete keys about accounting, legal, and tax on finance and innovation for their CleanTech project.



The CleanTech Open France semi-final

Pittsburgh, Pennsylvania, USA

Louis Plung & Company is proud to announce recent employee promotions.

Charles Jerich, an employee since 2012, was promoted to tax manager effective July 1. Previously, he was supervising senior in the Tax Department. His experience includes more than 25 years working at Big 4 and regional public accounting firms in Pittsburgh and Chicago.



Charles Jerich

Also earning promotions this year are **Isabel Li** (tax) and **Justin Battaglia** (audit and assurance). On July 1, both were promoted from staff to senior I in their departments.

Isabel started as a seasonal tax preparer in January 2015 and as full-time tax staff in June 2015. She works on family and individual income tax returns, trusts, foundations, and partnerships. She is actively involved in individual, fiduciary, and tax-exempt organization planning and projects.



Isabel Li

Justin first joined as a summer intern in 2012 and joined the Audit Department full time in January 2014. His role has evolved from learning the audit methodology and audit procedures to meeting with clients, participating in fieldwork, and more recently planning and supervising audit engagements, as well as professional staff.



Justin Battaglia

St. Louis, Missouri, USA

Conner Ash P.C. has welcomed **Charles Gray** as a manager in the firm's Tax and Business Services Department. Chuck is a CPA and an attorney with more than 20 years of experience in providing estate and tax planning services, as well as tax controversy resolution services to individuals and businesses.



Charles Gray

Toronto, Ontario, Canada

SF Partnership, LLP is proud to announce that **Matthew Roman** has been awarded the Ontario Gold Medal for the highest marks in completing the Common Final Examination (CFE), which is Canada's admission exam for the CPA designation. Congratulations to Matthew on his outstanding accomplishment.

BKR MEETING/TELEMEETING SCHEDULE 2016

September 13	Manufacturing Practice Group Dinner Indianapolis, Indiana, USA
September 19	Manufacturing Practice Group Telemeeting*
September 20	Future Leaders Practice Group Telemeeting*
September 21	Real Estate/Construction and Affordable Housing Joint Telemeeting*
September 22	Business Development Practice Group Telemeeting*
September 23	Canadian Tax Meeting Offices of Lohn Caulder LLP Vancouver, British Columbia, Canada
September 26	Business Valuation Practice Group Telemeeting*
September 27	Human Resources Practice Group Telemeeting*
September 29	EURUS Subregional Meeting Brussels, Belgium
October 12	Marketing Practice Group Telemeeting [1:00 p.m. Eastern Time]
October 19	High Net Worth Families/Estate Planning Practice Group Telemeeting*
October 24	SALT Practice Group Telemeeting*
October 25	Firm Administrators Practice Group Telemeeting*
October 28	U.S. Tax Workshop Hilton Chicago O'Hare Airport Chicago, Illinois, USA
November 2	Technology (Internal) Practice Group Telemeeting*
November 2-4	Leadership Institute - Session 2 Embassy Suites Chicago Downtown Chicago, Illinois, USA
November 7	Business Valuation/Forensic Accounting Practice Group Dinner Nashville, Tennessee, USA
November 12-15	ANNUAL WORLDWIDE MEETING The Ritz-Carlton Santiago, Chile
November 14-16	Staff Tax Training - Level Four Embassy Suites Chicago Downtown Chicago, Illinois, USA
November 28	Forensic Accounting/Litigation Support Practice Group Teleseminar*
November 28	EMEA Region Tax Meeting Amsterdam, The Netherlands
November 29	EMEA Region Future Leaders Meeting Amsterdam, The Netherlands
December 5	Managing Partner Roundtable Meetings Hyatt Regency Orlando Airport Orlando, Florida, USA
December 8	Real Estate and Construction Practice Group Dinner Las Vegas, Nevada, USA
December 12	International Tax (Americas) Committee Telemeeting*

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January 11-13	Leadership Institute - Session 3 Embassy Suites Houston, Texas, USA
May 3-5	Leadership Institute - Session 4 Hilton Metropolitan New York, New York, USA
May 5-8	JOINT ASIA-PACIFIC/EMEA REGIONAL MEETING Mandarin Orchard Hotel Singapore, Singapore
June 3 June 3-6	Governmental/Not-for-Profit Accounting and Auditing Practice Group Meeting AMERICAS REGIONAL MEETING The Brown Hotel Louisville, Kentucky, USA
October 21-24	ANNUAL WORLDWIDE MEETING InterContinental London Park Lane London, United Kingdom

* All telemeetings are held at 2:00 p.m. Eastern Time except where noted.