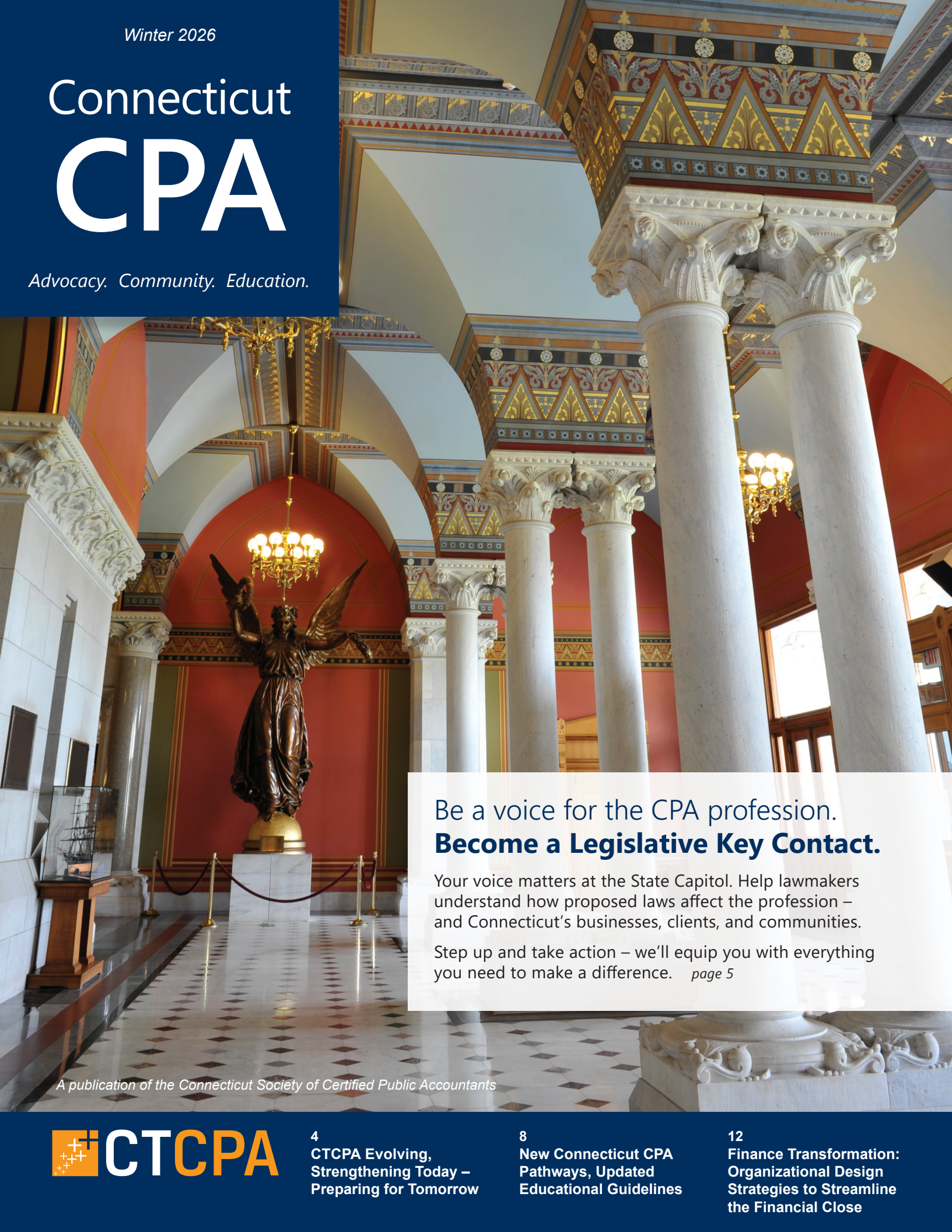


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Step up and take action – we’ll equip you with everything you need to make a difference. *page 5*

A publication of the Connecticut Society of Certified Public Accountants



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CTCPA Day of Giving Raises More than \$13,000 for Connecticut Foodshare and Hundreds of Toys for Connecticut Children’s Medical Center

Rain, sleet, snow – the first storm of the season couldn’t stop CTCPA members as our New and Young Professionals Cabinet teamed up with the Connecticut Bar Association Young Lawyers Section for the fifth annual CTCPA Day of Giving!

Thanks to the generosity of member **Joseph Clark** and his wife **Daria**, who wrote a check for \$5,000, we were able

to give a CTCPA-record-breaking more than \$13,000 to Connecticut Foodshare and hundreds of toys for Connecticut Children’s Medical Center.

We are so proud of this community – thank you.

>> View photos at www.ctcpas.org/DayofGiving.



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From the Executive Director and CEO



CTCPA Evolving, Strengthening Today – Preparing for Tomorrow

The accounting and finance profession is changing faster than ever, and CTCPA is committed to ensuring our members stay ahead of those changes. While we continue to deliver the day-to-day support you rely on – from advocacy and regulatory guidance to professional education and community connection – we are equally focused on preparing you, your organizations, and your staff for what comes next.

Across the country, CPA pipeline shortages, rapid advances in technology, shifts in employer expectations, and changing preferences among younger professionals are reshaping the profession. In this environment, doing things the way we did them even a few years ago is no longer enough. CTCPA must remain agile, forward-looking, and ready to evolve.

That is why, in January, our Board of Directors, Advisory Council, and volunteer leaders are participating in a strategic session to review our membership model, explore how we can strengthen engagement, and identify new ways to deliver value in a world that looks very different from before. This effort reflects our mindset: to equip our professionals for today's realities and tomorrow's opportunities.

The session will explore questions such as:

- How do we support firms, finance departments, and professionals more effectively in a changing landscape?
- What will younger generations expect from their professional community?
- How can CTCPA continue to stand apart in advocacy, community-building, and Connecticut-specific knowledge – the highest-ranked benefits among members?
- How can we ensure the Society remains strong, relevant, and sustainable for decades to come?

This is the start of a thoughtful, transparent modernization effort – one that will include member input, firm and company conversations, listening sessions, and regular communication along the way.

We want you to know that CTCPA is not standing still. We are moving forward with intention, reevaluating how we serve you, and ensuring that both our organization and our members are ready for whatever comes next in this rapidly evolving profession.

Thank you for being part of a community that leads, adapts, and grows together. More updates will follow in the months ahead – and we look forward to engaging you in this important work.

A handwritten signature in blue ink that reads "Bonnie". The signature is fluid and cursive.

Bonnie Stewart, Executive Director & CEO



Become a CTCPA Legislative Key Contact

Every day at the State Capitol, legislators make decisions that affect you, your business, and your clients. That's why it's so important for our elected officials to understand how proposed laws could impact the business community.

As a CPA or accounting professional, you're in a unique position to help – you can break down complex tax, financial, and economic issues in a way that really matters. Lawmakers value hearing directly from their constituents, and your insight can make a real difference in the legislative process.

Our Legislative Key Contact program brings together members who can work with the CTCPA and elected officials during the legislative session when key issues arise. We'll keep you informed with the details you need.

>> Sign up or learn more at www.ctcpas.org/KeyContact.

Legislative Key Contacts will:

- **Build and maintain a relationship with a legislator.**
If you already know someone, that's fantastic – but if not, we'll help you make that first connection.
- **Call or meet with your legislator about key proposals or issues impacting the CPA profession.**
We'll supply you with all the background information and research you'll need.
- **Attend CTCPA legislative events and update sessions.**
We'll keep you in the loop and ready to make an impact.

Time is Money: The AKC Saves Both

Powered by CCH AnswerConnect from Wolters Kluwer, the **Accountant Knowledge Center (AKC)** platform delivers the latest in tax and compliance information (valued at over \$14,000) at no cost to you.

Boost your year-end and tax planning with new features like:

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- Special content on the 2025 tax bill with focused self-guided CPE trainings

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Northeast Finance & Accounting Convention

Inaugural Convention a Hit!

What an incredible start! Thank you to everyone who joined us at Foxwoods Resort Casino for the inaugural Northeast Finance & Accounting Convention; it was a dynamic mix of insight, innovation, and inspiration. From small firm owners to leaders in Fortune 500 companies, professionals across the finance and accounting spectrum came together for two packed days of learning, networking, and idea-sharing.

Attendees from six states left with new connections, fresh perspectives, and actionable strategies to implement in their organizations.

If you missed it this year, you'll definitely want to join us at next year's convention – it's only getting bigger and better! Stay tuned for details.



Pictured at the Northeast Finance & Accounting Convention ribbon-cutting ceremony are (from left) keynote speaker **Tom Hood** (AICPA-CIMA and the Business Learning Institute), Advisory Council Chair **Eliot Bassin** (Fiondella, Milone & LaSaracina LLP), Chair-elect **Muhammad Malloy** (CohnReznick), AICPA Chair **Lexy Kessler** (Aprio), Chair **Mary Manfredi** (General Dynamics Electric Boat), Board of Directors Member-at-Large **Kariann McDougall** (EY), and Treasurer **Amber Moore** (Goldblatt Bokoff LLC).

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CPA, CITP, CGMA
 EVP, Business Growth & Engagement
 for AICPA-CIMA and the
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Amy Vetter
 Keynote Speaker, CPA, Yogi, and
 CEO of The B³ Method Institute



Ezra Greenberg
 Partner at McKinsey & Company



“As a consultant supporting nonprofits in finance and technology, this convention delivered exceptional value. It offered deeper insights into AI and finance, stronger connections, and more actionable strategies than any other two- or three-day conference I’ve attended. I left energized, informed, and equipped. I highly recommend attending next year.”

– Michelle Hopson, Principal at Hopson Consultancy LLC



New Connecticut CPA Pathways, Updated Educational Guidelines

Connecticut has adopted three flexible pathways to CPA licensure, expanding access to the profession while maintaining the integrity of the credential through education, examination, and experience.

State Board of Accountancy Adopts New Educational Guidelines for CPA Licensure

The Connecticut State Board of Accountancy has approved draft regulations outlining new educational requirements to support the new pathways. These draft regulations will serve as guidelines to be used by the Department of Consumer Protection until the new regulations are finalized.

The draft regulations are subject to change before final adoption, and any concerns identified during the approval process may prompt further review and modification of the guidelines by the board.

Under the new guidelines:

- Candidates must complete **27 credits in Accounting** and **24 credits in Economics and Business Administration other than Accounting**.
- References to general education have been removed.
- The **120-credit hour requirement to sit for the CPA Exam** remains unchanged.

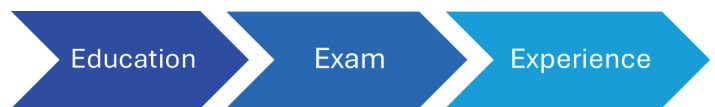
CPA Licensing Alignment in the Northeast and Nationwide

Connecticut's changes reflect a broader effort to strengthen the CPA pipeline and align state laws with the evolving profession.

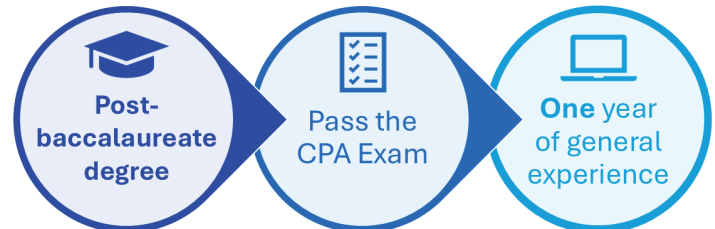
Flexible pathways, including those for bachelor's degree holders, are being rapidly adopted nationwide, with all 50 states and three jurisdictions expected to complete the transition within the next five years, if not sooner.

You can track the conversation in all licensing jurisdictions at www.ctcpas.org/MobilityandPathways. >>

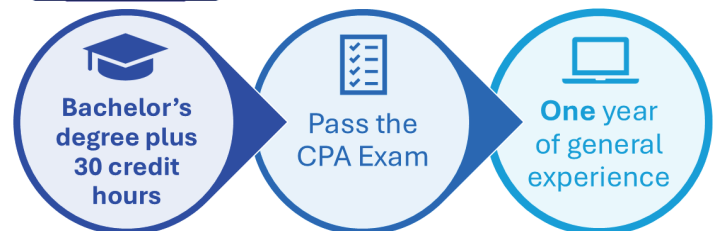
Pathways for Connecticut CPA Licensure



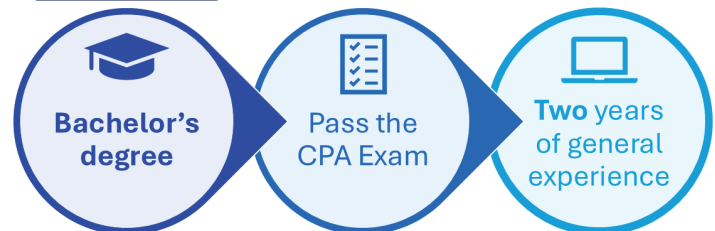
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Path 2



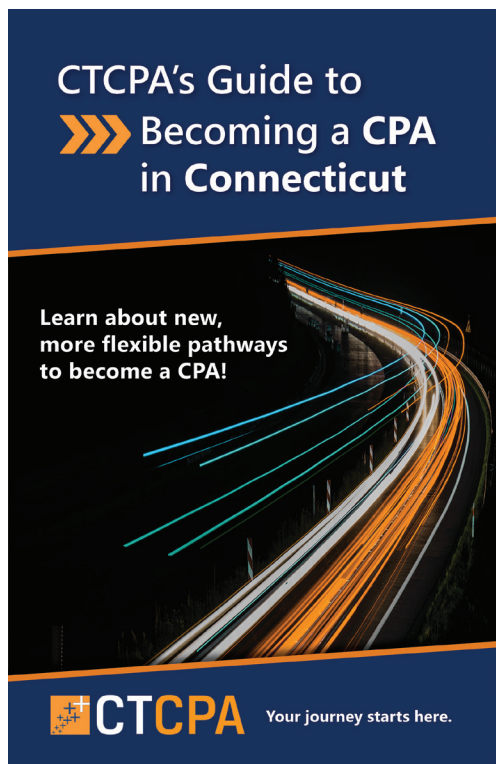
Path 3



Get the latest updates at
www.ctcpas.org/MobilityandPathways.



Students at the Post University Accounting is My Major (AIM) program show off their CTCPA-branded sunglasses; their future is so bright, they need to wear shades!



Becoming a CPA in Connecticut Guide Updated for 2026

After years of helping aspiring CPAs navigate their journey, we've packed all our best tips and insights into one must-have guide. Our free five-step handbook covers everything you need to know about becoming a Connecticut CPA.

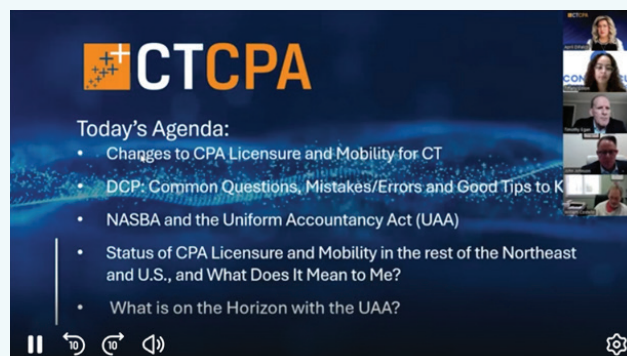
The 2026 update includes the three new pathways, updated educational requirements, and much more.

Access this guide and other resources – including the “Why Become a CPA” fact sheet, FAQs, forms, and helpful tools – at www.ctcpas.org/BeACPA.

Have specific questions or want a CTCPA speaker to visit your company or classroom to discuss becoming a CPA?

Reach out to CTCPA Outreach & Engagement Specialist **April DiFalco** at 860-258-0212 or april@ctcpas.org.

CTCPA Town Hall Meeting On Demand: Navigating Connecticut CPA Licensure



With new licensure pathways and expanded practice mobility now in effect as of October 1, 2025, the November Town Hall Meeting presented a chance to hear directly from the experts leading and implementing these reforms:

- **Timothy Egan**, Chair, Connecticut State Board of Accountancy
- **John Johnson**, Vice President, Legislative and Governmental Affairs, NASBA
- **Tiffany Colon**, Associate Accounts Examiner, Connecticut Department of Consumer Protection

Catch the Town Hall Meeting on demand now at www.ctcpas.org/TownHallMeetings as the experts break down what's changed, what's ahead, and the key insights every CPA and candidate needs to know – including the five most common mistakes CPAs make, according to the DCP.

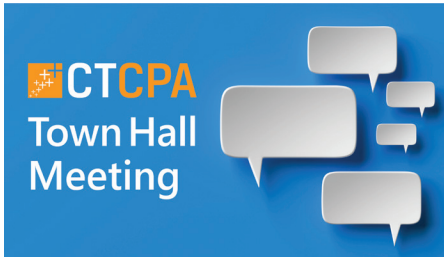
Registration is open for the 2026 CTCPA Town Hall Meeting series!

Get more information on page 10 of this issue or at www.ctcpas.org/TownHallMeetings.

Member Meetings



Register and find more at www.ctcpas.org/MemberMeetings.



CTCPA Town Hall Meetings – Register Now for the Full 2026 Series!

Join us for our monthly Town Hall Meetings – a must-attend event for anyone looking to stay ahead of the latest hot topics impacting the profession. This is your chance to engage with leading voices in the finance and accounting industry. Gain insights, ask questions, and connect with experts who are shaping the future of our field. Learn more and register at www.ctcpas.org/TownHallMeetings.

Third Wednesday of the Month • 9:00-10:00 a.m. • Online • 1 credit

January 21	July 15
February 18	August 19
March 18	September 16
April 15	October 21
May 20	November 18
June 17	December 16

Want to register for the full 2026 series?

Please email Outreach & Engagement Specialist **April DiFalco** at april@ctcpas.org and she can take care of registration for you!

TechConneCT Roundtables 9:00-10:30 a.m. • Online

Connect with members of the CTCPA Technology Group for an exchange of ideas, best practices, and practical applications.

Tips and Tricks to Tax Season IT Thursday, February 12

The Good, the Bad, and the Ugly of Tax Season Thursday, May 14

Employee Benefit Plans Group Meetings

Friendly, interactive meetings include roundtable discussion of changes affecting plans, auditors, and employers.

Thursday, January 22 • 9:00-10:00 a.m. • Online
Wednesday, April 29 • 9:00-10:00 a.m. • Online

Federal Taxation Group Meeting

The group welcomes those with an interest, no matter your career stage or level of expertise. Bring your questions or pain points for the tax season!

Wednesday, February 11 • 8:30-9:30 a.m. • Online

Governmental Accounting & Auditing Group Meetings

Discuss developments, regulations, and compliance issues with public sector and public accounting professionals.

Tuesday, February 3 • 9:00-10:00 a.m. • Online
Tuesday, April 21 • 9:00-10:00 a.m. • Online

Not-for-Profit Organizations Group Meeting

Focus on accounting, taxation, and financial reporting for not-for-profits.

Thursday, May 21 • 9:00-11:00 a.m. • Online



Member Appreciation Day

Tuesday, January 27 • 9:00 a.m. - 4:30 p.m. • Online
6 credits

We're excited to introduce our first Member Appreciation Day! Join us for this virtual event designed to say thank you with six hours of free CPE on today's most relevant topics.

CTCPA Groups and Committees

Special Interest Groups

Join groups and find upcoming meetings at www.ctcpas.org/Groups.



Accounting, Auditing, Financial Reporting Group

Discuss exposure drafts and enhance relationships with standard-setters.

Contact: April DiFalco • april@ctcpas.org



Cannabis Group

Meet and learn together with others exploring and working in this new hot topic.

Contact: Lisa Bugryn • lisab@ctcpas.org



Chief Financial Officers Group (Exploratory)

Share best practices, industry trends, regulatory updates, and offer professional development opportunities.

Contact: April DiFalco • april@ctcpas.org



Educators Group

Discuss hot topics in this candid, conversational group.

Contact: April DiFalco • april@ctcpas.org



Employee Benefit Plans Group

Discuss issues affecting benefit plans, program audits, and employers.

Contact: Lisa Bugryn • lisab@ctcpas.org



Federal Taxation Group

Discuss issues and build relationships with legislators and regulators.

Contact: April DiFalco • april@ctcpas.org



Financial Institutions Group

Share trends, regulatory and legislative developments, and new pronouncements.

Contact: April DiFalco • april@ctcpas.org



Firm/Company Administrators Group

Connect and learn about best practices and tools to help your organization grow.

Contact: April DiFalco • april@ctcpas.org



Golf Group

Support scholarships/grants by helping plan our annual golf tournament.

Contact: April DiFalco • april@ctcpas.org



Governmental Accounting & Auditing Group

Talk FASB, GASB, and single audits with public sector and audit professionals.

Contact: Lisa Bugryn • lisab@ctcpas.org



Internal Audit Group (Exploratory)

Connect with fellow industry members in audit for idea sharing and collaboration opportunities.

Contact: April DiFalco • april@ctcpas.org



Not-for-Profit Organizations Group

Focus on accounting, taxation, and financial reporting for not-for-profits.

Contact: Lisa Bugryn • lisab@ctcpas.org



Pipeline Task Force

Work with subcommittees to inspire students, promote accounting, and support future Connecticut CPAs.

Contact: April DiFalco • april@ctcpas.org



State Taxation Group

Navigate the regulatory and legislative aspects of Connecticut tax compliance.

Contact: April DiFalco • april@ctcpas.org



TechConneCT Roundtable

Ask and answer questions on anything related to technology or software at our interactive roundtables.

Contact: April DiFalco • april@ctcpas.org



Trust, Estate, and Gift Taxation Group

Discuss taxation, trusts, gifting strategies, and more.

Contact: April DiFalco • april@ctcpas.org

Leadership Committees

Leadership committees have specific membership requirements and appointment procedures. Please contact the staff liaison for more.



Membership Committee

Assist with member recruitment and evaluating benefits to increase engagement and the member experience.

Contact: April DiFalco • april@ctcpas.org



New & Young Professionals Cabinet

Plan programs and volunteer opportunities for members aged 35 and younger.

Contact: April DiFalco • april@ctcpas.org



Peer Review Committee

Stay ahead of changing standards and explore the peer review market niche. *Membership by CTCPA Chair appointment.*

Contact: Lynette Lindner • lynettel@ctcpas.org



Investment Committee

Oversee the CTCPA's investment portfolio and report to the Board of Directors.

Contact: Bonnie Stewart • bonnies@ctcpas.org

Governance Committees

Governance committees are by election or appointment only. Please contact the staff liaison for more.



Bylaws Committee

Recommend bylaws modifications to the Board of Directors and voting members. *Membership by CTCPA Chair appointment.*

Contact: Bonnie Stewart • bonnies@ctcpas.org



Nominating Committee

Nominate a slate of leadership nominees and Advisory Council appointees. *Membership by CTCPA Advisory Council election.*

Contact: Bonnie Stewart • bonnies@ctcpas.org



Professional Ethics Committee

Investigate ethics complaints and maintain the Code of Professional Conduct. *Membership by CTCPA Chair appointment.*

Contact: Lynette Lindner • lynettel@ctcpas.org



Audit-Review Committee

Recommend and oversee an independent CPA firm attestation engagement. *Membership by CTCPA Chair appointment.*

Contact: Bonnie Stewart • bonnies@ctcpas.org



Finance Transformation: Organizational Design Strategies to Streamline the Financial Close

By Kelly Harper, CPA – Client Relationship Leader, CliftonLarsonAllen LLP (CLA)

This is the final article in the series “Finance Transformation – People, Process, and Technology.”

The financial close process is a cornerstone of organizational performance, yet it remains one of the most resource-intensive and error-prone activities. While technology and process optimization have been widely adopted to accelerate close cycles, the human element – how teams are organized and deployed – often determines success.

This article will explore three organizational models that can transform the financial close – outsourcing, shared service centers (SSCs), and strategic reorganization – along with insights and implementation considerations for finance leaders looking for ways to create a more efficient financial close while maintaining proper accounting controls.

The Concept of Organizational Design

In previous articles, we examined how automation and process redesign can shorten accounting close cycles. This final installment focuses on organizational design – the people dimension. Even the most advanced systems can fail if roles and responsibilities are unclear, fragmented, or if accountability is lacking.

Finance leaders can rethink traditional structures to address:

- Duplicated efforts across business units.
- Limited expertise in more specialized areas.
- Resource bottlenecks during the financial close period.

Organizational redesign is not just about cost, it’s about creating a finance function that is strategic, scalable, and agile enough to handle curveballs that may come about during a financial close process without jeopardizing financial controls or deadlines.

Why Organizational Design Matters

Traditional finance models often rely on siloed teams and manual handoffs, creating inefficiencies and compliance risks. Organizational redesign can result in scalability to handle peak workloads, specialization for complex reporting requirements, and consistency in accounting operations across the entire organization.

Creating an optimized finance organization operating model can have positive impacts on the close cycle. Benefits include reducing the financial close process – potentially resulting in more timely financial information, improving accuracy of the financial records, and facilitating compliance with rules, regulations, and expectations.

Additionally, an enhanced finance organization can help improve employee engagement through clarity of roles and responsibilities as well as the opportunity to grow and develop within the organization.

Three Models to Consider

1. Outsourcing

Outsourcing is no longer simply a way to cut costs – it has become a strategic lever for finance organizations to achieve efficiency. There are several benefits outsourcing arrangements can produce.

It can often be difficult to find specialized experience in areas such as statutory reporting or specific software. Outsourcing certain functions can eliminate the stress of looking for an employee that has specific experience or knowledge.

Further, outsourcing can create the ability to scale during peak periods without the expense increase of additional headcount. With many outsourcing arrangements, the provider of services will provide predictable costs using a fixed-fee arrangement. This allows for expense planning and management.

The decision to outsource accounting operations does not come without risks. First, data security and compliance can be of the utmost concern. Accounting leaders considering outsourcing are often apprehensive about security and want to ensure their data has the

There are many options to consider when choosing an outsource provider and when evaluating the right fit: it's important to consider regions with cultural alignment and strong talent pools. This isn't always obvious, but as the evaluation process unfolds these considerations can make or break the success of the outsourcing arrangement.

most protection possible. Companies can mitigate this risk by creating strong governance and detailed service level agreements.

Another risk to outsourcing is cultural alignment challenges. Many outsourcing providers are in other countries where culture and even sometimes language can be challenging. If the company outsources abroad, culture and language challenges can often be managed with onboarding and clear communication protocols.

In addition, many outsourcing firms in Asia will adjust the schedules of the individuals serving the client in order to be available for more core office hours.

Pros and Cons of Outsourcing

Pros

- Cost efficiency
- Access to expertise
- Scalability

Cons

- Potential loss of control
- Dependency on vendor
- Data security risks

Consider Regional Options

An option within outsourcing is “near-sourcing.” The concept of nearsourcing shifts work to lower-cost regions within similar time zones.

Many companies prefer their work to be performed within the United States because it can provide true cost savings without sacrificing real-time collaboration. Organizations often find that communication is improved compared to offshore models – which are often in different time zones.

Another huge benefit for nearsourcing is it creates the ability for companies to access regional talent pools for specialized skills. If there is a specific skillset that is desired, opening the options to regional talent can allow for organizational agility without introducing global complexities.

There are many options to consider when choosing an outsource provider and when evaluating the right fit: it's important to consider regions with cultural alignment and strong talent pools. This isn't always obvious, but as the evaluation process unfolds, these considerations can make or break the success of the outsourcing arrangement.

2. Shared Service Centers (SSCs)

An SSC is a centralized unit within an organization responsible for executing specific operational tasks across a variety of business functions. Areas such as accounting, human resources, IT, and procurement can often find the ability to streamline processes to establish cost efficiencies and time savings. An SSC serves as a dedicated point of service that brings together the right resources and skills to support an entire organization.

Upon centralizing finance operations, the shared service can deliver many benefits. For starters, standardization of processes and policies go a long way in helping an organization find efficiencies and reduce key person risk. Standardization also helps leaders identify efficient ways to perform a certain task and allows for ease of movement of resources from one function to the next.

Second, an SSC can lead to many efficiencies by reducing duplication of tasks and improving visibility when certain tasks are being completed. Anecdotally, when leading the movement of certain financial tasks into a shared service environment, we identified several processes that were duplicative in nature, and processes that were no longer necessary.

Finance organizations that have existed for a long time risk wasted efforts for processes designed at a different time, when the process made sense. Migrating finance functions into a centralized environment gives leaders visibility to make these types of observations.

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Finally, an SSC helps an organization achieve more scalability for growth. Whether an organization is interested in growing through acquisition, organically, or globally, the ability to scale finance functions is imperative to the success of any growth measure an organization undertakes.

3. Strategic Reorganization

A final consideration when it comes to the people aspect of transforming a finance organization is strategic reorganization. This aligns roles with business priorities and helps create centers of excellence and a reduction in handoffs.

There are benefits to strategic reorganization, including role clarity (which can accelerate decision making and flexible staffing models, creating the ability to be agile upon a merger), system upgrade, or other major changes for an organization.

Analyzing your organizational design for the consideration of a reorganization can provide valuable insights that might not generally be obvious without looking at the organization through this lens.

A critical factor to a successful strategic reorganization is change management. Employees need to know what

to expect, when to expect it, and the rationale behind the change. A solid change management plan with communication, training, and stakeholder engagement can facilitate a successful reorganization.

The Future of Finance

As we wrap up this series of articles related to finance transformation, we would be remiss if we didn't identify some recent trends adjusting how we see the future of finance.

- A hybrid delivery model combining outsourcing and shared services can help provide organizations with more flexibility.
- AI-driven close is introducing machine learning for anomaly detection and predictive analytics, improving the quality of financial reporting along with stronger, more efficient processes.
- Technology accelerates processes, but people drive outcomes. Finance professionals should be empowered to focus on strategic activities through upskilling, cultural alignment, and leadership commitment.

All of these are imperative components to any impactful finance transformation.



Creating an optimized finance organization operating model can have positive impacts on the close cycle. Benefits include reducing the financial close process – potentially resulting in more timely financial information, improving accuracy of the financial records, and facilitating compliance with rules, regulations, and expectations.



For more information on organizational design or outsourcing in Connecticut, contact Kelly Harper at kelly.harper@CLAconnect.com or 860-221-3060.

The information contained herein is general in nature and is not intended, and should not be construed, as legal, accounting, investment, or tax advice or opinion provided by CliftonLarsonAllen LLP (CLA) to the reader. For more information, visit CLAconnect.com.

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CTCPA Women's Awards

Tuesday, January 20, 2026 • TPC River Highlands, Cromwell • 7:30-10:30 a.m.

Featuring Event Speakers:



Emcee

Renee DiNino
Director of Community Affairs
at WFSB Channel 3



Panelist

Melissa Ferrucci, CPA
Office Managing Partner,
Connecticut Offices
at CohnReznick



Panelist

Susan Martinelli
Partner – Assurance Services
and Hartford Office Leader
at RSM US LLP



Panelist

Danielle Wellington, CPA, CIA
Accounting Manager
at Pratt & Whitney

Member price: \$60 • Nonmember price: \$70 • Registration: www.ctcpas.org/CTCPAWomen

The seventh annual CTCPA Women's Awards program returns to the beautiful TPC River Highlands on Tuesday, January 20, 2026 to recognize the many contributions female CPAs and accounting professionals are making in Connecticut.

This year, 15 outstanding women will be honored in three categories:

- Experienced Leaders
- Emerging Leaders
- Aspiring CPAs

Renowned WFSB Channel 3 personality **Renee DiNino** returns to lead us in the festivities, which will include an engaging panel discussion with accomplished female leaders in accounting and finance, who will share their career insights, experiences, and perspectives on the evolving landscape of the profession:

- **Melissa Ferrucci, CPA**
Office Managing Partner,
Connecticut Offices at CohnReznick
- **Susan Martinelli**
Partner – Assurance Services and Hartford
Office Leader at RSM US LLP
- **Danielle Wellington, CPA, CIA**
Accounting Manager at Pratt & Whitney

Be sure to reserve your place to join us!

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Meet this year's honorees on the following pages >>

Experienced Leader



Laura J. Clark, CPA, CFE

Risk & Regulatory Consulting, LLC (an affiliate of RSM)

As a Director at Risk & Regulatory Consulting, LLC, Laura serves as a trusted advisor to the insurance regulatory community. She leads client service teams in conducting financial examinations of insurers, with a focus on assessing solvency risks. In addition, Laura plays a key role in delivering training programs to regulatory clients.

What inspired you to pursue the CPA career path?

I've always had a strong interest in math, which led my high school advisor to suggest accounting as a college major. As I explored the field, I was drawn to the variety and complexity of the work. That inspired me to pursue a career in accounting, and it's proven to be both rewarding and intellectually engaging.

What professional accomplishment are you most proud of?

I am proud of earning both my CPA and CFE designations, which have helped me grow professionally at PwC and now at RRC. I am also grateful for the opportunity to work with talented teams who have taught me valuable skills beyond financial auditing – skills I now pass on to junior colleagues, helping them develop and succeed in their own careers.

What is your next major goal?

I look forward to exploring expanded leadership responsibilities at RRC and to playing a more active role in guiding and supporting our team's continued success.

What is your favorite thing to do outside of work?

I enjoy spending time with my family, whether it be my children's sporting events, family vacations, or just relaxing at home together watching any number of legal or crime drama shows.

Congratulations, Laura Clark



RSM



RSM is pleased to recognize Laura Clark as a CTCPA Experienced Leader Award recipient and to congratulate all of the other distinguished women.

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Experienced Leader



Shari Elias, CPA

Beers, Hamerman, Cohen & Burger, P.C.

As a Partner at Beers, Hamerman, Cohen & Burger, Shari specializes in tax services, providing clients with strategic consulting, planning, and compliance guidance. Beyond client work, she is deeply committed to supporting the growth and success of her team and the firm. She strives to foster collaboration, mentor emerging professionals, and contribute to an environment where everyone can thrive both personally and professionally.

What inspired you to pursue the CPA career path?

My interest in accounting began in high school, when I took my first accounting class and discovered how much I enjoyed the logic and structure of the subject. Encouraged by my father, I decided to pursue a degree in accounting and began working for a small CPA firm after college. That early experience confirmed my passion for the profession and set me on the path toward a rewarding and dynamic career as a CPA.

What professional accomplishment are you most proud of?

I am most proud of becoming one of the first female equity partners at Beers, Hamerman, Cohen & Burger, alongside two other accomplished women. This milestone represents not only a personal achievement, but also meaningful progress toward greater representation and leadership opportunities for women in our firm and within the accounting profession.

What is your next major goal?

My next major goal is to contribute to the continued growth and success of Beers, Hamerman, Cohen & Burger. I am passionate about helping the firm expand its client relationships, strengthen its culture of excellence, and support the next generation of professionals as they develop their skills and leadership potential.

What is your favorite thing to do outside of work?

Outside of work, I love spending time with my family, golfing, playing pickleball, reading, and traveling. These activities help me recharge, stay balanced, and bring fresh energy and perspective to my professional life.

Experienced Leader



Robyn Hunter

PricewaterhouseCoopers LLP (PwC)

Robyn is an Audit Partner at PwC, where she provides audit and accounting services primarily to aerospace and defense, industrial manufacturing, and technology companies in the public and private sectors. Within this role, she works with clients of varying sizes within the Northeast, ranging from some of PwC's largest global clients to private companies contemplating a future transaction in the capital markets.

What inspired you to pursue the CPA career path?

When I was in high school, my dad suggested that I take accounting as an elective my sophomore year. I had an amazing teacher who made learning the subject fun. I can still hear him today – “You’ve got to have a debit, you’ve got to have a credit!” I still see Mr. Smith from time to time today, and I am very thankful for him (and my dad for pushing me!).

What professional accomplishment are you most proud of?

There are many milestones throughout my career that have been building blocks for me, including passing the CPA Exam, earning my first promotion, celebrating a team member I coached earning their first promotion, etc. Most recently, I vividly remember the day I was admitted to the

PwC partnership and sharing that professional achievement with my husband and two boys. I have always told them that they are my rocks, and I wouldn't be as successful without their continued support.

What is your next major goal?

I love working with clients. My goal is to find new opportunities to work on interesting projects where I can bring my experience to help solve challenging problems.

What is your favorite thing to do outside of work?

I love spending time with my husband on the sidelines watching my two boys (ages 13 and 11) play baseball. When the weekends are free of baseball, you will find me on the golf course with my family or out for a run.



Experienced Leader

Amanda Jagello, CPA Whittlesey, PC

Amanda is a Senior Assurance Manager at Whittlesey, where she specializes in audits for nonprofit organizations and credit unions. She also serves as a member of the firm's Quality Control Program, helping to uphold the highest standards of excellence across the assurance practice. Beyond client work, she finds great fulfillment in mentoring staff, helping them grow in their technical knowledge and confidence as professionals.

What inspired you to pursue the CPA career path?

"Donuts with Dad" was a Saturday tradition when I was young. My dad was a CPA and a tax partner, and I'd occasionally go with him to work on weekends. There would be a platter of donuts for breakfast and KFC for lunch. These simple moments made a lasting impression. In high school, I took my first accounting class, and everything just clicked. My dad and I bonded over debits and credits, and although he later proved far more helpful with tax software than with my audit questions, those early experiences sparked my love for the profession and the pride that comes with being a CPA.

What professional accomplishment are you most proud of?

I am most proud of passing the CPA Exam. So many people told me, "If I can do it, you can too," but it wasn't until I opened that envelope – hands shaking, heart racing – and saw that I had passed, that it truly sank in. I remember sitting on the floor, crying tears of relief and joy. It was a defining moment and proof that persistence pays off. To this day, I remind others pursuing their CPA license that if I could do it, they can too.

What is your next major goal?

My next major goal, as I continue to kick cancer in the you-know-what, is to return to the office and see all my coworkers in person. In an instant, my life changed forever. Now, it's one day, one treatment at a time – a very different rhythm for someone who has always been a planner. This journey has taught me to slow down, appreciate the present, and focus on what truly matters. I look forward to the day I can walk back into the office, healthy and strong, surrounded by the people who have supported me every step of the way.

What is your favorite thing to do outside of work?

I absolutely love watching my daughter play volleyball and work her magic at the net. I never realized how exciting the game could be until I started cheering her on from the sidelines. Now that her senior year is here, I'm soaking in every moment, capturing photos of the team in action and sharing them afterward. Seeing the players' faces light up when they see those photos reminds me how important it is to celebrate life's small joys. Those moments – the laughter, the teamwork, the shared pride – mean everything.

Hear Inspiration and Insight in Our Awardee Video Series



We asked our honorees what advice they would give their younger selves, what brings them joy in their careers, and why our aspiring CPA awardees are pursuing the CPA designation.

Their inspiring video responses will premiere at the January 20 event and will then be available to view and share at www.ctcpas.org/CTCPAWomen.

Experienced Leader



Kathleen E. McKeon, CPA

Gitlin & Company, LLC

As a Partner at Gitlin & Company, LLC, Kathleen works with a variety of clients providing a diverse range of tax and accounting services. She is also responsible for the firm's tax season internship program.

What inspired you to pursue the CPA career path?

Initially, my interest was psychology. I wanted to help people solve problems. With the idea of one day being self-employed, I decided to take a few business classes, which developed my interest in accounting and a course study change to accounting. On a similar scale, providing accounting services for clients is essentially helping them solve problems.

What professional accomplishment are you most proud of?

I am most proud of becoming a CPA. I did not do well on my first attempt at the CPA Exam and there was a point in time where I truly thought I would not become a CPA. I came to realize I am a hands-on learner and what I needed was to work in the profession to fully understand the knowledge being tested on the exams. I am grateful I did not give up.

What is your next major goal?

My next major goal is to become a Certified Valuation Analyst (CVA) so that I can offer business valuation services. I am currently in the process of obtaining my CVA certification.

What is your favorite thing to do outside of work?

I enjoy the challenge of weightlifting and am grateful for all the mental toughness I have developed as a result. There is a great feeling of accomplishment in knowing I lifted a weight that my brain initially told me I could not lift.

Experienced Leader



Dawn Meeker, CPA

CBIZ, Inc.

Dawn is a Managing Director at CBIZ, Inc. She leads the New England Outsourced Accounting Solutions team that helps clients with their day-to-day accounting needs while building strong, lasting relationships. Her role allows her to guide others, find creative solutions, and see the positive impact of her work firsthand.

What inspired you to pursue the CPA career path?

I've always been drawn to numbers and how they tell a story. Early in my career, I realized accounting was more than spreadsheets; it was about helping people and businesses succeed. That combination of purpose and challenge is what inspired me to become a CPA.

What professional accomplishment are you most proud of?

I'm proud of the growth I've experienced, learning to speak up with confidence and lead with empathy. Mentoring others and watching them find their own confidence has been one of the most rewarding parts of my career.

What is your next major goal?

My goal is to keep growing as a leader and continue empowering others to reach their potential. I want to stay open to new opportunities that challenge me and allow me to make a meaningful difference in the profession.

What is your favorite thing to do outside of work?

Outside of work, I love traveling, staying active, and enjoying time with my family and friends.



Experienced Leader

Mary-Jean K. Parnell, CPA, CCA

SRC, Certified Public Accountants, P.C.

Mary-Jean is a Partner at SRC, Certified Public Accountants, P.C., providing both tax and assurance work to a vast array of industries. In addition to serving her clients, she currently serves as the partner in charge of the firm's System of Quality Management and is responsible for developing and monitoring the firm's policies and procedures for the accounting and auditing practice.

What inspired you to pursue the CPA career path?

I have always liked math and numbers. I took my first accounting course in high school and decided then that would be my focus. I grew to enjoy public accounting while working in a local firm, where the work was varied and always changing, and where I built client relationships – some of which have lasted more than 40 years.

What professional accomplishment are you most proud of?

My proudest professional achievement would have to be becoming a partner. After working reduced hours for 20 years starting in the early '90s to raise my family, I returned to full-time work and was soon thereafter asked to join the partnership.

What is your next major goal?

As I prepare for the conclusion of my CPA career, my priority is to successfully transfer my expertise to the firm's next generation of leaders, thereby ensuring the enduring legacy and continuity of our practice.

What is your favorite thing to do outside of work?

I enjoy hiking, especially in the White Mountains of New Hampshire, and spending time with my grandsons.



Experienced Leader

Guergana Rangatcheva, CPA

Bradley, Foster & Sargent, Inc.

Guergana is the CFO at Bradley, Foster & Sargent, where she oversees the firm's finance, taxation, treasury, and human resources functions. With more than 20 years of experience in financial leadership and public accounting, she has guided organizations across industries in audit, tax, budgeting, and financial analysis. An active community leader, Guergana serves as a board member of several not-for-profit organizations.

What inspired you to pursue the CPA career path?

I was always good at problem solving and learning complex material, so I decided to get a degree in accounting and sit for the CPA Exam. I wanted to pursue a career in audit and grow my skill set as I loved the concept of auditing. When I look back on my career progression, the things that were most rewarding were the great people I worked with, my terrific mentors (if you have an opportunity to be mentored, lean into it), and learning by doing things outside of my comfort zone.

What professional accomplishment are you most proud of?

My proudest professional accomplishment was graduating from college with honors while working full time. It taught

me the importance of having goals and pushing myself to go further.

What is your next major goal?

My next major goal is to be an advocate for the CPA career profession and help strengthen the talent pipeline. The more we talk about the profession and its opportunities and challenges, the more educated students and others will be on how they can build fulfilling and respected careers.

What is your favorite thing to do outside of work?

I enjoy spending time with my family and volunteering for not-for-profit organizations.

Congratulations Guergana

Bradley, Foster & Sargent is proud to congratulate Guergana Rangatcheva and all Connecticut CPA Women's Award recipients!

Guergana's dedication to our firm, her colleagues, and the community reflect the the core values and traditions that BFS upholds.



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Experienced Leader



Sarah A. Treese, CPA

PwC US Tax LLP

Sarah is a Tax Partner with PwC Hartford, specializing in income tax compliance, consulting, and planning for both private and SEC clients. She is a trusted advisor to clients and a dedicated community leader.

What inspired you to pursue the CPA career path?

My high school accounting teacher really inspired me by making accounting interesting and easy to understand. I've always enjoyed solving problems, so pursuing a career as a CPA felt like a great fit. It lets me use my problem-solving skills to help clients solve their complex tax issues.

What professional accomplishment are you most proud of?

I'm proud to lead PwC Hartford's Community Service Committee, where I help engage hundreds of employees in volunteerism and philanthropy that benefit Greater Hartford. As Board Chair, I successfully oversaw the merger of Mercy Housing and Shelter with My Sisters' Place and continue to support the organization as a Finance Committee member. I also serve as a Trustee and Finance Chair for the Connecti-

cut Science Center, working to promote STEM education for thousands of children and families.

What is your next major goal?

I am excited to continue to grow and expand my leadership roles within PwC both locally and nationally and hope to one day serve as the Office Managing Partner of the PwC Hartford office, where I can continue to support our clients and build the next generation of CPAs.

What is your favorite thing to do outside of work?

I love spending time with my family, whether it's taking family trips, cheering for my boys at sporting events, or simply relaxing at home. I also enjoy getting lost in a true-crime podcast while taking walks with our dog, Randall.

Experienced Leader



Mary K. Wisenski, CPA

Fiondella, Milone & LaSaracina LLP

Mary is a Partner at Fiondella, Milone & LaSaracina LLP (FML) in the assurance and advisory services department. She has experience across industries including manufacturing, biotechnology, technology, and services. One of Mary's specialties is audits of early-stage companies and the unique issues they face. Mary also helps to lead her department's education initiatives for the professional staff and co-chairs the firm's Women's Group.

What inspired you to pursue the CPA career path?

My dad was a big influence here. I was initially pursuing a science degree in college and quickly realized it wasn't for me. My dad, who was a CPA himself, encouraged me to try accounting. I did and loved the material. The thought of "auditing" intrigued me, and here I am!

What professional accomplishment are you most proud of?

I've had some great successes along my career path, but I'd have to say I'm most proud of becoming a partner at FML. It was a dream to be a partner one day, and I'm thrilled to be a partner alongside some amazing colleagues.

What is your next major goal?

Right now, I have two goals. One is business development focused, where I am continuing to grow my practice by fostering new relationships that turn into opportunities and eventually new clients. The second goal is to focus on education initiatives by building learning paths for our professional staff.

What is your favorite thing to do outside of work?

In my free time, I enjoy getting outside for hikes and walks enjoying the beautiful weather in each season. In 2025, my family and I enjoyed some hikes in the Smoky Mountains and the White Mountains. Just beautiful!

Emerging Leader



Courtney Miller CLA (CliftonLarsonAllen)

As a Manager in CLA's West Hartford office, Courtney provides audit services to a variety of nonprofit and health care organizations. She is dedicated to delivering high-quality services and building strong client relationships.

What inspired you to pursue the CPA career path?

From an early age, I developed a strong interest in numbers and analytical thinking. As I explored career options, I was drawn to the idea of combining my passion for business with a meaningful way to serve others. While many of my peers pursued roles in social services, I found that accounting – particularly within the nonprofit sector – offered a unique opportunity to apply my skills in a way that supports mission-driven organizations and contributes to the well-being of my community.

What professional accomplishment are you most proud of?

The accomplishment that stands out most in my career is being able to serve on the Board of Directors for Interval House. My time on the board has broadened my understanding of the critical services they provide and allowed me to contribute my professional skills to further their mission. Over the past year,

I have gained invaluable insight into nonprofit management, advocacy, and the importance of community involvement.


What is your next major goal?

Looking ahead, my primary goal is to continue growing as a manager at CLA, with an emphasis on deepening my experience in the nonprofit industry. I am dedicated to expanding our nonprofit team, mentoring younger professionals, and helping them discover their own passion and joy in accounting. By fostering growth within our team, I aim to contribute to the sustainability and impact of nonprofits in our community.

What is your favorite thing to do outside of work?

Outside of my professional commitments, I find balance and enjoyment through participation in intramural sports with CLUBWAKA CT. Playing on these teams allows me to set aside time for myself to stay active and connected with my friends.

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Emerging Leader



Caitlin Nero, CPA Whittlesey, PC

As an Assurance Manager at Whittlesey, Caitlin provides accounting and attest services with a primary focus on nonprofit organizations. She assists clients in understanding complex accounting issues, implementing strong internal controls, and ensuring compliance with GAAP, Uniform Guidance, and the State Single Audit Act. She also trains and mentors staff, creating an environment where others can grow, develop their skills, and succeed professionally.

What inspired you to pursue the CPA career path?

I don't have the typical career path. I was a mom of two when I met a CPA who taught me bookkeeping. I started providing bookkeeping services for small businesses, mostly friends and family, while staying home with my children. I fell in love with accounting and decided to go back to school to earn my Master's in Accounting.

What professional accomplishment are you most proud of?

Without a doubt, passing the CPA Exam is my proudest professional accomplishment. I began taking the exam in 2019 and finished during COVID. At the time, I was working full-time in public accounting with three young kids (aged three through eight), then homeschooling during a pandemic – need I say more? It was a challenging time and I'm incredibly grateful for everyone who supported and encouraged me along the way.

What is your next major goal?

Ultimately, I aspire to become a partner, but I recognize that there are important steps along the way. I'm focused on continuing to grow in my role, expanding my expertise, and taking on more leadership opportunities. In the meantime, I'm passionate about helping fill the CPA pipeline and changing the narrative around public accounting, encouraging more young professionals to explore the field.

What is your favorite thing to do outside of work?

Outside of work, I love spending time with my three children – Joey, Anthony, and Adele – and my friends and family. I also love to travel and explore new experiences, whether it's local culture, food, or unique activities.

Emerging Leader



Lucia Visconti, CPA CohnReznick Advisory LLC

As a Senior Tax Associate at CohnReznick, Lucia provides strategic tax planning and compliance services to clients in construction, manufacturing, and real estate. She manages complex engagements, identifies tax-saving opportunities, and ensures regulatory compliance. She also mentors junior staff and stays current on tax law changes to deliver proactive, value-driven insights that support client success.

What inspired you to pursue the CPA career path?

I wanted a profession that consistently provided me with growth opportunities and that empowered me to positively impact my community. This career path aligned with my strengths so I could maximize my contributions to the people around me.

What professional accomplishment are you most proud of?

I am extremely proud to have earned my CPA certificate. It was a rewarding pursuit that supports my overall goal of becoming a trusted advisor. It not only helped me grow my understanding of accounting standards but also my own capabilities and resilience.

What is your next major goal?

My goal, which actually led to my pursuit of CPA licensure, is to become a trusted advisor for my clients. It is exciting when I hear a partner explain a certain course of action that they suggest to their clients, the tax law behind it, and the practical application. I would like to be a part of big decisions. I want to be able to move up in my firm and eventually become a partner, where I can have a more direct impact on my clients' successes.

What is your favorite thing to do outside of work?

I love spending time outside all throughout the year. When I have time, I enjoy skiing or volleyball, depending on the season. Otherwise, a simple walk around the neighborhood is enough to reinvigorate me.

Aspiring CPA



Morgan Bielert

CBIZ, Inc.

Morgan is a Senior Associate in the assurance department at CBIZ, Inc. She works with a diverse range of clients, including nonprofit organizations, biotech companies, and manufacturing companies.

What inspired you to pursue the CPA career path?

My coworkers inspired me to pursue the CPA career path. When I began my career as an intern with Marcum LLP, I wasn't sure if becoming a CPA was the right direction for me. However, after hearing my colleagues share their experiences and describe the opportunities the CPA designation has provided them, I was motivated to pursue it myself. Since then, I've received unwavering support from all of my colleagues.

What professional accomplishment are you most proud of?

I am most proud of completing my Bachelor's degree in just three years and my Master's in Accounting in one additional year at Nichols College, all while interning part-time at my first

firm and holding other jobs. Balancing these commitments was challenging, but I wouldn't have done it any other way.

What is your next major goal?

After I obtain my CPA, I would like to pursue the Certified Fraud Examiner (CFE) certification. Exploring forensic accounting has been a goal of mine since college.

What is your favorite thing to do outside of work?

Outside of work, I enjoy cooking, reading, spending time with my loved ones, and traveling. Last winter, I was able to explore Sweden for the first time and experience a traditional Swedish Christmas!

Aspiring CPA



Cynthia Calderón

CohnReznick LLP

As a Manager at CohnReznick, Cynthia leads a collaborative team delivering high quality, timely client service. She is structured and proactive – setting clear plans, coaching colleagues, and removing roadblocks so work moves forward smoothly. After an extended medical leave, returning to full-time leadership has strengthened her empathy and resilience. She aims to create an environment where people feel supported, grow their skills, and consistently achieve results together.

What inspired you to pursue the CPA career path?

I'm drawn to the CPA profession because it blends analytical rigor with service – translating numbers into decisions that help people and organizations thrive. My father's example and my mother's deep belief in education shaped that commitment. During my health setback, I studied even from the hospital. That season reaffirmed that this is my calling, and that perseverance can transform setbacks into momentum.

What professional accomplishment are you most proud of?

I'm proud of returning to work full time after 18 months on medical leave and rebuilding strong momentum with my team and clients. We met critical deadlines while supporting one another, and I modeled openness about challenges without losing focus on results. That experience reinforced that sustainable performance comes from resilience, clarity, and care – for our clients and for ourselves.

What is your next major goal?

My next major goal is to pass all four parts of the CPA Exam. I had nearly finished before credits expired during my medical leave and my father's passing. Starting again from zero is daunting and energizing. With renewed health, disciplined study, and my family's encouragement – especially my mom's – I'm committed to finishing what I started and bringing that credential to serve our clients even better.

What is your favorite thing to do outside of work?

I recharge with family and friends and long walks with my service dog, Leah Michelle. Time outdoors helps me reflect and return with fresh energy and perspective. My health journey taught me that caring for well-being isn't a detour from goals – it's what makes sustained excellence possible.

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Actis-Grande, Ronan & Co., LLC

William Saas

Saas Kirwan Associates

William Stout

University of Louisville

Francis Tirelli

Finaxstrure Associates LLC

Robert Vance

Robert A. Vance, CPA

Ralph Volpe III

Retired Partner – RSM US LLP

Patricia Walsh

Stifel Nicolaus & Co., Inc.

John Watts

John A. Watts, CPA LLC

Mark Wynnck

Weinshel, Wynnck & Associates, LLC

Michael Ziebka

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Date	Title	Course Code	Member Fee/ Nonmember Fee	CPE Hours
January				
19	The Big Beautiful Bill: Tax Reform 2025 and What's Ahead	ACP6700	\$129/\$159	4
20	The Best Federal Tax Update Course by Surgent	BFTU0120	\$299/\$424	8
20	1040 Tax Prep Automation with AI Tools	CPAX4264	\$89/\$124	2
21	Finance Business Partnering: The Essentials	AICPA405	\$349/\$419	8
22	Trump Accounts Created by OBBBA: A Comprehensive Guide for Accounting and Finance Professionals	TAC20122	\$119/\$154	2
22	Nonprofit Taxation Rules and Form 990	ACP5216	\$79/\$109	2
23	AICPA's Annual Federal Tax Update	AICPA408	\$349/\$419	8
23	Key Tax Issues Facing Business & Industry	ACP5263	\$129/\$159	4
27	Successfully Completing an Income Tax Return for a Trust or Estate – Form 1041	FM410127	\$99/\$134	2
28	Taxation of Tips and Overtime Under OBBBA	TTO20128	\$119/\$154	2
28	Seeing Beyond the Numbers: Analysis for CFOs and Controllers	CPAX4418	\$149/\$214	4
29	Tax Fundamentals of LLCs and Partnerships – Tax Staff Essentials	AICPA415	\$349/\$419	8
30	OBBBA of 2025: Individual Overview	ACP6702	\$79/\$109	2
31	Business Tax Update: Recent Developments	ACP5402	\$79/\$109	2

February

2	What's Changing in Risk Assessment	ACP5407	\$79/\$109	2
3	Written Information Security Plans	CPAX4503	\$55/\$75	1
4	2025 A&A Update with Technology Implementation	CPAX4530	\$149/\$214	4
5	Lessee and Lessor Accounting	AICPA422	\$125/\$149	2
6	Generative AI Strategy for Accountants	CPAX4583	\$89/\$124	2
9	Intermediate Individual Taxation – Tax Staff Essentials	AICPA429	\$349/\$419	8
10	Surgent's Basis Shifting: Final Regulations	BSR40210	\$159/\$224	4
12	Client Advisory Services (CAS): A Guide to the Variety of Offerings Professionals Can Provide	CAS20212	\$99/\$134	2
13	Accounting for Digital Assets Under U.S. GAAP: Specialized Accounting, Fair Value, and Stablecoins	AICPA437	\$99/\$118	1.5
16	The Original Secure Act and Secure Act 2.0 Retirement Planning Strategies	ACP5695	\$129/\$159	4
17	Preparing and Reviewing Workpapers for Higher Quality Audits	ACP5711	\$129/\$159	4
19	Improving Your Profits: Identifying Cost-Cutting Opportunities	IYP20219	\$99/\$134	2
20	Accounting for Digital Assets Under U.S. GAAP: Crypto Lending and Borrowing	AICPA449	\$75/\$89	1
23	2025 Tax Legislation: The One Big Beautiful Bill (OBBBA)	ACP6708	\$79/\$109	2.2
24	Ethical Considerations of the New AICPA SSTS Rules	CPAX4876	\$89/\$124	2
26	Defining Where and Why Internal Controls Are Needed	CPAX4934	\$89/\$124	2
27	The Controller Function – Strategic and Annual Planning	ACP5972	\$39/\$59	1.2

March

2	Assessing the Risk of Fraud in a Financial Statement Audit	ARF80302	\$279/\$404	8
3	Hands-On Tax Return Workshop – Partnerships & LLCs (Form 1065)	ACP6035	\$300/\$400	8
4	2025 Annual Update for Accountants & Auditors	ACP6076	\$189/\$219	6
5	Surgent's Update on the SECURE 2.0 Act	SEC20305	\$99/\$134	2
6	Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations	AICPA465	\$225/\$269	4
9	MBAExpress: Emotional Intelligence – V 2.0	AICPA466	\$75/\$89	1
10	K2's Better Productivity Through Artificial Intelligence	ACP6183	\$129/\$159	4
11	Capital Assets: Basis and Taxation for Financial Professionals	CAB20311	\$119/\$154	2
12	Avoiding the Most Misapplied Audit Concepts	CPAX5153	\$239/\$364	8
13	Enterprise-Wide Risk Management in Accounting and Finance	CPAX5181	\$149/\$214	4
16	Ethics: Avoiding the Slippery Slope of Ethical Pressures	AICPA477	\$225/\$269	4
16	The Big Beautiful Bill: Tax Reform 2025 and What's Ahead	ACP6712	\$129/\$159	4



Welcome, New Members!

We're pleased to welcome the following individuals to CTCPA membership:

New Certified Members

Katia Souza

Ryan Ciesla

American Nuclear Insurers

Jenna Krzesicki

Fuss & O'Neill, Inc.

Sarah Treese

PwC

Kyle Nelson

Noah M. Rifkin

Noah M. Rifkin, CPA, PC

Robyn Hunter

PwC

Shahzad J. Khawaja

Jeanne Galvin, CPA

Derik W. Jahn

Francis S. Infurchia & Company, LLC

Mustafa A. Mufti

Deloitte

Hunter Prendergast

John T. Caty

KPMG

Jeffrey Mellon

Gino Ciarimboli

Howmet Aerospace

Cheryl A. Heller

Gregory Nowling

Comer, Nowling and Associates, PC

Megan M. Zebrowski

Janelle M. Jones

Moses Tax Group, P.C.

New Professional Colleagues

Bill DePalma

Compass IT Compliance

Jacob James

John F Korn CPA LLC

Alex W. Carl

Catherine Hester

IceBox Tax, LLC

Joseph O. Oyewale

Alarm New England
d.b.a. SSSH 3, Inc.

Matthew Tardiff

Morgan Bielert

CBIZ

Ryan Sullivan

PwC

William R. McKinley

Whittlesey

Andrew Inman

Hallisey & D'Agostino, LLP

Alex Starr

Shane, Navratil & Co.

Barbara K. Stubbs

Claudia I. Wilkins

Clavette & Company, LLC

Argero Hamilakis

Clavette & Company, LLC

Louis Raffone III

Martin Zajac

Santoro CPA

Michael Rotondo

CT State Middlesex

Robert N. Thomas

Michael Aloï

Summit Financial, LLC

Nicholas Wegman

Francis S. Infurchia & Company, LLC

Scott Jezierny

Capossela, Cohen, LLC

James Maravelis

Masotti & Masotti

William Richard

EisnerAmper LLP

Frank Kolovic

CaptiveReIns

In Memoriam



Dana R. (Rick) Richardson, a member since September 3, 1999, passed away on November 17, 2025. He was most

recently the managing partner of Richardson Media & Technologies, LLC, a multi-media and strategic technology consulting company. Prior to forming that company, he had a 28+ year career with Ernst & Young, the last twelve years of which he served as the firm's National Director of Technology. After EY, he spent decades as a speaker and consultant on accounting technologies, and received several awards and emeritus distinctions.



Member News

Send your news to **Caitlin Bailey O’Neill** at caitlinb@ctcpas.org.



Jeffrey Solomon

Jeffrey Solomon, Managing Director and Audit Practice Leader at CBIZ, was selected as one of the first-ever inductees to the Cystic Fibrosis Foundation Connecticut’s Finest Hall of Fame. Jeff is a member of the organization’s Connecticut’s Finest Volunteer Leadership Team, was a New Haven’s Finest honoree in 2013, and has been involved with the Cystic Fibrosis Foundation for almost 15 years.

The Innovative CPA Group (ICG) announced its merger with **Whittaker & Saucier, CPAs, PA**, of Venice, Florida. The combined firm will operate under the name Innovative CPA Group of Florida, LLC, creating a unified team to deliver an expanded suite of accounting, tax, audit, advisory, and consulting services. In addition to the Venice, Florida office, ICG operates from offices across Connecticut including Bethel, Bridgeport, Hamden, Norwalk, and its headquarters in Shelton.

Whittlesey has earned ClearlyRated’s 2025 Best of Accounting Award for service excellence. The award is based entirely on client feedback and recognizes firms that consistently deliver exceptional client experience. Whittlesey received a Net Promoter Score more than two times the industry’s average.



Gene Turley of CPA Consulting Services in Manchester joined **Marie Kulesza**, Professor and Accounting Department Chair at Central Connecticut State University, and **Tara Vakil**, Assistant Professor of Accounting at the University of Connecticut, for a career exploration panel at Manchester High School. The event gave about 30 students – mostly sophomores and accounting class participants – a chance to hear firsthand about career paths in accounting and the skills that lead to success.



CTCPA Executive Director and CEO **Bonnie Stewart** and others were featured on the cover of the *Hartford Business Journal* on October 6, 2025 for the article “CT revises CPA requirements for the first time in 25 years to address accounting workforce shortage.” The article covered the regulatory changes that were officially effective October 1.

The piece included insight from:

- **Eliot Bassin**, Partner in the Tax and Advisory Services Practice at Fiondella, Milone & LaSaracina LLP (FML),
- **Drew Andrews**, CEO and Managing Partner of Whittlesey, and
- **George Plesko**, Professor and Accounting Department Head at the University of Connecticut.



Eliot Bassin



Drew Andrews



George Plesko

The same day, the *Hartford Business Journal* also shared the news that the CTCPA would be relocating from Rocky Hill to a smaller office in Glastonbury in 2026.

Forbes released its list of America’s Top 200 CPAs 2025. According to *Forbes* Editor Steel Rose, “This second-annual list of America’s Top 200 CPAs includes those from assorted specializations and from across the country. The CPAs selected have all distinguished themselves through success at their firms, the advancement of their profession, and by giving back to their communities.”

This list featured CTCPA members **Stacy Farber** (Assurance Partner, Whittlesey), **Katherine Patnaude** (Partner, PKF O’Connor Davies), and **Vanessa Rossitto** (Principal, CLA (CliftonLarsonAllen)).



Stacy Farber



Katherine Patnaude



Vanessa Rossitto



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