

2010
Issue II

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PKF NA To the Rescue - Across the Globe

International activity in North America has been at a fever pitch. It is gratifying to see so many members collaborating with global PKF colleagues in response to client needs.

When Vice President of International Business **Job Dieleman** visits member firms, he frequently talks about the collaborative culture of PKF and how response times are getting shorter and shorter. Here's an example: Job recently received a request from **Ed Psaltis**, partner with **PKF Australia**, to coordinate a response from five PKF NA firms to an Australian client with real estate investments in the U.S. Ed described the rapid-fire responses from the PKF NA members as the fastest he has ever

experienced – and Ed has been with both BDO and Ernst & Young.

As another example, one of our newest PKF NA members, **Wipfli LLP**, has a significant client that recently decided to use PKF as the auditor for their Singapore location. **Scott Nelson**, partner at Wipfli, stated that the PKF firm in Singapore differentiated themselves against two competitors by their quick and thorough responses. As a result of this win, PKF now has the opportunity to win work in other countries where the client is active.

EisnerAmper LLP has had several positive experiences with PKF collaboration since joining

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Improve Skills with New PKF Courses

Are the conversations you're not holding, or not holding well, preventing your firm from acting cohesively? Is ineffective writing keeping your audience from clearly understanding and acting upon your message? Are lackluster presentations hampering your lead generation and business development success?

PKF North America is rolling out a series of communications courses in 2010 and 2011 to address each of these concerns.

Presentation Skills prepares participants to deliver organized and effective presentations with confidence. During this course, each participant delivers brief videotaped presentations that are reviewed and critiqued by the instructor, **EisnerAmper LLP** Principal-in-Charge of Marketing **Michael Wolff**. This course is appropriate for all associates and awards 9 CPE credits.

PKF NA also has partnered with the **Degania Group** to bring you a new **business writing** skills course – specifically designed for the accounting industry at two levels: staff/supervisor and manager/partner. These two four-hour courses will improve the participants' ability to achieve communication objectives.

Writing skills are as important to professional success as technical skills, since writing style, semantics, tone, clarity and organization affect how the audience perceives and acts upon a message. Participants learn to write with greater precision, present the reader with clear information and direction, think critically about the document's purpose and create the appropriate tone, among other objectives. This course awards 4.5 CPE credits.

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Membership provides access to the resources of our members, increasing our ability to compete more effectively.

Quarterly

The *Quarterly*, published by PKF North America, is intended as a means of communicating information exclusively within the PKF North America membership. Your contributions are welcome. Please send articles and news items by mail, facsimile (770-279-4566) or e-mail to: jcarter@pkfna.org

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I hope you all are experiencing some signs of a slow but steady recovery taking hold.

We continue to operate in an environment of change; the continued challenges of our economy, the transition of firm leadership as the baby boomer generation approaches retirement, data privacy, and financial reporting and regulatory reform, convergence with international standards and the ongoing debate on the benefits of “Network” versus “Association” membership. Our membership in PKFNA provides each of us access to the resources of our members, increasing our ability to compete more effectively in these changing times.

Change also provides opportunities for our organization to demonstrate new ways that we can fulfill our mission to assist our members to 1) improve profitability, 2) remain independent and 3) get to the next level. We began 2010 with a new association name, a new look and feel on our website (which will continue to evolve) and we continually work to improve membership benefits and add value.

The Niche Program is one such benefit intended to improve member profitability. Statistics and experience show that when firms niche, they grow. PKF NA has committed to helping members specialize in the areas of construction, healthcare and manufacturing and distribution (with additional focus areas to come in 2011). You read about this new program in the previous version of the *Quarterly* and now, resources such as ghostwritten articles, white papers, PowerPoints, niche-specific content and more have been delivered (with more to come). If your firm is already participating in these innovative programs, you’re no-doubt already seeing the benefit. If not, don’t miss out!

To meet our mission of helping members get to the next level, it is essential that we insure our membership covers the full spectrum of size and breadth of firms. The introduction of several new members adds considerable value to our membership in terms of resources and will help all members compete in this ever-evolving market.

As your board chair, I encourage you to boost the value of all of our memberships with involvement in conferences, niche fly-ins, trainings and being involved in committees and advisory boards. Participation is not only a benefit, it is a responsibility, as that participation provides one of the key values of membership, the sharing of knowledge and experiences among peers who face similar challenges.

Thank you for your continued involvement and your willingness to share among this great group of firms.

Dan Devasto
Chairman
PKF North America

Technology Fly-In Attendees Implement Best Practices

Managing an accounting practice takes more than just good accounting skills. With the rate of change in technology only increasing, and theft of data becoming all too common, many firms have hired dedicated teams of professional IT staff to address information security, data management and a myriad of other technology issues.

But whether your firm has these dedicated professionals or client service partners have assumed technology responsibilities, they don't have to go it alone. PKF North America's annual Technology Fly-In and Roundtable brings together IT professionals and partners-in-charge of technology for a day-and-a-half of presentations and roundtable sessions. The 2009 event attracted more than 45 attendees, who came away with valuable best practices in data security, risk assessment, mobile computing and more.

We spoke with attendees of the 2009 Technology Fly-In & Roundtable to find out what they learned that they have since implemented in their firms.

What **John Zordan**, CPA, Executive Officer with Rockford, Ill.-based **Lindgren, Callihan, Van Osdol & Co.**, heard at the fly-in just confirmed his opinion that "we can never be secure enough."

While LCV already had many security measures in place, such as encrypted laptops and requiring complex passwords, there were no security mechanisms to protect data on the USB keys

(aka, "memory sticks" or flash drives) that so many professionals are now using. Zordan, Chairman of PKF NA's Technology Committee, came back from the 2009 fly-in determined to replace those drives with encrypted ones.

Ken Lange, Director of Information Technology with Columbia, Mo.-based **Williams-Keepers LLC**, created a Technology Advisory Group after hearing from fly-in attendees about the benefits of these user groups.

"In the past, we would come at technology problems from an IT perspective rather than from a firm perspective," says Lange, a member of PKF NA's Technology Committee. "Now, we're asking the people who use the technology to make recommendations."

Not only does the firm benefit from the user's perspective on technology issues, but the advisory group members have a new appreciation for the challenges of creating these policies so they are effective and practical.

The first three recommendations made by W-K's Technology Advisory Group were: hold security awareness classes for all staff; use Leapfile for client communications and data exchange; and encrypt all hard drives. "These might sound basic, but now the group members understand *why* we need to take these steps," Lange says.


Another best practice that Lange learned at the Technology Fly-In is the importance of enforcing limits on the number of e-mails and documents re-

tained on the firm's server. During the roundtable portion of the meeting, he heard from a member "who got buy-in on enforcing limits when they showed how much it costs to store this data and the time spent on data storage and backup," Lange says.

As with most conferences, Lange and Zordan agree that the networking and sharing of best practices with fellow members is the most valuable part of the Technology Fly-In and Roundtable.

"You can ask the group whatever is on your mind – from encrypting to e-mail policies," Zordan says. "That's always been the high point. I also participate in PKF NA's monthly technology conference calls, and it's nice to put a face with the voices from those calls."

Lange describes the networking benefits this way: "We build a community of knowledge experts that can be cultivated throughout the years ahead, and not just for two days in the fall."

For information on the 2010 Technology Fly-In and Roundtable, contact Jack Charlesworth at jcharlesworth@pkfna.org. 

UPCOMING EVENTS FOR YOUR FUNCTIONAL LEADERS

[2010 Tech Fly-in and Roundtable](#)
9/20/2010
Chicago

[2010 Marketing Conference](#)
10/2/10 - 10/22/10
Boston

Spotlight on PKF Elko in Philadelphia

Elko & Associates Ltd began exploring the international arena 20 years ago. But even then, Elko's management realized they needed a solid focus and a guiding resource. They needed an organization that would enable staff and firm leaders to learn and benefit from the experience of others with expertise in international accounting.

In 2008, Elko joined **PKF North America**. Elko has been an active member in PKF North America and **PKF International**, enabling the firm to develop strong relationships with other member firms in the U.S. and beyond.

In late 2009, Elko launched a separate entity, PKF Elko & Associates (www.pkfelko.com) as part of their PKF branding initiative. Since then, the firm has noticed communication with PKF International member firms outside of the U.S. has become easier and more frequent. President **Mike Pozielli** credits many of the firm's successful relationships to **Job Dieleman**, Vice President of International Business for PKF NA. Job has been an extremely valuable resource to PKF Elko through his responsiveness, knowledge of PKF and its member firms, and his ability to facilitate introductions.

PKF Elko has worked on projects with PKF member firms in Canada, India, the UK, Australia, Germany, Italy, Brazil, Singapore, and China, among others. PKF Elko is currently working on a large special project with **PKF Sridhar & Santhanam** in India, and PKF Elko's international team members work on a continuing basis with a number of PKF firms to service multinational audit clients.

Kelly Fisher, PKF Elko's international niche leader, joined the firm in 2004 after working at a Big Four firm. She has a broad range of experiences, having practiced in both the audit and tax functions, servicing clients in a variety of industries. Kelly is a CPA, has a Masters in Taxation with a concentration in international tax, is currently studying international business law at Temple University, and will graduate in May 2011 with her J.D. Her law school experiences help the firm not only advise clients on the accounting and tax implications of their international operations, but also provide practical business advice to clients regarding cross-border transactions. In law school, Kelly had the opportunity to spend a summer in Italy, where she studied international business law, international fiscal policy, and learned about business practices throughout the European Union.

PKF Elko's other international leaders include Pozielli and **Colleen Cooke-Varallo**. Pozielli has been a driving force for the international area for the past 20 years. Cooke-Varallo, a director in the firm's audit department, focuses her attention on advising clients of the financial reporting implications of global business. She also oversees and coordinates the global audit process for the firm's multinational clients. Also a member of the firm's continuing education committee, she is currently focused on educating key members of the firm on IFRS.

In addition to the international leadership team, the firm has a number of audit and tax staff supporting the inter-



national niche. Staff members attend internal and external training sessions, where they gain international expertise needed to support the niche. While educating PKF Elko's core international team, Fisher and Cooke-Varallo also train the entire firm on international tax and accounting topics at least twice a year.

PKF Elko's ability to successfully work with other member firms is largely due to the personal relationships built at PKF conferences. Since joining PKF, Fisher, Pozielli and Cooke-Varallo, have traveled to locations such as South Africa, Shanghai, Lisbon, Washington D.C., and San Francisco for PKF International conferences. "The cooperation we get from member firms allows us to confidently pursue this work," says Pozielli when asked about the relationships he has developed within the network.

The firm is quickly becoming the "go-to" firm for international accounting expertise within the local community. PKF Elko has been receiving special projects for both inbound and outbound work, and is even used by other local firms as a consultant on international engagements. In addition to compliance engagements, these opportunities include transfer pricing studies, mergers

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Member Service

TO THE RESCUE, continued from p. 1

late last year. In July 2009, EisnerAmper was approached by the Spire Group of Morgan Stanley Smith Barney to provide a solution to address international tax withholding and reporting requirements for a publicly traded company with employees in more than 20 jurisdictions worldwide.

Brent Lipschultz and his team of professionals in EisnerAmper's Personal Wealth Advisor practice quickly organized a working group to provide a solution to present to the Spire Group.

EisnerAmper's membership in PKF International was a huge selling point for the public company, which previously used a Big Four accounting firm but became dissatisfied when it found the firm provided inconsistent advice across jurisdictions. The Spire Group immediately recognized the benefits of a middle market firm in New York with access to a strong international network. EisnerAmper responded to the challenge by soliciting participation from 20 PKF member firms.


After a test case involving PKF firms in France and Japan, the potential client was impressed with the quality and responsiveness and engaged EisnerAmper as the project coordinator in November 2009.

In another example of the power of PKF, Job coordinated a survey in over 50 countries that details how income and gains on tradeable securities are taxed in these countries. The survey was initiated by **Harold Adrion**, senior tax


ELKO SPOTLIGHT continued from p. 4
and acquisition consulting, due diligence, and other special projects.

PKF Elko also is exploring PKF International's secondment program, PKF GO. As their international client base increases, the firm welcomes the opportunity to add a member from a foreign country who will contribute a different perspective and become a valuable team resource.

Because PKF member firms have been so helpful in sharing market strategies and ideas, Pozielli knows Elko made the right decision investing in PKF membership. "We made a large commitment, but because PKF is such a valuable resource, we have been successful."

For more information on how to create or expand your international practice, please contact Job Dieleman at jdieleman@pkfna.org. 

principal at EisnerAmper LLP, who needed it to serve his hedge fund clients. This survey has become a valuable business development tool for any PKF member wanting to grow this sector, and its development was possible because all countries involved responded on a timely bases.

For a copy of this survey, or for help connecting with member firms outside of North America, contact Job Dieleman at jdieleman@pkfna.org. 


SKILLS IMPROVEMENT CONTINUED FROM P. 1

Crucial Conversations® by Vital Smarts™ and presented by **Wipfli LLP**, is a progression of three courses that can be conducted in two or two-and-a-half consecutive days:

Crucial Conversations® helps individuals, teams and firms hold effective conversations and thereby begin achieving the performance they seek. This course is targeted at all associates regardless of firm position and awards 18 CPE credits for successful completion.

When confrontations are handled poorly, they result in failed promises, missed expectations, lack of accountability and bad behavior. **Crucial Confrontations**™ helps firms improve in-the-moment, face-to-face accountability. This course is targeted at associates in the role of managing and leading others and builds on the objectives of Crucial Conversations® training. After successful completion of the course, 12 CPE credits are awarded.

Influencer™ (available in 2011) introduces participants to a powerful model that will help increase their ability to influence others without relying on formal authority. Participants will learn how to diagnose root causes behind problems, develop strategies for driving change, and identify motivating behaviors to help ensure change. Influencer is intended for associates who manage and lead others and builds on the objectives of Crucial Confrontations™. The course is worth 12 CPE credits.

For more information on these programs, contact interim VP of Human Capital, Kristen Stein at kstein@pkfna.org. 

Paying homage to the classic, *The Wizard of Oz*, **Barnes Dennig** held their 2010 State of the Firm, titled, "There's No Place like Home." The event celebrated the firm's office move with *The Wizard of Oz* as a fitting allegory of the uncertain economic times during another challenging period of history. The all-staff event included a skit by partners illustrating why "There's no place like Barnes Dennig." ■ Over 200 local contractors attended the 2010 Annual Contractor's Seminar featuring "Managing your Construction Company in a Tight Economy" presented by **Charles Vander Kooi**. The event was co-sponsored by a local bank and a law firm. ■ The "Recovery Audit Contractor Seminar" was the firm's first healthcare-centric roundtable and featured Director **Cindy Padilla** as a speaker. Fifty local healthcare providers attended the event which was co-sponsored with a local law firm and an M&A firm. ■ The **Human Capital Advisory Practice** is a new service area spearheaded by HR Director **Bill Bagley**. Bill, along with HR/Marketing Advisor **Melissa Brogan**, will be providing services to clients including: on-campus recruiting, community relations, professional development, 'employer of choice' culture enhancement, performance management, recognition/reward programs, employee relations, and retention services. ■ **Chris Perrino**, principal and director of business development, provided marketing and business development training for **Monica Harris** and **Marla Van Kooten** from **Bauerle & Company**/Denver.

Clayton & McKerverey launched a new website, www.claytonmckerverey.CN, to help Chinese businesses invest and operate in the U.S. The site, in both English and Mandarin, will help the firm identify inbound Chinese business opportunities and help PKF firms who have clients interested in starting operations in the US.

The Condon Group has packaged succession planning services as Exit Planning for Business Owners. Through PKF NA and BEI, the firm has access to marketing tools including bi-weekly e-mail newsletters, white papers, workbooks and presentations. The firm presented "Exit Strategies that Maximize Wealth" at a firm-sponsored event and at a construction industry association meeting. They have also presented to local banks. For more information about PKF NA's Center for Exit Planning Excellence, visit http://www.pkfna.org/araf/exit_planning_overview.aspx.

Dermody Burke & Brown created electronic banners a series of Thought Leadership e-mails. They are also distributing bi-monthly Niche Nuggets: easy-to-implement ideas for each niche. ■ The firm created The Bernie Award to be given to an employee recognized for exceeding the expectations of the firm. The award is in honor of former President **Bernie Corbishley**, who retired in January 2010.

Marti Asher, head of **Gilliam Coble & Moser's** not-for-profit and retirement plan audit practices, led a campaign to begin educating organizations about what it means to prepare for an initial audit of 403(b) plans. The firm partnered with the North Carolina Center for Nonprofits for a half-day presentation and discussion on best practices in accounting for NFPs.

Gorfine, Schiller & Gardyn's website features a tax blog written by **Dana L. Roe**, tax manager. ■ Recent webinars offered by the firm for clients and prospects include *Doing More with Less: Lean Process Management* and *Breaking Up Is Hard To Do: Marital Dissolution and Shareholder Oppression*.

PKF Texas has joined the world's largest Microsoft Dynamics organization, Partner Power. As a member, the firm is able to service and support existing and future multi-national Microsoft Dynamics NAV customers in more than 50 countries around the globe.

At the Western Regional Dental Convention, **Price, Kong & Co.** rolled out their Dental Practice Group's new "Service Integration Model" which includes a standardized chart of accounts, internal controls and benchmarking studies. The group is headed by **Chris Torregrossa** and is the collaborative creation of Chris and **Tony Kong**, senior partner. ■ In an affiliation agreement, PK will serve as preferred CPAs of the Arizona Contractors Association (ACA) and will receive exclusive sponsorship opportunities. The firm will share "Construction Tips of the Week" to be included in ACA's weekly e-newsletter.

Sobel & Co. are sponsors of Farleigh Dickinson University's Family Business program. They also co-sponsored a half-day nonprofit conference with William Paterson University. The firm also sponsored a program at Rutgers University, presenting the results of a survey on trends for women attorneys in New Jersey. ■ The firm has a twice-weekly marketing blog, providing marketing tips and ideas for mid-size, privately-held companies.

Tanner hosted a "Jump Start Conference" with 25 top students from Utah universities. The event featured Utah business leaders as speakers, with the goal of helping students "jump start" their careers. ■ The firm continues to benefit from being a member of PKF International. In addition to being able to access affiliate firms anywhere in the world for help, they are also able to assure prospective clients that they can take care of their needs anywhere in the world.

In line with its "People" core value, **Witt Mares** created an employee hardship loan program with a local community bank. The firm acts as guarantor, giving employees access to low-interest funding and helping them to leave other funds, such as their 401(k), untouched. ■ The firm is partnering with the Virginia Society of CPAs to develop a scholarship program in honor of **Mike Mares**, a founding partner of the firm and nationally renowned tax expert. Mike passed away in October 2009 from brain cancer at the age of 57. An endowment has been created with \$50,000 of seed money from Witt Mares. A task force comprised of representatives from Witt Mares, the VSCPA, the AICPA and Mike's closest colleagues in law and teaching are spearheading the vision, mission and components of the program, which will be a multi-year experience for chosen scholars. To contribute and for more information on the program, contact **Mary Aldrich** at maldrich@wittmares.com.

Oakbrook, Ill.-based **Wolf & Company** initiated an extensive industry niche program and revisited their core values. A survey was sent out to all employees to evaluate and rate firm characteristics. The firm then created the acronym *THRIVE* to help communicate the values to employees: Team, Honesty, Respect, Integrity, Values, and Excellence. A special logo was developed to be used on employee communications, recruiting material, the firm's intranet, and a commemorative employee gift so that *THRIVE* will remain at the forefront of business practice. Additionally, the firm re-titled and redesigned their quarterly employee newsletter *Thrive.ing* and will emphasize a core value in each issue.

Boston-based **Wolf & Company** has given a four-year grant to Stonehill College to support academic competitions in the Business Administration department. ■ **Wolf & Company, P.C.** and **Witt Mares, PLC** partnered to sell WolfPAC Integrated Risk Management to a \$2.2 billion corporate credit union based in North Carolina. The WolfPAC Channel Partner program enables PKF partners to offer WolfPAC as a value-added service to their clients. ■ **Horace Emery** and **Chris Dewees** at **Suttle & Stalnaker** helped the firm on a Massachusetts Department of Transportation bid in the middle of busy season. Although **Wolf & Company** didn't win the proposal, it was a good demonstration of the effectiveness and resources provided by PKF NA.



Member News

ANDREWS HOOPER & PAVLIK P.L.C.

Gary Climes rejoined the firm to lead the business and IT consulting services division. AHP merged with Burnside & Lang, P.C. adding partners **Mark R. Freed**, **Gwen D. Lang**, and **Daniel R. Wamhoff**. **Traci L. Moon** was promoted to partner.

BARNES, DENNIG & CO., LTD.

Heidi Yamaguchi and **Reid Schlotterbeck** were promoted to assistant team leaders; **Melissa Brogan** was promoted to HR/marketing advisor. **John Michel** joined the firm as director; **Michele McKenney**, **Ellyn Naber**, **Logan Conner**, **Jessica Harris** and **Sam Brown** joined as co-ops; **Jon Enders** joined as staff accountant and **Scott Priestle** joined as marketing associate.

BAURLE AND COMPANY, P.C.

Monica Harris joined as marketing coordinator.

BLACKBURN CHILDERS & STEAGALL, PLC

Chuck Randolph and **Rachel Squibb** were recently promoted to manager.

BROWN ARMSTRONG ACCOUNTANCY CORPORATION

Thomas Young, **Rosalva Flores**, **Connie Perez**, and **Diana Branthoover** became principals; **Brooke DeCuir** and **Sam Newland** were promoted to manager; **Bob Dickson**, **Kang He** and **Vivian Trueblood** were promoted to senior accountant.

CATALYST LLP

Joining the firm's roster are **Carma Ainsworth**, senior manager; **Dean Litsas** and **Shelley Rines**, staff accountants, and **Margaret Allard**, administrative professional.

THE CONDON GROUP, LTD.

Gina Pasyk became marketing director.

DERMODY, BURKE & BROWN, CPAS, LLC

Recently hired are: **Laura Di Diego**, marketing manager; **Lisa Cornish**, **Lindsay Cronkright**, **Jamie Czaplicki** and **Kimberly Ross**, associates and **Annmarie Peebles**, administrative support.

FRAZIER & DEETER, LLC

Bill Godshall was appointed as head of the firm's audit department.

GORFINE, SCHILLER & GARDYN, P.A.

Julie A. Caniford joins as senior manager and **Gayle Taylor** joins as administrative staff.

HANNIST. BOURGEOIS, LLP

New employees include: **Melissa A. Stubbs**, manager; **Kasey S. Henry**, senior accountant;

Amanda H. Johnston, semi-senior accountant; **Elizabeth Hammett** and **Megan Weaver**, staff accountants I; and **Melissa Richard**, administrative assistant. Promoted were: **Jeff Latino** to partner and **Matthew LaBorde** and **Jennifer Berniard** to staff accountant I.

HERBEIN + COMPANY, INC.

Beth Bershok was hired as regional marketing director; **Thomas N. Graney, Jr.**, was hired as advanced staff accountant. **Bryanna L. Fredericks** and **Robert S. Stoczko** were promoted to senior accountant; **Joshua A. Pollet**, **Roxanne N. Adam** and **Derek M. Rabold** were promoted to supervisor; **Christopher M. Turtell** was promoted to manager; **Jim H. Nehr** and **Carolyn Brynildsen** were promoted to senior manager and **Scott A. Worley** was promoted to investment advisor.

JOHNSON JACOBSON WILCOX

Tanya LaCosehas was named shareholder; **Ryan Enlow** and **Steve Kopjo** joined as staff accountants.

KOURI BEREZAN HEINRICHS

Recent hires include: **Shahzma Shivji**, articling student; **Darren Tso**, co-op student and **Kealy Doyle**, administration.

MCCAULEY, NICOLAS & COMPANY, LLC

Shelby D. Jett joined as an accounting intern; **Neil P. Byrne** joined as staff I. **Tiffany L. Kendall** and **Joseph M. Meier** were promoted to staff I, and **Steven D. Sandman** and **Paul J. Ratterman** were promoted to staff II.

MCGILL, POWER, BELL & ASSOCIATES, LLP

Kevin Oviatt and **Michael Neubauer** were promoted to manager. The firm also has three new partners: **Shawn P. Emerson**, **Robert B. McMunigle**, and **Debbie Parker Pipp**.

MUELLER PROST PC

Fred Lutzeier joined as a principal.

PKF - CALIFORNIA

Jim Stewart was hired as director.

REYNOLDS, BONE & GRIESBECK PLC

Andy Ballard joined as an intern; **Lewis W. Perkins, III** was admitted as a member.

RINEY HANCOCK CPAS PSC

The firm announced a name change to **Riney Hancock CPAs PSC**.

SALTMARSH, CLEVELAND & GUND, P.A.

Having begun his career with Saltmarsh, **H.L. Minnich** has transferred clients of his firm,

Lundy, Minnich & Linnville, to Saltmarsh upon his retirement.

SANSIVERI, KIMBALL & CO, L.L.P.

The firm announces a new name, **Sansiveri, Kimball & Co, L.L.P. (SK&Co.)**, firm logo and the appointment of **Michael A. DeCataldo** as managing partner. **Michelle Hood** was promoted to staff accountant; **John Teixeira** was promoted to manager; **Lynn Mazick** joins the firm as receptionist; **Lynn Boisvert** and **Katelyn Galvin** joined as staff accountants.

SAMPLE & BAILEY, CPAS, P.C.

Ryan S. Wedel, **Courtney K. Kochick** and **Cassandra Lenfert** joined the firm as senior accountants.

SMITH ELLIOTT KEARNS & COMPANY, LLC

Christopher J. Distefano is member-in-charge of the Hanover, PA office. **Brian M. Seiberling** joined as manager and **Amanda D. Ruhlman** joined as supervisor. **Kara Darlington** and **Kristi M. Glass** were elected as associate members and **John Schnitzer** as managing member; **Jason Young** was promoted to manager. New to the firm are: **Shannon Fowkes** and **Shelly Rager**, staff; **Juanita Aubel** and **Amanda Ruhlman**, supervisor; and **Brian Seiberling**, manager.

SOBEL & CO., LLC

The firm merged with M.I. Grossman, Company, L.L.C. New partners as a result are: **Morris Grossman**, **Henry Millin**, and **Jack Bock**. New employees are **Amanda Rocha**, **Amy Jo Morris**, **Arlene Rubenstein**, **Elizabeth Ingelhofer**, **Jon Zollner**, **Jim Zhang**, **Jorge Loureiro Pimenta**, **Gordon Ford**, **Larisa Koval**, **Marsha Levine**, **Mukesh Soman**, and **Norma Ribeiro-Simoes**. Other new hires include: **Joel Berman**, **Moses Adegboyega** and **Michael Fedun**, seniors; **Alex Greco**, semi-senior and **Christina Kedra** and **Rocco Ignozza**, staff. **Barbara Semple** became a member of the firm.

TANNER LC

Personnel who have joined the firm include **Sara Collins**, manager and **Jared Mair**, staff. **Joleen Kremin**, **Jeffrey Hansen**, **David Cook** and **Jacob White** were promoted to senior professionals.

WHITTLESEY & HADLEY, P.C.

Tara Williamson joined the firm as marketing coordinator. **Bob Schreitmueller's** role has expanded to chief operating officer.

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Squar, Milner, Peterson, Miranda & Williamson, LLP (Squar Milner)


Managing Partner: Steve Milner

Web site: <http://squarmilner.com>

Partners: 28

Offices: Headquartered in Newport Beach, CA; other offices in San Diego, Los Angeles & Cayman Islands

Specialty Areas: Public company audits, financial services, bankruptcy, receivership & insolvency services, real estate: tax strategies, audit, due diligence and international tax

Why they joined: To expand their network of firms to refer business to and learn from. 

MEMBER NEWS continued from page 7

WILLIAMS-KEEPERS LLC

John D. Gamble, CPA, joined the ownership group; Emily Bange and Jennifer Stuart were promoted to supervisor; Nathan Alexander, Bridget Geisendorfer, Cliff Lewton, Rhonda Bowne, Jeremy Morris and Laura Hagemier were promoted to senior II; Brandon Hendricker, Brad Langan, Nick Messtres, James Samek, Jessica Lehmen and Megan Toalson were promoted to senior I; Samantha Crane, Amanda Holman, Darrell Wolken, Lori Bestgen, Kelley Frink, Rebecca Knipp, and Angela Strube were promoted to staff II.

WITT MARES, PLC

Promotions: Mary C. Aldrich to partner; Kristen Byrnes to senior and Harvey L. Johnson to manager.

WOLF & COMPANY LLP

Promotions for the firm are: Ryan Doerfler, Rene Finco, Stacy Lindemann and Michal Ploskonka to senior accountant and Nicole Davis to marketing coordinator. New hires include John Cutrera, senior accountant; Jenna Eyberger, Joshua Hahn, Stephen Lacorazza and Brian Schoon, staff accountants; Alia Hannon, retirement plan associate and Kelly Throne, financial advisor.

WOLF & COMPANY, P.C.

Kara A. Stevens promoted to supervisor.

Knowledge Management

Sometimes things just come together. **PKF North America** was looking for a way to connect all the resources at www.pkfna.org so members could easily find them. **CCH** was deploying proven knowledge management software to accounting firms and wanted to offer it to accounting associations as well. Leveraging their respective experience, the two started working together to implement **CCH's** KnowledgeConnect (KC) at www.pkfna.org.

What exactly is knowledge management? An organization's unique skills and experience are what set it apart from competitors. To maximize the value of knowledge within an organization, it must have the ability to identify who has the most useful knowledge, and then record, save and share that knowledge. For knowledge to become a lasting asset, members must be able to find and access it easily. This, essentially, is the goal of knowledge management software.

Most PKF NA members know that www.pkfna.org contains the following knowledge resources:

- Easy ways to contact colleagues with the answers to their questions
- PowerPoints and other documents shared by fellow members
- Recordings and handouts from conferences and webinars
- Best practice tips
- Discussions among members on timely, relevant topics
- Access to members with proficiency in specific niches and practice areas
- And more!

All of the knowledge is there - but is there an easier way to locate and access it?

This is the question that prompted PKF NA to seek out a partner to create an easier way to find this wealth of knowledge. CCH (a Wolters Kluwer business) was a natural fit since they were adapting an already-proven knowledge management product specifically for accounting firms.

Once KnowledgeConnect is implemented, the features of the website that involve knowledge sharing and networking will be accessible from *one central location*. This includes the current e-mail lists, discussion forums, resource directory, and resource library. It will add a wiki-like best practices and FAQ section, the capability for blogs and expanded member profiles.

Members frequently cite networking with other members as one of the most valuable benefits of association membership. **Wendy Grice**, Product Manager for Knowledge Connect, explains that networking is embodied in the new software: "KnowledgeConnect is all about communities, sharing and collaboration."

KnowledgeConnect will not only capture knowledge, but also includes improved search functionality helping members get results relevant to what they are looking for - no matter where it is on the website.

Look for KnowledgeConnect soon at www.pkfna.org. Contact Sherry Bartman, website manager, at sbartman@pkfna.org with questions. 