

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

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## CHAIRMAN'S LETTER



It gives me great pleasure to start off by welcoming our newest member firm, **K. C. Mehta & Co. Chartered Accountants** (Ahmedabad, India). See page 3 for more detailed information.

K. C. Mehta & Co. is our fourth new member firm in India in the past 12 months, and the Worldwide Board will continue to support the country's expansion and branding activities, as well as those in Africa and Asia.

In other action, your Worldwide Board voted to provide each region with block grants, as opposed to pre-determining specific activities, as we've done in the past. Now each region can allocate its funding for those initiatives and activities that are most important to their members.

Please be sure you've completed your firm's online 2016 Member Information Sheet, which has been streamlined to one page and literally takes five minutes to complete. Not only is it a mandatory requirement of membership, but it insures that our total worldwide ranking numbers are current when presented to the international media and business journals.

BKR's committees and practice groups are thriving. The International Tax Committee has revised

their page on the website, which now includes their terms of reference, firm expertise, and additional links to assist members with global tax rates and other financial statistics. They also have a LinkedIn Group, as does the Corporate Finance/M&A Group. Be sure to join the Corporate Finance's next telemeeting on March 9 if your firm has a specialty in this growing practice area.

Also, check out BKR's Meetings Page on the last page of this Bulletin to be sure you have saved the dates for all of our upcoming events. Your Worldwide and Regional Boards and executive office teams have been hard at work finalizing the 2016 round of

regional conferences, and I hope you are planning to attend at least one. There is truly no greater opportunity to share information and ideas, increase your breadth of knowledge, and return home better equipped to assist your clients and manage your firm.

First up is the Asia-Pacific Regional Meeting, which will be held at the Crown Metropol Hotel in Perth, Western Australia, from May 6-9. Next is the Americas Regional Meeting,

to be held at the Four Seasons Hotel in Toronto, Ontario, Canada, May 20-24. Last but certainly not least, The EMEA Region will hold their meeting at the Marriott Hotel in Vienna from June 4-6.

See page 2 for complete information on all of our upcoming regional meetings, and be sure to visit [www.bkr.com](http://www.bkr.com) for meeting registration and hotel reservation forms.

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### BKR'S 2016 REGIONAL MEETINGS

*"There is truly no greater opportunity to share information and ideas, increase your breadth of knowledge, and return home better equipped to assist your clients and manage your firm."*

# 2016 REGIONAL MEETING AGENDAS

## ASIA-PACIFIC REGIONAL MEETING

Crown Metropol Hotel  
Perth, Western Australia  
May 6-9, 2016

### FRIDAY, MAY 6

Asia-Pacific Regional Board Meeting  
Standards Committee Meeting  
Tax Committee Meeting  
Greater China Group Meeting



### SATURDAY, MAY 7

Welcome to Perth  
Asia-Pacific Economic Update  
Introduction of New Member Firms  
BKR Worldwide Chairman Report  
BKR Regional Chairmen Reports  
BKR Scholarship and Presentation  
WWA Practice Group Reports  
BKR Asia-Pacific Tax and Standards Committee Updates  
The Firm of Now

### MONDAY, MAY 9

Annual General Meeting  
Presentation on Singapore Conference  
Presentation on Santiago Conference  
Motivating Your Firm  
FATCA and the U.S. Amnesty Program  
Cloud Accounting and Benchmarking  
Asia Business Presentation  
Closing Remarks

## AMERICAS REGIONAL MEETING

The Four Seasons Hotel  
Toronto, Ontario, Canada  
May 20-24, 2016

### FRIDAY, MAY 20

Governmental/Not-for-Profit Accounting and Auditing Practice Group Meeting

### SATURDAY, MAY 21

Accounting and Auditing Update  
Federal Tax Update  
Americas Regional Board Meeting  
Latin American Firms' Meeting

### SUNDAY, MAY 22

Canadian Tax Practice Group Meeting

### MONDAY, MAY 23

Welcome to Toronto  
Report of the Chairman
 

- Vote on nominations to the Americas Board
- Vote on BKR financial statements/budget

 Strategies to Truly Engage and Retain Your People  
Highlights of BKR's 2016 Member Firm Analysis  
Breakout Sessions (Each Presented Twice)
 

- Moving Away from the Time and Place Paradigm
- Drilling Down Into the 2016 Statistics
- Corporate Finance/M&A
- Assessing the Client Experience for Challenges and Opportunities

 Orientation for New and Guest Firms

### TUESDAY, MAY 24

Professional Update  
Around the World in 30 Minutes:  
Regional Panel Discussion  
BKR's Practice Group Updates:
 

- High Net Worth Families/Estate Planning
- Corporate Finance/M&A

 Network Like a Millionaire and Never Forget a Name  
Panel: Successful Succession: The Do's and Don'ts of Partner Retirement  
Do They Deserve to Work with You? Getting and Keeping the Best Clients  
Professional Liability Claims Statistics and Key Loss Drivers  
Technology Update and Predictions for 2016  
Closing Remarks and iPad Raffle

## EMEA REGIONAL MEETING

Marriott Hotel  
Vienna, Austria  
June 4-6, 2016

### FRIDAY, JUNE 3

EMEA Regional Board Meeting

### SATURDAY, JUNE 4

Introduction  
Welcome  
Worldwide and Regional Round Table  
Annual General Meeting  
Social Media and Marketing  
Leadership Orchestra  
Breakout Sessions  
EMEA Tax Committee Meeting



### MONDAY, JUNE 6

Preview of Future Meetings  
Austrian Economic Subject  
Statistical Analysis  
Closing Remarks



# MEMBER PROFILE: WALKER WAYLAND, CHARTERED ACCOUNTANTS (PERTH)

**Walker Wayland, Chartered Accountants** was established in 1985 by **Joe Lamhut**, who is at present the managing director. His co-directors and shareholders are **John Dorazio** and **Iggy Moro**. Joe always wanted to create a practice that excelled in personal, friendly service, along with a work environment where having the right amount of fun whilst working was of paramount importance.

Throughout the firm's 31 years of existence, there have been a number of mergers and de-mergers, but growth, mainly, has come organically.

In the early years, the West Australian office of Walker Wayland was instrumental, along with **Stephen Roger** from **Walker Wayland - Sydney**, for the establishment of the Walker Wayland Association in the capital cities of Australia.

Today, Walker Wayland Australasia is represented in 10 offices in Australia and four offices in New Zealand.

Walker Wayland, for many years, has punched above its weight. Whilst the total number in the team is currently only 19, the firm is well known and respected in a number

of specialised areas, including health and franchising. For example, the firm is accredited by all the major banks in Australia to carry out valuations of businesses in the health sector. This accreditation is only awarded to approximately six firms across Australia.

In addition to these specialties, the firm provides the usual range of professional services, including:

- Taxation Compliance
- Audit and Assurance
- Due Diligence
- Expert Witness Services for Court Disputes
- Superannuation
- Financial Planning
- Business Advisory
- Estate Planning
- Migration Services

Like many other firms around the world, Walker Wayland WA is moving away from relying/focussing on compliance work, and vigorously expanding its range of business advisory services. This has entailed investment in the right people, new marketing initiatives, new analytical software, and standardisation of processes to make it all work. Moving direc-

tors and accountants from their comfort zone (compliance) was a challenge.

Another exciting change in our range of services is the recent employment of a licenced Migration Agent, specialising in business migration. Her name is **Chermain Cheong**. Fellow BKR members can now avail themselves of this service for their clients interested in migrating to Australia.

Through the wide range of skills existing in the Australia and New Zealand Walker Wayland member offices, the provision of a diversity of services to our clients is made easier and more possible. This enables Walker Wayland WA to focus on the cradle to the grave approach to our clients, culminating in our mantra: Total solutions, Peace of mind.

With the assistance of Stephen Roger, Walker Wayland WA is now finalising arrangements for the BKR Asia-Pacific Regional Meeting that will be held in Perth from the 6th to the 9th May 2016. We are looking forward to meeting as many members as possible to (hopefully) sunny and beautiful Perth. It is a privilege to host such an important event on the BKR calendar. Travel safely, and come and enjoy our friendly hospitality.

## BKR WELCOMES NEW MEMBER FIRM IN INDIA

BKR International is pleased to announce the acceptance of **K. C. Mehta & Co. Chartered Accountants** (Ahmedabad, India) into membership.

Established in 1958, K. C. Mehta & Co. Chartered Accountants offers an extensive array of services in accounting, assurance, risk, tax, financial and capital management, business consultation, and other advisory services. They firms has 11 partners and a staff of 370.

The firm's specialties include power;

engineering; oil and gas; chemicals, pharmaceuticals, and research; plastics; and banks.

They have also developed a number of primary service verticals that are integrated, yet function independently, including statutory audit and assurance, management audit, direct and indirect tax, international tax and transfer pricing, and corporate advisory services.

K. C. Mehta & Co. Chartered Accountants has branch offices in Bangaluru, Mumbai, and Vadodara, India.

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# SMALL STEPS TO MAKE A BIG DIFFERENCE

By: Calvin Upton, Audit Manager (Houston)

To kick off the 2016 New Year and busy season for many CPAs, **Briggs & Veselka Co.** (B&V Runners) in Houston, Texas, joined 27,000 other runners from around the nation and the world on Sunday, January 17, 2016, to run the streets of Houston in the 2016 Chevron Houston Marathon and Aramco Houston Half Marathon. Since the inception of the race in 1972, the Chevron Houston Marathon and Aramco Houston Half Marathon

have raised over \$20 million for charities.

This was the sixth consecutive year in which the firm has been represented by B&V Runners participating in the race (**Melanie Alpers, Meryl Bender, Courtney Hinojosa, Danielle Holmes, Erik Konicki, Lien Le, Calvin Upton, and Jammie Weidert**). While each participant may have a different individual goal, this year the firm participants decided to make a small

impact in the lives of those who may not have the opportunity to participate.

After the race, participants decided to donate finisher medals from this event or past completed events to the **Snowdrop Foundation**. Snowdrop is a foundation located in Houston, Texas, that provides funding for continued

pediatric cancer research at Texas Children's Cancer Center, along with providing scholarships for pediatric cancer patients and survivors that are college-bound.

Snowdrop caught the attention of B&V Runners with their unique program, entitled **Bling for Bravery**. This a program that was developed through the foundation to celebrate and reward the bravery of pediatric cancer patients as they progress through various treatment programs at the Texas Children's Cancer Hospital.

To a runner, a distance event is a test of endurance and dedication throughout each mile of the event. In the case of a pediatric cancer patient, THEIR treatment program is THEIR marathon – enduring every ounce of dedication, bravery, and endurance to get through the next “mile.”

To a runner, the finisher medal is a symbol of accomplishment and a memento to hang on the shelf. However, for these young pediatric patients, these medals are a symbol of “success” and may be all the perseverance they need to get to the next mile. While it is a small token in the grand scheme of things, Briggs and Veselka is proud to be part of their journey!



**The B&V Runners, from left to right: Lien Le, Danielle Holmes, Jammie Weidert, Meryl Bender, Calvin Upton, and Erik Konicki. Not pictured: Melanie Alpers and Courtney Hinojosa**

## CHAIRMAN'S LETTER

(Continued)

*Continued from page 1*

Wrapping up our year is the grand finale of conferences – BKR's Annual Worldwide Meeting – November 12-15 – in Santiago, Chile! The five-star Ritz Carlton Hotel will serve as our base of operations, and our host firm partners are looking forward to introducing you to their sophisticated city. From museums and merlot to sea bass and salsa, Santiago is sure to have something for everyone. Visit <http://bkr.com/bkr-event.php?ANNUAL->

[WORLDWIDE-MEETING-418](#) to plan an exciting pre or post tour as well.

I wish all to whom it applies a successful busy season, and I look forward to seeing you in Perth, Toronto, Vienna, and Santiago.

Regards,

**Howard Rosen**

## LATEST BKR STATISTICS:

162 Firms  
530 Offices  
79 Countries  
981 Partners  
9,328 Professional Staff  
1,199 Administrative Staff

# WORLDWIDE BULLETIN

is a publication of

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### SUBMISSIONS

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

# BKR MEMORIAL

It is with broken hearts that **Albrecht, Viggiano, Zureck & Co., P.C.** (AVZ) (Long Island) announces the untimely death of Partner **Steve Antaki**. Steve joined AVZ in 1982 and has been a partner since 1999. His countless contributions to AVZ are all around. He was a pivotal part of growing and nurturing the firm's government business. He formed deep and lasting relationships with all of his clients, many of whom counted him among their closest friends. Countless hours could be spent talking about Steve the partner, but instead the firm would like to share its thoughts about Steve, the husband, father, and friend.

Steve had a "big" personality; he was funny, generous, smart, mischievous, honest, trustworthy, dependable, kind, and always willing to lend a helping hand. As big as Steve's personality was, it only paled in comparison to his heart. He lived life to the fullest and touched so many people along the way.

It's impossible to pay tribute to Steve without recognizing the role his faith played in his life. Steve's spirituality was the guiding force behind everything he did. He always tried

to be the best he could be - family man, friend, partner, colleague, or champion to others.

Saying goodbye to Steve seems surreal. We haven't fully digested all that's happened this past week. Not only is it hard, but it's not what we want to do. We know Steve's presence will always be felt within the walls of AVZ. He touched so many people's lives in such a positive way. He leaves an amazing legacy behind and left this world a much better place than how he found it. We are luckier for having known him and feel privileged to have had the chance to spend time together, however short it seems today. We will miss him terribly and remember him lovingly. Please keep his family in your thoughts and prayers.



# NICHE NEWS

## Business Development

### Chair – Jeremy Vokt (Omaha)

On January 7, Guest Speaker Lee Frederiksen, managing partner at Hinge, gave members of BKR's Business Development Group a presentation on "Accelerating Firm Growth Through Integrated Sales and Marketing." Participants earned one hour of CPE credit. The next telemeeting will be held on April 21, at 2:00 p.m. Eastern Time.

## Firm Administrators

### Chair – Colin Jackson (Boston)

BKR's Firm Administrators Practice Group Telemeeting was held on January 5. Topics

included engagement letters, credit card solutions, collection calls, and challenges for 2016. The next telemeeting will be held on April 5 at 2:00 p.m. Eastern Time.

## Forensic Accounting/Litigation Support

### Chair – Marnie Silver (Toronto)

BKR's Forensic Accounting/Litigation Support Practice Group Teleseminar was held on January 27. New Chair Marnie Silver was introduced, and Josh Epstein (Toronto) reviewed a presentation entitled, "Lost Profits: A Case Study of Reasonable Certainty and

*Continued on page 7*

# RAVE REVIEW FOR BKR'S MEDICAL PRACTICES AND HEALTH CARE PRACTICE GROUP MEETING IN ORLANDO

**Amanda Angle**, tax principal at **Watkins Uiberall's** Tupelo, Mississippi, office, attended BKR's Medical Practices and Health Care Practice Group Meeting in Orlando, Florida, on January 21 & 22. She was so impressed with the meeting that she submitted the following:

I am so glad that **Lane Poland** and I attended the BKR Medical Practices & Health Care Practice Group Meeting in Orlando this year! I merged with Watkins Uiberall, PLLC in October of 2014 and work in the Tupelo office as a tax principal.

We view the health care industry as a growth

opportunity for our Tupelo office. Meeting with other BKR members with expertise in this area was very helpful. While in attendance, we determined specific areas where we could add value to our current clients, as well as refer services we do not provide to the other atten-

dees.

The group discussion related to best practices allowed each of us to share what is working currently, as well as brainstorm what might work with the industry changes in the year to come.

The best takeaway was the development of new relationships with people that will be valuable for us in the future.

I highly encourage any members that are "generalists" like myself that plan to grow their practices with physicians, clinics, or hospital systems, as well as specialized health care consultants, to prioritize these meetings in the future!



**BKR's Medical Practices and Health Care Practice Group Meeting in Orlando, Florida, on January 21 & 22**

## AJAY DOSHI (KOLKATA) PUBLISHED IN ECONOMIC TIMES

**Ajay Doshi** was published in the *Economic Times*, Kolkata edition, on February 11, 2016. The article, entitled "Need to Induct MBAs into Accountancy Firms Stressed," addresses the need to broaden the gamut of accountancy firms by inducting professionals from other related areas, such as graduates from business schools (MBAs). The article appeared as follows:

"Graduates of business schools (MBAs) should get inducted as partners in the accountancy and legal firms to bring new insight into the profession," said chartered accountant **Ajay Doshi**, managing partner, **Doshi, Chatterjee, Bagri & Co.**

"Induction of MBAs into accountancy firms will add value and improve the quality of the assignment, which is carried out by an

accountancy firm. Not only that, MBAs can also help in the growth of the firm, as well as accountancy and legal profession by providing new insight into both professions," Doshi added.

Presently, professional practices in India are open to those persons who are qualified in their respective fields. For example, only chartered accountants can carry out the accountancy profession in India, either individually or jointly with another similarly qualified person in a partnership firm or LLP. Doshi is of the view that these restrictions, in several cases, have resulted in stagnation of the growth of the practice or stunting a multi-dimensional or a 360 degree growth of the person who is carrying on such practice.

### ARE YOU ON BKR'S E-UPDATE LISTS?

The Executive Office sends out a short update to all firms in the U.S. and Canada each week, and to the rest of the world each month, outlining current services, benefits, meetings, and telemeetings, all of which are important aspects of your membership.

To receive either of these updates, log in to Member Services, click on Edit User Profile in the left menu, and select either "E-update" or "Worldwide E-update."

# NICHE NEWS

(Continued)

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Discounting.” Participants earned one hour of CPE. The group’s next teleseminar will be held on May 9 at 2:00 p.m. Eastern Time.

## **NEW! International Corporate Finance/Mergers and Acquisitions**

### **Chair – Stephan May (Ottawa)**

On what day this group met depends on what country you reside in – members in the Western Hemisphere dialed in on February 10, while those in Asia-Pacific got up very early on the morning of the 11th.

Members discussed their new LinkedIn Group, uses for their budget (which will fund their international calls and annual meeting), as well as secure resources for sharing files, internal software, and market opportunities for clients around the world. Their next telemeeting will be held on March 9 at 4:00 p.m. Eastern Time.

## **International Tax (Americas Region)**

### **Chair – Ken Laks (Long Island)**

A dozen members from the U.S., Canada, and Mexico held their telemeeting on February 1. Discussions included issues and client case studies concerning IC-DISC, FBAR Disclosures, and Foreign Disregarded Entities. Their next

telemeeting will be held on May 5 at 2:00 p.m. Eastern Time with an outside speaker on IC-DISC.

## **Medical Practices and Health Care**

### **Chair – Libby Hornibrook (Minneapolis)**

The group met in Orlando, Florida, on January 21 & 22. Topics included integrated delivery systems, ways to help doctors stay independent, key performance indicators, hot topics in health care law, revenue cycle reviews, physician compensation plans, and best practices roundtables. Attendees earned 13½ hours of CPE credit. Be sure to read the rave review from new practice group member **Amanda Angle** (Tupelo) on page 6.

## **Retirement Plan Auditors**

### **Chair – Deborah de Vries (New York)**

The Retirement Plan Auditors Practice Group Telemeeting was held on February 3. Topics included ASU 2015-12 implementation consideration and material for clients, streamlining PPC audit programs, best practices in documenting independence and other non-attest services, and DOL quality reviews and investigation activity. The group has scheduled a dinner meeting on May 10 in conjunction with the AICPA’s Employee Benefits Conference in Las Vegas. Members are encouraged to use the code, BKR16, to receive a 17% discount on all

AICPA conference registrations.

## **Tax (Canadian)**

### **Chair – Don Scott (Ottawa)**

The Canadian Tax Practice Group held a telemeeting on January 26. Topics included the next Canadian Budget, U.S./Canadian cross-border reporting requirements, S.55(2) and paying dividends, life insurance calculation changes, tax rate increases, changes to new trust rules, amendments to S.55 RDTOH planning versus an increase in tax rates, and the late filing of R&D claims.

The group will meet in conjunction with the 2016 Americas Regional Meeting on Sunday, May 22, at the Four Seasons Hotel from 3:00 p.m. - 5:00 p.m. All regional and international tax personnel are welcome to attend. Contact the Executive Office for more information.

## **Tax (U.S.)**

### **Chair – Jeff Calderon (Louisville)**

More than 25 tax pros took time away from their super busy schedules on February 9 to discuss some of the challenges of the season and how others are dealing with them. Topics included software problems with generating tax organizers and engagement letters, efficient ways of training temporary staff, third party disclosures, and the annual in-person tax update in Toronto on May 21. The group will hold their next telemeeting on April 25.

**When referring work to other BKR members, avoid miscommunication!**

**Be sure to put (and get) the engagement requirements in writing.**

**Use BKR’s convenient referral form! Download it at [www.BKR.com](http://www.BKR.com) > Member Services > BKR Resources > BKR Tools.**

## **About BKR's Specialized Services Practice Groups/Committees:**

**Firms that offer (or are developing) specialty services have formed groups to share resources and expertise. Groups hold quarterly telemeetings and/or annual meetings, and develop seminars, brochures, and more. For more information, including meeting summaries, supporting documents, and contact information, visit [www.BKR.com](http://www.BKR.com) > Member Services > Practice Groups/Committees.**

# MEMBER NEWS AND NOTES

## Bogotá, Colombia

In November, **BKF International** participated as a sponsor of the IFRS Conference of the Americas in the city of Cartagena, which was attended by experts from the Americas who discussed international financial reporting standards. The presence of Hans Hoogervorst, IASB chairman, who was interviewed for BKF's magazine, *El Indicador*, was very important.



**IASB Chairman Hans Hoogervorst and Humberto Fernandez (Bogota)**



**BKF International helped sponsor the recent IFRS Conference of the Americas in the city of Cartagena.**

## Canton, Ohio

Supervisor **Seth Turner**, CVA, of **Hall, Kistler & Company LLP** will serve as the 2016 chairman of ystark!'s executive committee. Seth joined ystark! three years ago and immediately became engaged in a full range of activities and quickly became the membership chair before moving to vice chairman in 2015, and chairman in 2016. Seth, a supervisor at Hall,



**Seth Turner**

Kistler, has been with the firm for 12 years and practices in all areas of tax and accounting with a specialty in the area of business valuations. He graduated from Stark State College of Technology in 2004 with an associate of applied business degree in accounting (with distinction).

**Mary Jo Gowins-Scott** has earned her bookkeeping certificate from Stark State College of Technology. Mary Jo has served as an administrative professional for the firm since 1982 and now will have additional responsibilities as she joins our bookkeeping staff helping clients with payroll and bank reconciliations. Mary Jo is a member of Our Lady Lourdes Grotto Committee at Central Catholic High School, a Hall of Fame Parade Committee volunteer and a member of the Canton Regional Chamber of Commerce.



**Mary Jo Gowins-Scott**

**Jolene Colant**, director of marketing received the Akron-Canton Affiliate National Sales and Marketing Executives Achievements in Excellence™ Award. Chosen from over 140 applicants, she joins the Class of 2016 and will receive her award on February 23rd at a reception at Tangiers in Akron.



**Jolene Colant**

The NSME Achievements in Excellence™ awards were established to recognize the best in the sales and marketing profession. The honorees have demonstrated the highest levels of professionalism during their careers in diverse sales and marketing roles. Winners are selected by NSME leaders, based on nominations from local professionals, questionnaire responses provided by the nominees, and publicly available information. Criteria include community and civic involvement, professional experience, and demonstrated performance.

With more than 20 years of marketing and communication experience, Jolene leads

Hall, Kistler & Company in all marketing, social media, coaching, and business development initiatives. Her prior experience includes marketing and communications for the legal and retail communities. She holds a bachelor's degree in mass media communications from the University of Akron. In addition to her membership in NSME, Jolene is a founding member of Women's Impact, Inc. and serves on the executive board. She is also a member of the Association for Accounting Marketing, and is a past chair of BKR International's Marketing Committee and a past president of the Canton Advertising Federation.

## Cincinnati, Ohio, USA

The shareholders of **Rudler PSC** are pleased to welcome **Lori Warden**, CPA, CGMA, as shareholder effective January 1. Lori is especially skilled in the public accounting areas of captive insurance and peer reviews. Dedicated to consistent professionalism and standards in the industry, she serves as treasurer of the Kentucky State Board of Accountancy and is a National Association of State Boards of Accountancy Compliance Assurance Committee member. In addition to Certified Public Accountant, Lori also holds a Chartered Global Management Accountant certification. A graduate of Marshall University with a Bachelor of Business Administration and Accounting Degree, Lori currently resides with her family in Northern Kentucky.



**Lori Warden**

## Houston, Texas, USA

**Briggs & Veselka Co.** announced the acquisition of the CPA firm Vacek, Lange & Westerfield, P.C. (VLW) effective January 1.

Founded in 1986, VLW provides tax, accounting, and management advisory services to a client base of approximately 1,500 individuals and enterprises located principally in the state of Texas. The firm also provides

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# MEMBER NEWS AND NOTES

(Continued)

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professional associations (primarily the legal, medical, brokerage, and insurance professions) a variety of services to suit their business needs.

## Kolkata, India

**Doshi, Chatterjee, Bagri & Co.** welcomed New Partner **Chandi Bagchi** on December 1, 2015. Chandi is a national and internationally accredited professional with more than three decades of post qualification experience and exposure in inland and cross



**Chandi Bagchi** border assignments. He started his career with Price Waterhouse in the year 1985 and thereafter spent more than 15 years in Indian Oil Corporation Limited, having a turnover of US\$30 billion at that time, at various positions, and was actively engaged in finalization of financials at unit level, as well as divisional level. He has also spent more than seven years in Canada as a practicing professional, as well as in doing corporate audit and risk management services in Avenue Road Roofing, the largest commercial roof-construction company in Canada.

His post qualification experience encompasses statutory audits of corporations, risk based internal audits of multinational companies, due diligence exercises, transfer pricing assignments in cross border entities, statutory and internal audits for banks, and internal and statutory audits of non-banking financial companies. Aside from being a Chartered Accountant and a Master in Commerce from the University of Calcutta, he is also an associate member of the Institute of Company Secretaries of India. He is a chartered professional accountant from the Canadian Institute of Chartered Accountants and a CMA from the Chartered Institute of Management Accountants, London, UK. He is also a diploma holder in system audit from the Institute of Chartered Accountants of India. Chandi is a member of the Institute of Internal Auditors.

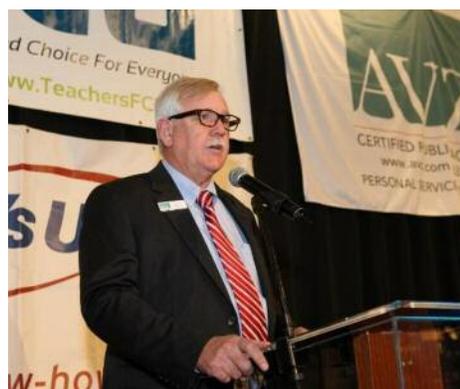
He was the president for the institute's Calcutta Chapter for 2014-2015, and has been one of the members of its Governing Board.

## Lefkosa (Nicosia), Cyprus

**Dimitra Frixou** of **Euroglobal SEE Audit Limited** has been featured on Gold News for her global achievement in the P1 Performance Management paper. Read the article in its entirety at <http://www.goldnews.com.cy/en/financial-services/euroglobal-trainee-secured-worldwide-achievement>.

## Long Island, New York, USA

**AVZ's** 22nd Annual Long Island Economic Survey & Opinion Poll, the results of which were presented on January 7 at the Crest Hollow Country Club in Woodbury, New York, proved to be a huge success. This year, more than 375 guests and 16 sponsors attended the event. The moderators were **Tom Murray** and **John Kominicki**, and the panelists were Rick Lazio, former U.S. congressman and director of alliantgroup, Dr. Kimberly R. Cline, president of Long Island University, and Jamie Moore, chairman and president of ADDAPT. Download the Long Island Economic Survey & Opinion Poll at <http://files.ctctcdn.com/2ed26de0101/b0cc297b-ef5b-4c93-add5-321882129fd3.pdf>. *Long Island Business News* was also there to cover the event. Read all about it at <http://files.ctctcdn.com/2ed26de0101/90a0ad>



**Tom Murray speaks at AVZ's 22nd Annual Long Island Economic Survey & Opinion Poll.**

[cc-2e2a-4bdc-a6d5-9464f6188953.pdf](http://www.blickrothenberg.com/cc-2e2a-4bdc-a6d5-9464f6188953.pdf).

## London, United Kingdom

**Blick Rothenberg LLP** has released a summary of the latest developments in relation to transfer pricing regulations and documentation, "New Year - New Transfer Pricing Disclosure," located at <http://www.blickrothenberg.com/getmedia/58f050d7-01cf-456c-a76c-10305bcbcd919/BEPS-Transfer-Pricing.pdf.aspx>.

Blick Rothenberg has recently been celebrating great exam results across their teams, with special mentions for the following outstanding individuals. **James Bailey**, expatriate tax senior, was awarded a Distinction for the Advisory: Inheritance Tax, Trusts & Estates Paper in the November 2015 CTA examinations. **Raj Nandha**, expatriate tax assistant, was awarded the Jennings Medal for the candidate with the highest mark in the U.K. in Paper 2 – Business Taxation & Accounting Principles in the ATT exams.

The firm has undertaken to become a signatory for Access Accountancy, a charity that has been set up to improve access to the accountancy profession. Uniquely, Access Accountancy is a cross-firm collaboration of employers and professional bodies, with trustees from Blick Rothenberg (partner **Andrew Sanford**), EY, PWC, KPMG, BDO, Grant Thornton, NAO, Deloitte, and Mazars. By becoming a signatory, they have agreed to providing 3 x 30 hour work placements for students from a disadvantaged background. As a firm, they are also proud to push the apprentice route. In the U.K., apprentices comprise approximately 1% of the overall workforce, whereas, at Blick Rothenberg, they average around 3%.

Over the past few months, Blick Rothenberg has released various topical briefings and publications. In the [Tax Planning Guide 2016](#), they set out tax planning tips, which all taxpayers should consider as the tax year end approaches, as well as providing commentary on the more significant changes

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# MEMBER NEWS AND NOTES

(Continued)

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this year. Transfer pricing policy has taken on added significance due to considerable media attention on whether international tax rules can keep pace with modern business practices, the globalisation of corporations, and the digital economy. Click [here](#) to view a summary of the latest developments in relation to transfer pricing regulations and documentation.

The firm has also refreshed its [Expatriate Tax Services brochure](#) to show their considerable experience in helping organisations and individuals who work across international borders with tax, social security, payroll compliance, tax planning, and related policy issues. And finally, Blick Rothenberg is preparing for the upcoming Budget on 16 March, which sets out the government's plans for the economy, as well as any proposals for changes to taxation.

## Los Angeles, California, USA

**Michael Savoy**, CPA, CGMA, and senior shareholder at **Gumbiner Savett Inc.**, has been elected secretary/treasurer of the California Board of Accountancy (CBA) for 2015/2016.

Michael assumes his new position with more than 40 years of experience in the accounting field and with more than five years of experience serving on the CBA Board. He was appointed to the CBA in 2010 by Governor Arnold Schwarzenegger and was elected secretary/treasurer in 2011/2012, vice president in 2012/2013, and president in 2013/2014.



**Michael Savoy** elected secretary/treasurer in 2011/2012, vice president in 2012/2013, and president in 2013/2014.

Michael was re-appointed to the CBA Board in 2015 by Governor Jerry Brown. Created by statute in 1901, the California Board of Accountancy's legal mandate is to regulate the accounting profession for the public interest by establishing and maintaining entry standards of qualification and conduct within the accounting profession, primarily through its authority to license.

## Louisville, Kentucky, USA

**DMLO CPAs** is pleased to announce that, effective October 1, 2015, **Nancy Vuckson** was promoted to senior manager and **Belinda Wigington** to manager.

## Luanda, Angola

**ACE – Auditangol Consulting Enterprise, Lda.** is proud to be celebrating its 14th anniversary. The firm has also launched a brand new website at <http://www.aceangola.com>.

## Manchester, New Hampshire, USA

**Howe, Riley & Howe, PLLC** is excited to introduce its new managing partner team. **Lance Turgeon** and **Alison Perrella** took over as managing partners effective January 1, 2016, replacing **Peter Kiriakoutsos**, who has managed the firm since 2006. Peter will continue as a principal in the firm working with clients providing tax, accounting, and business consulting services.

Alison, who lives in Bedford, joined the firm as a principal in 2012 after working as a sole practitioner for more than 20 years. She became a partner in 2015 and focuses her tax practice on providing planning, transactional, and compliance services to businesses, individuals, and trusts. As a managing partner, she will focus on Howe, Riley & Howe's marketing and community engagement efforts.

Lance, who lives in Northfield with his wife and three children, has been a practicing CPA since 1996 and became a partner at Howe, Riley & Howe in 2008. His areas of expertise include working with nonprofit organizations, long-term care facilities, private clubs, health and welfare benefit plans, insurance trusts, and manufacturing and publishing companies. As a managing partner, he will focus on administration of the firm.

## Mumbai, India

*The Economic Times* has ranked **T.R. Chadha & Co.** among the top 10 largest firms in India. Read the full report at

<http://economictimes.indiatimes.com/industry/services/consultancy/-/audit/deloitte-biggest-audit-firm-in-2015-charged-rs-225-crore-in-fees-prime-database/articleshow/50670250.cms>.

## Mt. Arlington, New Jersey, USA

**Nisivoccia LLP** is pleased to announce the following professional promotions:

- **Nancy Kazaba** to principal
- **Ray Sarinelli** to manager
- **Glenn Schwier** to manager

**Man Lee**, CPA, RMA, PSA, principal at Nisivoccia LLP and board member of the American Red Cross Northern New Jersey, led a firm donation initiative to the American Red Cross Adopt a Unit program. Nisivoccia LLP employees donated select items that contributed to "Comfort of Home" packages to those serving our country overseas.

Partner **Bud Jones** held a Certified Municipal Finance Officer Roundtable on Wednesday, December 16, 2015, at the firm's office in Mount Arlington. More than 25 people participated in the topic, "Preparing for the Audit & More." Partners **Valerie Dolan** and Bud Jones led the discussion.

In the spirit of the holiday season, Nisivoccia LLP sponsored its annual holiday drive to help others in need. This year the charity of choice was Roxbury Social Services. Employees helped by purchasing gifts and making monetary donations for three families in the community.

**Harlene Stevens**, CPA and manager at Nisivoccia LLP, had the opportunity to share her input about how medical practices can reduce the amount of copays that go unpaid. She was quoted in The Coding Institute's January 2016 Practice Management Alert.

Bud Jones, CPA, RMA, PSA, and partner, presented "Understanding the Audit" on behalf of the Somerset County School Board Association on January 12, 2016, at Somerville High School, Somerville, New Jersey.

More than 250 clients and employees attended the firm's client appreciation event

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# MEMBER NEWS AND NOTES

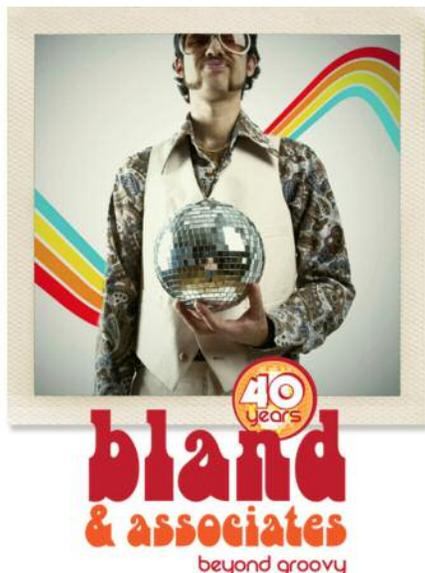
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on January 14, 2016, at the office in Mt. Arlington, New Jersey. Clients from all business segments attended and enjoyed the opportunity to visit with the firm's partners and employees, as well as network with the other clients.

## Omaha, Nebraska, USA

**Bland & Associates, P.C.** is proud to announce that it is celebrating its 40th anniversary as a firm. Find out more details at <http://www.blandcpa.com>.



forty? far out.

We've come a long way, baby...

and we couldn't be more proud to be serving Omaha, Lincoln and the surrounding communities for 40 years...go beyond groovy with Bland. check us out at [www.blandcpa.com](http://www.blandcpa.com). ain't no stopping' us now!

**Bland & Associates, P.C. celebrates 40 years.**

## Ottawa, Ontario, Canada

**Welch LLP** is proud to announce that its Ottawa office and staff members are up for five awards given by *Faces Magazine* for 2016. As a company, the firm is up for Best Place to Work and Business Social Media Account. The

Welch LLP staff award nominees are as follows:

- **Mike Moher** – Best Accountant
- **Mylaine Gauvreau** – Best Executive Assistant
- **Kyle Turk** – Best Social Media Personality

For more details, visit <http://facesmag.ca/awards>.

## Pittsburgh, Pennsylvania, USA

**Louis Plung & Company** is proud to announce that **Lora Bahrey-Ament** has been

promoted to tax manager. Lora joined Louis Plung & Company in 2011 as a senior II. Her expertise is in construction, wholesale, real estate development, and manufacturing. In her new role, Lora will be responsible for scheduling and monitoring tax engagements, reviewing workpapers and returns, and supervising staff. She earned a bachelor's degree in accounting from Robert Morris University and her MBA from Duquesne University. She currently resides in Peters Township with her husband and three children. Lora looks forward to assisting in the growth of the company and providing excellent service to her clients.

## Philadelphia Region, Pennsylvania, USA

**St. Clair CPA Solutions** is proud to congratulate **Frances Sperling Feldbaum**, CPA, MBA, and principal of the firm, on winning the 2016 award for The Arts + Business Council of Greater Philadelphia Volunteer Leader of the Year. Fran joined St. Clair CPA Solutions in 2000. She advanced in her career, seeking a way to develop her leadership skills and expand her professional contacts and community service. In 2013, Fran participated in the Arts + Business Council's Business on Board program, a five-month leadership development and board placement program. Upon graduating from the program, Fran was placed on the Board of Directors of



**Walker Wayland - Sydney held an event to commemorate its 30th anniversary on November 28 at the Sydney Opera House.**

BalletX, and was voted treasurer of the board in 2014.

## Sydney, Australia

**Walker Wayland - Sydney** has launched a photo gallery of its 30th Anniversary Event on Saturday, November 28, 2015. The firm would like to thank everyone who supported the event. Below is a link to the photo gallery from the evening: <https://spaces.hightail.com/space/zki6> (password: 000). Feel free to download any photos from the event.

BKR Asia-Pacific Regional Executive Director **Stephen Roger** was interviewed in the February 11 *Manilla Times* article, "PH Should Consider Tax Billing System." Read the piece in full at <http://www.manilatimes.net/philippines-should-consider-tax-billing-system/244436>.

## REMINDER!

Submissions for the May/June 2016 issue of the BKR International Worldwide Bulletin are due by Monday, April 11, 2016. Electronic formats are preferred for both text (e-mail, Word, or PDF documents) and photographs (TIF or high resolution JPG attachments).

# 2016 MEETING/TELEMEETING SCHEDULE

March 1	Human Resources Practice Group Telemeeting*
March 2	Future Leaders Practice Group Teleseminar*
March 9	Marketing Practice Group Telemeeting [1:00 p.m. Eastern Time]
March 9	Corporate Finance/M&A Services Practice Group Telemeeting [4:00 p.m. Eastern Time]
March 12	South Africa Subregional Meeting Johannesburg, South Africa
March 21	BIG Subregional Meeting Offices of Blick Rothenberg LLP London, United Kingdom
March 21	Business Valuation Practice Group Teleseminar*
March 21	International Tax (Worldwide) Committee Telemeeting [8:00 a.m. Eastern Time]
March 22	Assurance Services Practice Group Telemeeting*
April 5	Firm Administrators Practice Group Telemeeting*
April 19	Affordable Housing and Real Estate/Construction Joint Practice Group Teleseminar*
April 21	Business Development Practice Group Telemeeting*
April 25	U.S. Tax Practice Group Telemeeting*
April 26	SALT Practice Group Telemeeting*
April 27	High Net Worth Families/Estate Planning Practice Group Telemeeting*
May 3	Marketing Practice Group Meeting The Roosevelt Hotel New Orleans, Louisiana, USA
May 4	Technology (Internal) Practice Group Telemeeting*
May 5	International Tax (Americas) Committee Telemeeting*
May 6-9	<b>ASIA/PACIFIC REGIONAL MEETING</b> Crown Hotel Perth, Australia
May 9	Forensic Accounting/Litigation Support Practice Group Teleseminar*
May 10	Canadian Tax Practice Group Telemeeting*
May 11-13	BKR Leadership Institute Graduation Program Doubletree Metropolitan Hotel New York, New York, USA
May 20	Governmental/Not-for-Profit Accounting and Auditing Practice Group Meeting
May 20-24	<b>AMERICAS REGIONAL MEETING</b> Four Seasons Hotel Toronto, Ontario, Canada
June 4-6	<b>EMEA REGIONAL MEETING</b> Marriott Hotel Vienna, Austria
August 3-5	Leadership Institute - Session 1 St. Louis, Missouri, USA
November 12-15	<b>ANNUAL WORLDWIDE MEETING</b> The Ritz-Carlton Santiago, Chile
November 28	EMEA Region Tax Meeting Amsterdam, The Netherlands
November 29	EMEA Region Future Leaders Meeting Amsterdam, The Netherlands
December 5	Managing Partner Roundtable Meetings Hyatt Regency Orlando Airport Orlando, Florida, USA

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