

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

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CHAIRMAN'S LETTER

I am so pleased to announce the approval of FOUR new member firms in the past two months, all in the Asia/Pacific Region! As previously reported, your Worldwide Board made a concerted effort and earmarked funding to expand membership in Asia/Pacific, first in China and, more recently, in India, and it is extremely gratifying to see all of our efforts come to fruition.

Please help me extend a warm BKR welcome to **RAO & EMMAR, CHARTERED ACCOUNTANTS** (Bangalore, India), **PRATAP-KARAN PAUL & CO.** (Chennai, India), **Fuyun (Fuzhou) Certified Public Accountants** (Fuzhou City, China), and **TRI-S-Audit** (Tashkent, Uzbekistan). For more details about each, see page 3. Be sure you add them to your firm's email lists, and take time to speak with them in person at our upcoming 2015 Annual Worldwide Meeting in Paris.

Speaking of which, I am looking forward to seeing all of you at our largest and most important event of 2015, BKR's Annual Worldwide Meeting at the Westin Vendome in Paris, France, October 31-November 3. **Each member firm receives one free registration**, which includes all of the outstanding business sessions, social events, and group meals. We have every reason to believe that there will be record attendance, so I hope your firm will send several representatives to share ideas and information, and initiate new business ventures with your colleagues from around the world.

For a complete business agenda and program highlights, see page 2, and be sure to visit What's New on BKR's website for detailed information, including links to the online meeting registration and hotel reservation pages.

Be sure to register by **Wednesday, September 16.**

I would also like to take this opportunity to welcome the newest addition to our BKR team,

BKR REFERRALS
YEAR TO DATE

Americas: \$244,929.00
Asia/Pacific: \$24,692.00
EMEA: \$90,361.00

Tim Morris, who was appointed executive director of the EMEA Region, based in London. Tim's background is in the international, diplomatic, and security sectors. He began his career with the United Kingdom Ministry of Defence, and most recently was a director at his own consultancy firm, NJHM Associates Limited. As EMEA's executive director, he is responsible for the development of BKR throughout the region, including actively recruiting new members, enhancing current member services, and encouraging and facilitating cross-border cooperation and service offerings. For more information about Tim, visit <http://www.bkremea.com/People/Executive-Director.aspx>.

Finally, please note that the Executive Office is now collecting 2015 Member Information data, which our by-laws require that you complete on an annual basis. To access the easy online system, just log into Member Services on the BKR website, then click on the Member Information link in the left menu. All firm information will be kept strictly confidential, and will be available only to the Worldwide Board and your respective regional board. It is imperative that you complete the information for your firm no later than September 30 so that the board can review the compiled results at their meeting in November.

See you soon in the "City of Light," where we'll celebrate our successes, learn from our mistakes, and "Light Up a World of Opportunity" for us all!

Regards,

Howard Rosen

PARIS TO HOST 2015 ANNUAL WORLDWIDE MEETING

BUSINESS AGENDA

FRIDAY, OCTOBER 30

EMEA Regional Board Meeting

MONDAY, NOVEMBER 2

Welcome to Paris

Worldwide Chairman's Report

Review and Vote on Audited Financial Statements and Budget

"Génération Tonique" – How They Will Transform Business and Innovation

We've Got It – How to Successfully Run Your Business

International Tax Workshop

Breakout Sessions

Orientation for New/Guest Firms



TUESDAY, NOVEMBER 3

Media Panel Discussion on Global Trends in the Accounting Profession

Around the BKR World in 50 Minutes: Regional Chairs' Panel Discussion

International Tax Committee Update

I Am Your Potential Client

Accounting and Conscious Capitalism: An Integral Approach to Developing Your Firm

The Evolving Technological Landscape: Opportunities and Threats

Closing Remarks and Adjournment

Client Business Development Cocktail Reception



PROGRAM HIGHLIGHTS

MONDAY, NOVEMBER 2

Our keynote speakers, David Baverez and Philippe Tibi, from the Pergamon Campus School of Economics for Leaders and Upcoming Leaders, will discuss how radical innovation will change traditional patterns of production and consumption in the west in their presentation, "Génération Tonique – How They Will Transform Business and Innovation." Following, Dr. Niels Brabandt, founder of NB Networks, a global consulting enterprise, will share his insights on leadership and management in his presentation, "We've Got It – How to Successfully Run Your Business."

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

- How to Leverage Your BKR Relationships
- International Tax Workshop
- Leading Your Firm into the Future
- Managing the New Multi-Generational Staff

TUESDAY, NOVEMBER 3

On Tuesday morning, a media panel will give their unique insights on the global trends affecting accounting firms. Then, Chairman **Howard Rosen** will lead a panel discussion with BKR's regional chairs on worldwide developments. The morning session will conclude with a relationship development session by Martin Bissett, founder of the Upward Spiral Partnership. His presentation, "I Am Your Potential Client," will focus on the reasons clients choose firms and why they stay.

Tuesday afternoon, in his presentation, "Accounting and Conscious Capitalism: An Integral Approach to Developing Your Firm," Philippe Joannis, from the Center for Integral Wisdom, will discuss "conscious capitalism" and share his insights on how the theory can guide accounting firms to develop their business practices with elements of trust, compassion, collaboration, and value creation.

The afternoon will wrap up with technology and innovation specialist at Teamwork.com in Ireland, DC Cahalane, who will present, "The Evolving Technological Landscape: Opportunities and Threats."

Following the chairman's closing remarks, all members are invited to continue making global connections at BKR's Business Development Cocktail Reception, organized by our host firm, **EURUS** (Paris). Invitees will include international business advisors, bankers, law firms, trade commissioners, and other local CEOs, so please make your travel plans so that you may attend to help us spread the word about BKR's diverse global resources for their businesses and/or clients. In addition, if your firm has clients or key business contacts in the Paris area, they are also most welcome to attend the reception. Simply indicate the number on your registration form.



MEMBERSHIP UPDATE

BKR International is pleased to announce the acceptance of **RAO & EMMAR, CHARTERED ACCOUNTANTS** (Bangalore, India), **PRATAPKARAN PAUL & CO.** (Chennai, India), **Fuyun (Fuzhou) Certified Public Accountants** (Fuzhou City, China), and **TRI-S-Audit** (Tashkent, Uzbekistan) into membership.

Established in 1977, **RAO & EMMAR, CHARTERED ACCOUNTANTS** has extensive experience in audit assignments in both the public and private sectors, and is empaneled with a number of banks and government agencies. With 13 partners and a staff of 73, RAO & EMMAR, CHARTERED ACCOUNTANTS specializes in manufacturing, educational institutions, real estate and infrastructure, banks and financial institutions, and other public sector undertakings. The firm has additional offices in Ahmedabad, Chennai, Delhi, Durg, Kolhapur, Mumbai, Pune, and Shimoga.

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Formed in 1985, **PRATAPKARAN PAUL & CO.** offers an array of audit and tax services. With two partners and a staff of 18, the firm specializes in television, real estate development, infrastructure, paper mills, and the auto ancillary industry.

Contact Information:

PRATAPKARAN PAUL & CO.
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25/14, Khader Nawaz Khan Road
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044 2833 1648
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pkpandco@gmail.com

Established in 1996, **Fuyun (Fuzhou) Certified Public Accountants**, along with its subordinate companies, Fuzhou Xinrui Certified Tax Agent and Fujian Zhongchengxin

Engineering Cost Consultation, offers a variety of services, including auditing, tax declaration, planning and consulting, and engineering cost consultation, among others. With three partners and a staff of 59, the firm specializes in manufacturing, real estate, wholesale and retail, IT, and entertainment.

Contact Information:

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Formed in 2003, **TRI-S-Audit** offers an array of audit, tax, compilation, MAS, and review services. With two partners and a staff of 17, the firm specializes in manufacturing, trading, services, banks, and insurance companies.

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REMINDER!

Submissions for the November/December 2015 issue of the BKR International Worldwide Bulletin are due by Monday, October 5, 2015. Electronic formats are preferred for both text (e-mail, Word, or PDF documents) and photographs (TIF or high resolution JPG attachments).

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 > Member Services > BKR Resources > BKR Tools.

BKR IN THE PRESS

BKR International's 2015 scholarship awards have been featured in both *Accounting Today*, available at <http://www.accountingtoday.com/blogs/accounting-tomorrow/news/bkr-international-awards-2015-accounting-scholarships-74999-1.html>, and *CPA Practice Advisor*, at <http://www.cpa-practiceadvisor.com/news/12087172/bkr->

[international-awards-five-scholarships-to-accounting-students](http://www.accountingtoday.com/blogs/accounting-tomorrow/news/bkr-international-awards-2015-accounting-scholarships-74999-1.html).

BKR has also been featured in the *AccountingWEB* article, "How CPAs Can Better Protect Clients' Personal Data," available at <http://www.accountingweb.com/tax/individuals/how-cpas-can-better-protect-clients-personal-data>.

MEMBER PROFILE: EURUS (PARIS)

A Common Vision: To Be a Maker of the Future

Alliance EURUS (Paris) was created from the shared vision of its members, as well as independent firms of chartered accountancy, audit, and consulting. More than a recognized and confirmed chartered accountancy firm, a member of this alliance has to build the future for its customers, employees, and the firm itself.



A Shared Conviction

"The addition of our differences multiplies our capabilities."

Well aware that their diversity is a strength, members of Alliance EURUS share the same ambition, to exercise their abilities as accountants and auditors by pooling their practices, skills, ideas, and experiences.

With their regional anchors belonging to a powerful national and international association, Alliance EURUS members share a dynamic vision of their business, characterized by pragmatism, proximity to customers, and innovation in a changing world.



Why Choose a Maker of the Future?

1. Entrepreneurial Spirit

Because all members of the alliance are also entrepreneurs engaged in their offices, their accountants are fully engaged with the concerns of their customers, with whom they share the ambitions of development and sustainability.

Beyond regularly updated technical skills, the members of Alliance EURUS bring their proposals and dynamism to their customers through ideas, solutions, and innovative actions to accelerate their growth.

2. Customer-Focused

For a member of Alliance EURUS, each client is unique and, as such, must receive a special, personalized, and customized service.



Deeply committed to the spirit of service, Alliance EURUS accountants practice their profession by listening to clients with concern, knowledge, and an understanding of their industries and their business, all to bring them the benefits they really need.

Choosing an member of Alliance EURUS is to choose a future for your business creator.

3. A Human Ambition

Because the quality of a group is the result of the cumulative performance of each of its players, members of Alliance EURUS invest in the human richness of their employees through:

- Attracting talent thanks to partnerships with schools and universities;
- Continuously training employees with innovative programs to develop their techni-



- cal and behavioral skills; and
- Accompanying careers to progress in the member firms of the alliance.

Key Data as of 1 January 2015

Creation: 1989
 42 independent firms
 185 locations in France
 2,700 employees
 240 partners
 270 tax experts
 160 auditors
 Third largest group in France
 Revenue: 235M euros
 BKR Representative of France since 1993

Alliance EURUS information

Form: GIE
 Chairman: Thierry Legrand
 CEO: Delphine Buisson

IN MEMORIUM

Advantage Advisors (Melbourne) regrets to announce that **Adrian Beckwith**, a former senior partner, has passed away.

Adrian was a second generation partner of the firm, which was established in the 1950's.

The firm would like to extend its sincere condolences to Kay, his wife, and family.

REGISTRATION NOW OPEN FOR BKR STAFF TAX TRAINING – LEVELS 3 & 4

BKR is pleased to announce that it has now partnered with 20-20 Services (<http://www.20-20services.com>) to offer two exceptional training opportunities for your tax staff:

Tax Level Three October 21-23

Club Quarters, Philadelphia, PA

Level Three is designed for those who are beginning the transition from tax preparer to tax reviewer and advisor, and for those juggling the role of both preparer and reviewer.

Tax Level Four December 2-4

Club Quarters, Philadelphia, PA

Level Four will advance participants' skills

and knowledge on more complex returns covering divorce, foreign taxes, and state nexus, as well as LLC and Partnerships tax returns. This course also provides professional skills training on managing, supervising, and delegating.

You may send staff to one or both programs, each of which provides 24 hours of CPE. The cost is \$1,200 for each three day program, including instructor fee and course materials, daytime meals, and coffee breaks/snacks. It does not include the nightly hotel room cost of \$159 + tax (October) and \$139 + tax (December), or dinners. Both programs will end at 3:00 p.m. on Friday, so be sure to make flight arrangements accordingly.

To register for Level Three, visit <http://bkr.com/bkr-event.php?Staff-Tax-Training---Level-Three-394>. Please be sure to make your hotel reservation by September 20.

To register for Level Four, visit <http://bkr.com/bkr-event.php?Staff-Tax-Training---Level-Four-395>. Please be sure to make your hotel reservation by November 1.

20-20 offers a unique training curriculum that will engage your staff throughout the three-day program, with hands-on exercises, case studies, and relevant activities. We hope you will take this opportunity to give your staff the professional training they need, and the chance to network and bond with their fellow BKR members around the country.

THE PHONE CALL THAT CHANGED MY LIFE: REFLECTING ON 41 YEARS AT LOUIS PLUNG & COMPANY

by Earl Kaiserman (Pittsburgh)



Earl Kaiserman Tax Partner **Earl Kaiserman** just celebrated his 41st anniversary with **Louis Plung & Company** (Pittsburgh) this past June. To commemorate this milestone, he took a few moments recently to reflect on his first experiences with the firm, and the small decision that changed his life.

* * * * *

"It was 1974, and I had just graduated from college at Penn State. I was looking for my first job as a CPA. I went with a friend to Washington, D.C., for interviews, because the economy in Pittsburgh was less stable at the time. I had a few interviews in D.C. that went very well, and, when I returned to Pittsburgh a few days later, I was ready to start packing up my things to move. I had good prospects.

The only thing that stopped me was a

flashing voicemail on my answering machine (remember those?). The message was from **Donald Plung**, managing partner at Louis Plung & Company. I had never heard of this company before, and the voicemail sounded a bit gruff. Donald asked me to come in for an interview, and, on a whim, I called back to schedule it, even though I thought for sure I would be working in D.C.

The rest is history, so they say.

A few weeks later: my first day as a full-time tax preparer at Louis Plung & Company. I remember walking into the office for the first time. It was a small room with 10-12 accountants, and the furniture looked like it was still from 1921 (when the firm was founded)! Some people didn't even have desk drawers. That didn't matter, though.

In school, you don't learn everything, just the theory, and I had to learn quickly once on the job. On my first day, someone gave me a tax return and said to review what had been done. I was already nervous, so when I went to

replace the roll of tape for my adding machine (adding machines and answering machines, what a time), I dropped the roll! It unraveled all the way down the hall.

But, it got better. I grew as a professional thanks to the guidance and advice from Donald Plung. He was a great man, a great accountant. His clients didn't make a move without him. Louis Plung & Company is an amazing place. There's nowhere else like it. And 41 years later, I am still happy to come into work every day."

* * * * *

Earl's practice is focused on tax compliance and planning for retail, service, and manufacturing companies in the Pittsburgh area, as well as estate planning for individuals and families. He serves on the board of directors for a local synagogue cemetery association and the Hillel student organization at Penn State. Learn more about Earl at <http://www.louisplung.com/index.php/en/earl-kaiserman>.

NICHE NEWS

Affordable Housing

The Affordable Housing Practice Group held a telemeeting on June 29. Topics included updates on recent legislative and tax matters, problems associated with the Repair Regulations during the 2014 tax year, new consolidation guidance issued by the IRS, and other matters related to affordable housing. The group's next telemeeting will be held on September 22.

Canadian Tax

The Canadian Tax Practice Group held a telemeeting on June 23. Topics included T1135 audits, T1135 voluntary disclosures, the group's in-person meeting, Schedule 88s, scanning documents, and the net investment income tax. The group will meet at the offices of Welch LLP in Toronto on September 25.

Future Leaders

The Future Leaders Practice Group held a teleseminar on June 25. The guest speaker was Neal O'Farrell, a renowned security expert who presented a session on "Protecting Your Practice, Your Clients, and Yourself from Cyber Risks and Identity Theft." He discussed why data breaches and identity theft are serious crimes worldwide and suggested ways that individuals can protect themselves, their families, clients, as well as their businesses. The group's next telemeeting will be held on October 5.

High Net Worth Families/Estate Planning

On July 20, Neal O'Farrell, identity theft consultant and executive director of the Identity Theft Council (<http://www.identitytheft-council.org>), presented a one hour webinar on "Protecting Your High Net Worth Clients from Cybercrime and Identity Theft." Neal discussed why cybercrooks are targeting the affluent and how CPAs can help them to minimize their risks.

Human Resources

The Human Resources Practice Group

Telemeeting was held on August 20. **Diana Busche** (Omaha) assumed the chair position as of July 1 and led her first telemeeting. Accountingfly CEO Jeff Phillips presented on "The Playbook for Hiring Experienced Accountants." The audio can be found on our website. The next telemeeting will be held on November 24.

Marketing

The Marketing Practice Group held a telemeeting on August 12. Chair **Delene Taylor** (Louisville) provided a summary of the discussions that took place with the group and guest panelists during the Marketing Meeting held on June 7 in Orlando, Florida. Topics included best practices for social media and blogging, the use of metrics in marketing activities, partners' support for firm marketers, and hot trends in the industry.

Tax (International, Americas Region)

The International Tax (Americas Region) Practice Group held a telemeeting on July 27. In addition to topics to be presented at the upcoming International Tax Workshop on November 2 in Paris, the group discussed case studies involving the NIIT, FBAR for non-resident aliens, the BE-10 Benchmark Survey, and countries offering favorable tax advantages. Their next telemeeting will be held on November 16.

Tax (U.S.)

The two main topics discussed on the July 21 call were the BKR-sponsored staff training for Levels 3 and 4, to be held in the fall, and the group's upcoming in-person meeting. BKR's Staff Training will be held from October 21-23 (Level 3) and December 2-4 (Level 4) at Club Quarters in Philadelphia. (See page 5 for more details.) The group's in-person meeting will be held on November 13 at the Hilton O'Hare in Chicago, with a group dinner the evening before. Consultant Carrie Steffan from the Whetstone Group will kick off a morning workshop on growing your tax practice.

WORLDWIDE BULLETIN

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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 SPONSORS JOINT AUDIT CONCLAVE ON FUTURE OF INTERNAL AUDIT IN KOLKATA

In a bid to address the evolving issues and challenges related to the entire auditing profession in light of recent and forthcoming regulatory changes, The Institute of Internal Auditors of India (IIA India) – Calcutta Chapter along with The Institute of Chartered Accountants of India (ICAI), The Institute of Cost Accountants of India (ICAI), The Institute of Company Secretaries of India (ICSI) organized a two-day joint audit conclave, entitled The Audit of Auditing, at The Lalit Great Eastern in Kolkata on June 11-12, with BKR International as the knowledge partner.

It was a unique conclave where The Institute of Internal Auditors of India also signed an MOU with The Institute of Company Secretaries of India. As stated by Mr. Chandi Prosad Bagchi the president of The Institute of Internal Auditors of India – Calcutta Chapter, this was, hopefully, the beginning of a collaborative effort amongst the professional institutes to meet the forthcoming challenges of the auditing profession.

In what was a definitive session of the



The Signing of the MOU between The Institute of Company Secretaries of India and The Institute of Internal Auditors India

conclave, the leaders from ICAI, ICAI (Cost), ICSI, and IIA India participated in a brainstorming session on the future of internal audit. The session was moderated by **Mr. Subir Dutta**, director of **Doshi, Chatterjee, Bagri & Co.** (Kolkata) and the immediate past president of IIA India. The representatives of all the institutes agreed about the immense potential available for internal audit professionals while also acknowledging the need to identify additional skill sets and technologies.

Eminent speakers from all over India, including a speaker from SEBI, the professional institutes, and from the industry addressed the various technical sessions of the conclave, which were deliberative in nature and often involved interactions from the participants.

Another high point of the conclave was the last session of the conclave, which was an IT Governance Summit that was also moderated by Subir Dutta. Various aspects of IT governance, security, implementation and challenges were deliberated upon by a panel of experts.

Mr. K. Vidyadharan, vice president of the Institute of Internal Auditors – India, mentioned that the Companies Act 1913 mandated that a majority of companies implement financial control-related provisions. According to an IIA-India estimate, around two lakh companies will be required to comply with these new provisions. Subir Dutta said the insti-



Subir Dutta of Doshi, Chatterjee, Bagri & Co. moderates a session on the Future of Internal Audit, along with representatives of four professional institutes in India.

tute was engaged in capacity building. "The new Companies Act has expanded the scope of internal audit to all aspects of business – right from operational, financial, and legal metrics to risk management and also corporate governance. You can't work anymore in a silo. To achieve this, companies need integrated skill sets to undertake control exercises," observed Subir.



The president of The Institute of Company Secretaries of India (far right) in discussions with the vice president of The Institute of Internal Auditors India (far left).

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."

MEMBER NEWS AND NOTES

Baltimore, Maryland, USA

Gross, Mendelsohn & Associates, P.A. is pleased to announce that **Tricia Love Thomas**, CPA and a partner in the firm's Nonprofit Group, was appointed to the board of directors of the Education Foundation of Baltimore County Public Schools. This foundation provides and facilitates community and corporate funding to create, sustain, and invest in a culture of excellence for all students, especially those in the Maryland community.

Bogota, Colombia

BKF International S.A. Auditores y Consultores attended the Third Summit of the National Institute of Public Accountants in Cartagena, Colombia, on August 27-28. The conference focused on assurance standards and IFRS. IFRS Partner **Hernando Ortiz Solano** participated as a speaker on one of the forums. The event was attended by experts in accounting and financial issues, as well as major national and international firms. Firm President **Humberto Fernandez** attended the summit last year.



Participants of the Second Summit of the National Institute of Public Accountants

Charleston, South Carolina, USA

Andrew Duggin's appointment as senior accountant at **Moore Beuston & Woodham L.L.P.** was covered by *Palmetto Business Daily*. Read the full article at

<http://palmettobusinessdaily.com/stories/510549991-andrew-duggan-named-senior-accountant-at-moore-beauston-woodham-in-charleston>.

Houston, Texas, USA

Briggs & Veselka Co. was recently featured in the *Houston Chronicle* at <http://www.pressreader.com/usa/houston-chronicle/20150723/284988263390506/TextView>.

Jacksonville, Florida, USA

The **LBA Group** is pleased to announce a number of promotions.

Curt Castetter, CPA, has been named partner at the firm. Curt focuses his practice on some of the most complex tax strategies the firm's clients face. He works with large, multi-state organizations, as well as small to middle-market entrepreneurial and start-up organizations in industries, such as construction, real



Curt Castetter

principal at the firm. Scott has more than 10 years of experience and leads the firm's employee benefit plan audit practice.

Becky Mincer, CPA, has been named principal at the firm. Becky has more than 10 years of experience with proactive tax planning, business and individual income tax planning and preparation, and multi-state tax strategies.

Mark Klebe, CPA, PFS, CGMA, has been promoted to senior tax manager. Mark has 20 years of experience in public accounting and 12 years of experience in private industry. He focuses his practice on tax services and business planning within the industries of healthcare and real estate.

Daniel Brock, CPA, has been promoted to senior tax manager. Daniel focuses on tax planning and business consultation with a variety of locally held businesses in industries including manufacturing, distribution, consulting, and software.

Therese Zeman, CPA, has been promoted to senior manager, Business Accounting Solutions. She has more than 18 years of experience in tax and accounting, focusing on small

Continued on page 9



Emily Cornaire



Scott Mattson



Becky Mincer



Mark Klebe



Daniel Brock



Therese Zeman

MEMBER NEWS AND NOTES

(Continued)

Continued from page 8

businesses and issues related to start-ups, buy/sell arrangements, growing a company, succession planning, retirement, financing, consulting, tax planning and tax preparation. In her new role, Therese will oversee LBA's Business Accounting Solutions team.

Jennifer Koopman, CPA, has been promoted to senior tax manager. Jennifer provides tax planning and preparation within the industries of healthcare, investment services, professional services, and construction/real estate. Jennifer also specializes in state and local taxation.



Jennifer Koopman

Oksana Gonzalez, EA, has been promoted to tax manager. She has more than 11 years of public accounting experience and works with large, multi-state organizations, as well as small to middle-market organizations, in industries such as professional services, healthcare, and real estate. Oksana specializes in foreign assets reporting, as well as state/local taxation and planning.



Oksana Gonzalez

Lefkosia, Cyprus

Angelos Theodorou of **Euroglobal SEE Audit Limited** was featured on *Gold News* regarding his recent appointment as chairman of BKR's International Tax Committee. Read the article at <http://www.gold-news.com.cy/en/professional-services/euroglobal-angelos-theodorou-chairman-of-international-tax-committee-of-bkr-international>.

London, United Kingdom

Blick Rothenberg LLP's U.K. Budget publications, *Blick Rothenberg Budget Commentary for Businesses*, *Blick Rothenberg Budget Commentary for Individuals*, and *Blick*

Rothenberg TaxFax 2015/2016 are now available on the firm's website. These publications can also be viewed along with press coverage and Twitter comments by visiting the Blick Rothenberg Budget at <http://www.blickrothenberg.com/budget>.

The firm has also released an updated version of its *Establishing a Business in the UK* guide. This comprehensive guide provides information on tax, accounting, and commercial issues that overseas businesses need to consider when looking to set up operations in the UK. Download the document at <http://www.blickrothenberg.com/getmedia/88de44e7-487d-4642-aa71-7598d452c876/Establishing-a-Business-2015-16.pdf.aspx>.

Long Island, New York, USA

Albrecht, Viggiano, Zureck & Co., P.C. (AVZ) has named

long-time partner and 35-year company veteran **Robert (Bob) Quarté** to the newly-created role of co-managing partner. Bob will now share responsibility for vision, direction, and leadership of the firm with



Bob Quarté

Thomas (Tom) Murray, who has served in the capacity of managing partner since 2001. Bob joined the firm in 1980. He leads on a variety of accounting and auditing engagements with clients in the retail, manufacturing, construction, real estate, and distribution industries, as well as Employee Benefit Plan Audits. He provides management advisory services, financial projections, business valuations, accounting systems and controls, estate planning and retirement planning. Tom began his professional career at AVZ and has been with the company since 1977. He assists closely held companies with income and estate tax planning and business succession planning.



Tom Murray

Bob and Tom appeared on LI New Radio's Jay Oliver show (FM 103.9) on July 30 to discuss the firm.

The HIA-LI has named AVZ as the recipient of the prestigious 2015 Small Business Achievement Award. AVZ will be honored at the HIA-LI's Gala Luncheon on September 22.

The firm has promoted five current principals to the role of partner.

Lawrence (Larry) Lucarelli, CPA, CFP, offers areas of specialization in mergers and acquisitions, taxation, and wealth management. He has been with the firm since 1989 and was promoted to principal in 2006.



Larry Lucarelli

Thomas (Tom) Ruggiero, CPA, offers areas of specialization in accounting and auditing, governmental services, and taxation. He has more than 20 years of experience in public accounting and joined AVZ in 1996. Tom was promoted to principal in 2007.



Tom Ruggiero

James (Jim) O'Connor, JD, LL.M., AEP, offers areas of specialization in taxation and estate planning. He joined the firm in 2005 and was promoted to principal in 2007.



Jim O'Connor

Kenneth (Ken) Laks, CPA, MST, provides specialization in taxation. He has more than 20 years' experience working in the field of public accounting. He joined AVZ as a tax manager in 2006 and was promoted to principal in 2008.



Ken Laks

Jill Gunzel, CPA, provides areas of spe-

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MEMBER NEWS AND NOTES

(Continued)

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cialization in accounting and auditing, business and strategic planning, and governmental services. She began her career in accounting with AVZ in 1999 and was promoted to principal in 2011.



Jill Gunzel

Partner Ken Laks published the article, "Tax Equalization for U.S. Expatriates," in the June 2015 issue of *The CPA Journal*, available at <http://bkr.com/cmsAdmin/uploads/tax-equalization-for-u-s-expatriates.pdf>.

Louisville, Kentucky, USA

Jennifer Hughes of **Deming, Malone, Livesay & Ostroff, PSC** was featured in *Accounting Today* and *The Lane Report* regarding her appointment to BKR's Americas Regional Board. Read the respective articles at <http://www.accountingtoday.com/news/firm-profession/people-news-june-26-2015-75029-1.html> and <http://www.lanereport.com/50613/2015/06/dmlo-cpa-to-serve-on-americas-regional-board-of-directors>.



Jennifer Hughes

Luanda, Angola

Partner **Dr. Carlos Pinho** of **ACE – Auditangol Consulting Enterprise, Lda.** participated in a debate about "Micro, Small, and Medium Enterprises in the Economic Diversification" from 10:00 a.m. - 12:00 p.m. (Angola time) on Thursday, July 30, on Rádio LAC (95.5FM) Luanda, Angola.

Mt. Arlington, New Jersey, USA

For the third year in a row, **Nisivoccia LLP** has been named one of NJBiz's Best Places to Work in New Jersey in the small/medium category, coming in 20th. The survey and award program identifies, recognizes, and honors the top places of employment in New

Jersey that benefit the state's economy, its workforce, and businesses.

The Mt. Olive Chamber of Commerce hosted their 2015 Oliver Business Video Awards dinner on March 12. Nisivoccia LLP was pleased to win the award for Best Overall Video.

Nisivoccia LLP was awarded the Best Sales Presentation Video Awards of Excellence by the Metropolitan Builders & Contractors Association of New Jersey. The awards dinner was held on June 11 at the Sheraton Parsippany Hotel.

The New Jersey Society of CPAs and News 12 presented another all-star panel for the News 12 Tax Call-in Program, "Tax Time: Ask the Experts," on April 2. **Marcia Geltman**, CPA, participated again this year.

Harlene Stevens, CPA and Dental Group leader, along with **Laura Lampron**, marketing director, exhibited at the 2015 Garden State Dental Conference and Expo in Princeton, New Jersey.

Marcia Geltman and **Glenn Schwier** presented "An Overview of Federal and New Jersey Tax and Estate Law" in June. The session was well attended by area attorneys.

Nisivoccia LLP is pleased to support local educational institutions of all levels, one of which is Montclair State University. This year, for the first time, Nisivoccia LLP has shown its support by offering a \$1,000 scholarship to an accounting student who achieved higher than a 3.2 GPA within his or her accounting major. **Stephen Van Houten** presented the award to David Cadorett during Montclair's Department of Accounting, Law, and Taxation's Twelfth Annual Awards Ceremony.

Bob Charlton, partner, presented, "Business Structures & Taxes" to the Women's Entrepreneurial Network (WEN).

Nisivoccia LLP exhibited at the annual New Jersey Management Group Medical Association conference again this year in Atlantic City, New Jersey. **Susan Moore**, CPA, and **Matt Cullen**, CPA, participated on behalf of the firm.

Nisivoccia LLP hosted a Certified

Municipal Finance Officer roundtable for clients in May. This session, hosted by **Bud Jones**, Governmental Entity partner, included a hands-on workshop for the "User Friendly Budget."

Nisivoccia LLP held its women's networking event in May. More than 60 professional and women business owners attended to connect, communicate and collaborate.

Deirdre Hartmann, CPA and Healthcare Group leader, presented an update on the Affordable Care Act during a lunch and learn webinar for the Healthcare Financial Management Association.

Nisivoccia LLP held its annual audit preparation session for their clients. Attendees learned what to expect from the process and how to prepare for a successful audit. The seminar was hosted by the firm's governmental partners.

Nisivoccia LLP hosted the May monthly Morris County Chamber Business Connections networking event. Harlene Stevens presented on the top tax questions asked by firm clients.

New York, New York, USA

Anchin, Block & Anchin LLP made *Inside Public Accounting's* 2015 Top 100 Firms list. For the full report, visit <http://insidepublicaccounting.com/newsletters/ipa-100-and-ipa-200>.

Nicosia, Cyprus

Euroglobal SEE Audit Limited is proud to welcome **Ivan Pishmanov** as chief accountant and acting manager at the firm's office in Sofia, Bulgaria.

Paris, France

SFC Group has announced its partnership with the Village by CA, the first cooperative ecosystem space dedicated to innovative startups. SFC Group signed a partnership agreement with the Village by CA allowing them to accompany startups and project managers in their daily entrepreneurial endeavors. In the heart of Paris, the Village by CA is unique to France and Europe. Eventually, up to 100 inno-

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MEMBER NEWS AND NOTES

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vative companies and benefit from their proximity with major partners.

The firm is also organizing a conference dedicated to top athletes and sports clubs. Because image rights are linked to sports law and also to labor law, and because the accom-



The Village by CA allows startups to share knowledge and strategies.

paniment of high-level sports is a major issue, SFC Group organized a conference on how to optimize the advice and rights of images of clubs and elite athletes on June 23 at Cercle des Nageurs de Marseille (CNM). The conference was organized in partnership with the Sports Law Centre (Aix-Marseille University) and with the magazine, *La Provence*.

Omaha, Nebraska, USA

Bland & Associates, P.C. announced that, on May 28, the Bland Cares Foundation hosted its fifth annual Angels Among Us Golf Outing at Tiburon Golf Course. This four-player scramble offers golfers the opportunity to have fun while supporting a great cause. Each team included cart and green fees, hospitality gifts, raffles, dinner, and awards. After event expenses, the firm raised \$20K for Angels, which can help four families of children battling cancer by reducing the stress in their lives so that they can focus on their children, for one year. Go to <http://blandcares.org/angels-among-us-golf-outing-2> to find the winning results. Bland Cares Foundation and Angels Among Us would like to thank everyone who helped make this day such a success and congratulate all of their winners. They look for-

ward to seeing you again next year.

Ottawa, Ontario, Canada

Presented by **Welch LLP** in partnership with the Ottawa Chamber of Commerce, *Ottawa Business Journal*, and Abacus Data, the first Ottawa Business Growth Survey is complete, and the results are in. This survey is the largest and most comprehensive survey of businesses located in the Ottawa region and was designed to get the pulse of its business community. The survey results include overall business confidence, growth rates of local businesses, succession planning, barriers to local economic growth, and capital requirements for local businesses. For more details or to download the report, go to <http://www.ottawabusinesssurveyreport.ca>.

Pittsburgh, Pennsylvania, USA

Louis Plung & Company is pleased to announce that Audit Partner **Joseph Zovko**, CPA, has been appointed as treasurer of the PICPA, Pittsburgh Chapter. Read the full article at <http://www.benzinga.com/pressreleases/15/06/p5627761/louis-plung-company-llp-announces-appointment-of-audit-partner-joseph-z#ixzz3eYUMcfwb>.



Joseph Zovko

St. Louis, Missouri, USA

Conner Ash PC and Martens & D'Angelo, LLC have announced that they have reached an agreement to merge their two practices effective September 1. Martens & D'Angelo, LLC is a local public accounting firm with a long history of serving clients in the St. Louis metropolitan area. It has a diverse client base, which includes: medical and dental practices, law firms, engineering firms, manufacturers, consultants, distributors, unions, contrac-

tors, printers, realtors, and restaurants. Both **John Martens** and **Richard D'Angelo** will become principals of Conner Ash. The combined firm will have more than 45 employees and be located in Creve Coeur, Missouri.



John Martens

Sydney, Australia

Peter Longhurst of **Walker Wayland – Sydney** has written and published a book entitled, *A Simple Thank You: Your Key to Happiness and Success*. The book takes you back to the basic courtesies of interacting with others both personally and in business. It is based on the principle of taking the time to write and say "Thank You" without any intention of getting anything in return. It will help build strong personal relationships and can be used to assist business people grow their business. The book is available from Amazon.com in both paperback or Kindle formats.



Peter Longhurst

Washington, D.C., USA

Snyder Cohn, PC was ranked one of the Best Places to Work for Millennials 2015. More than 3,000 companies were considered, and only 75 made the list! To find the best places to work for Millennials, the Center for Generational Kinetics partnered with the workplace excellence research firm Best Companies Group (BCG), who manages more than 50 "Best Places to Work" programs around the globe. BCG analyzed data from the over 4,000 U.S. organizations that participated in BCG's various programs, including over 500,000 employee surveys conducted in the last 12 months. The firm is very proud of this recognition that acknowledges its leadership, innovation, and commitment to employing the fastest-growing generation in the workforce.

MEETING/TELEMEETING SCHEDULE

2015

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| October 31-November 3 | ANNUAL WORLDWIDE MEETING The Westin Vendôme Paris, France |
| November 13 | U.S. Tax Practice Group Meeting Hilton Chicago O'Hare Airport Chicago, Illinois, USA |
| November 12-13 | BKR Leadership Institute (Session 3) Vdara Hotel Las Vegas, Nevada, USA |
| November 16 | International Tax (Americas) Committee Telemeeting* |
| November 24 | Human Resources Practice Group Telemeeting* |
| November 30 | EMEA Region Tax Meeting Sheraton Amsterdam Airport Hotel Amsterdam, The Netherlands |
| December 1 | EMEA Region Future Leaders Meeting Amsterdam, The Netherlands |
| December 1 | SALT Practice Group Telemeeting* |
| December 2 | Technology (Internal) Practice Group Telemeeting* |
| December 2-4 | Staff Tax Training - Level Four Club Quarters Philadelphia, Pennsylvania, USA |
| December 7 | Managing Partners Roundtable Meetings The Cosmopolitan Hotel Las Vegas, Nevada, USA |
| December 9 | Marketing Practice Group Telemeeting* |
| December 14 | Future Leaders Practice Group Telemeeting* |
| December 14 | Business Valuation Practice Group Telemeeting* |
| December 15 | Real Estate/Construction and Affordable Housing Joint Teleseminar* |
| December 17 | Assurance Services Practice Group Telemeeting* |

2016

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| January 5 | Firm Administrators Practice Group Telemeeting* |
| January 7 | Business Development Practice Group Telemeeting* |
| January 22 | Medical Practices and Health Care Practice Group Meeting Walt Disney World Dolphin Resort Orlando, Florida, USA |
| January 26 | Canadian Tax Practice Group Telemeeting* |
| January 27 | Forensic Accounting/Litigation Support Practice Group Teleseminar* |
| May 3 | Marketing Practice Group Meeting The Roosevelt Hotel New Orleans, Louisiana, USA |
| May 6-9 | ASIA/PACIFIC REGIONAL MEETING Crown Hotel Perth, Australia |
| May 20-24 | AMERICAS REGIONAL MEETING Four Seasons Hotel Toronto, Ontario, Canada |
| June 2-6 | EMEA REGIONAL MEETING Marriott Hotel Vienna, Austria |
| November 12-15 | ANNUAL WORLDWIDE MEETING The Ritz-Carlton Santiago, Chile |

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