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NOVEMBER 11, 2024



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AHSAN AHMED

Partner, Strategy and Transactions
Ernst & Young LLP (EY US)

Ahsan Ahmed is a well-established and recognized partner in strategy and transactions at Ernst & Young LLP (EY US), with a specialized focus in mergers and acquisitions. Over his 17 years with the firm, Ahmed has experience in due diligence, quality of earnings analyses, exit readiness, and capital transactions. He has worked in technology, software, video gaming, gambling, and consumer facing businesses. Ahmed has been a key leader in deals ranging from approximately \$15 million to approximately \$50 billion. He has had a strong focus in strategic and successful acquisitions including projects with well-known technology and media companies.

Ahmed is also a member of EY's Community Engagement team in Los Angeles focused on organizing the firm's charitable giving and not-for-profit board efforts locally. Ahmed is also a mentor to young professionals at the firm, and volunteers as a coach in the local community.

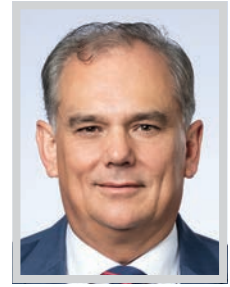


MATTHEW ALBERT

Director
PwC LLP

Matthew Albert is an assurance director in PwC's Technology Media and Telecommunications group, with a focused experience in high growth technology public and private companies. During his 16 years with PwC, Albert has fostered strong and deep relationships across the company's global network. This has enabled him to provide exceptional service to his clients and seamlessly navigate complex issues across diverse geographies, industries and service lines.

Albert has extensive experience in overseeing and executing first year audits, initial public offerings, SPAC offerings and implementation of SOX, in addition to complex technical accounting areas typically associated with growth-stage venture-backed or private equity funded companies. Albert is committed to mentoring his team members by including them in discussions on complex accounting matters as well as judgmental audit methodologies. He fosters an inclusive environment where all questions are encouraged to continue the learning and development experience of his team members.

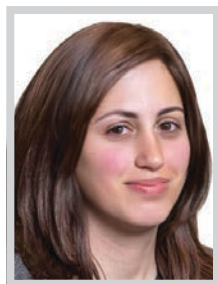


MICHAEL AMERIO

Managing Partner
Lucas, Horsfall, Murphy & Pindroh, LLP

As managing partner of Lucas Horsfall, Michael Amerio provides audit, income tax and business advisory services to privately held companies and individuals in a wide variety of industries, including manufacturing and distribution, construction, insurance brokerage and not-for-profit organizations.

With over 27 years of public accounting experience, Amerio leads by fostering diversity and inclusion in the workplace, always intending to build teams composed of the best candidates for each position, reflecting the diverse society they serve. This is demonstrated in the way he approaches recruitment, retention, advancement, leadership opportunities and family commitments. Amerio gives back to the LA community by volunteering his time and skills to Maryvale, the oldest children's charity in Los Angeles. He joined the Maryvale Board of Directors as treasurer and serves as the chairperson of the finance committee as well as a member of the audit committee.



LIMOR AMRANI

Senior Manager
Manela And Company, APC

Limor Amrani has been with Manela And Company since 2006. As senior manager, she manages and reviews federal, state, individual, corporate, partnership, exempt and trust tax returns as well as provides complex IRS and FTB audit management, estate tax planning and research support for criminal and civil tax controversies.

Amrani has developed firm-wide tax strategies and policies and has provided training and guidance for other CPAs that have joined the firm. More recently, she has assisted clients in obtaining large refunds due to the CARES ACT's retroactive 5-year NOL carry-back provision. She has also prepared memorandums for clients to assess their eligibility for the Employer Retention Credit. A proud mother of four children, Amrani has successfully navigated raising a family while assisting her clients and the community in securing income and property tax exemptions for schools and synagogues.



RUTH BALDAUF

Controller
Partner Engineering and Science, Inc.

As controller at Partner Engineering and Science, Inc., Ruth Baldauf has been a driving force behind its financial growth and operational excellence for nearly 14 years. Her strategic acumen was prominently displayed during the company's largest acquisition of Birdsall Services Group in 2013, when she seamlessly managed the integration of complex financial elements.

Baldauf's innovative approach extends beyond traditional accounting roles. She has spearheaded multiple critical software implementations, including migrations to Microsoft Dynamics GP and Deltek Vision, demonstrating a commitment to leveraging technology for enhanced financial management and reporting. Her open-door policy fosters a collaborative environment, nurturing talent within her team and across departments. Beyond her professional achievements, Ruth's commitment to the accounting profession is evident through her past service as a director on the board of the Los Angeles Chapter of CalCPA (from 2012 to 2015).



TYSON BEEM

CEO
Gelfand, Rennert & Feldman LLC

As the CEO of Gelfand, Rennert & Feldman (GRF), Tyson Beem is responsible for maintaining significant client relationships and for the firm's growth and collaboration across all offices both in the US and the UK. Beem joined the Los Angeles office of GRF in 1998 shortly after graduating from the University of Southern California. He obtained his CPA license in 2003, was named a partner in 2012 and the CEO in 2022.

Beem has been recognized as one of the entertainment industry's top business managers by The Hollywood Reporter, Variety and Billboard. He brings a unique perspective to offer a diversified roster of clients including directors, producers, actors, writers, composers, recording artists/performers, singer/songwriters and executives. Additionally, he actively participates in local college recruiting efforts to create business management and royalty accounting job opportunities for recent graduates.

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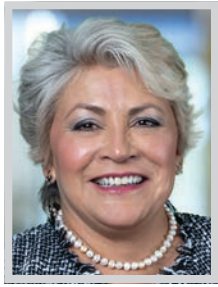
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RUTH CANTU

Director, Tax and Accounting

Gerber Kawasaki Wealth and Investment Management

As director of tax at Gerber Kawasaki Wealth and Investment Management, Ruth Cantu oversees a team of accountants to provide the most efficient level of service to the company's hundreds of clients. Cantu is a seasoned tax professional with over twelve years of experience in public accounting, specializing in high-net-worth trusts and estates, serving both public and private companies. As director of tax and accounting, Cantu delivers high-quality financial, administrative and operational results through streamlined operations and team structures. Her expertise spans federal and multinational tax planning, compliance and reporting. She excels in navigating complex tax regulations, optimizing tax positions and providing strategic tax advice.

Cantu volunteers her time and expertise to various non-profit organizations by providing pro bono tax services and financial education. She currently serves as the vice president of memberships for the board of Financial Executives International's LA Chapter.

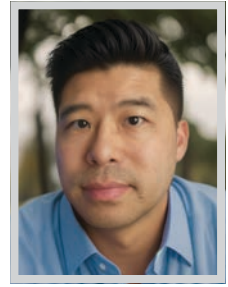


DEBBIE CHAN

Tax Principal
BDO USA

Debbie Chan has solidified her reputation as a top accounting professional in Los Angeles, with nearly 30 years of experience developing and implementing essential tax compliance and consulting services for her clients. In 2022, Chan was named a principal in the Private Client Services (PCS) group in BDO's Los Angeles office, an achievement owed to the significant emphasis she places on client relationship building. She is an indispensable resource for the high-net-worth individuals she serves, continually helping them overcome tax risks and identifying growth opportunities by providing support with federal and state tax planning and compliance, IRS and state audits, merger and acquisition transactions, international tax filing issues, and more.

Chan's commitment to strong relationships has helped her grow the PCS group into a robust practice since she joined the firm. She closely collaborates with the practice team to manage projects and ensure they maintain a high degree of organization and technical competency.

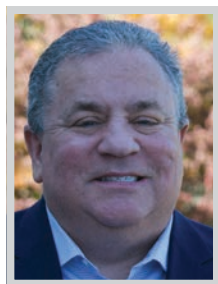


ERIC CHIN

Chief Financial Officer
Akido Labs Inc.

Eric Chin, CPA, serves as the CFO for Akido, overseeing all accounting and finance. Previously, he was the CFO and held several financial and operational leadership positions at ApolloMed (now Astrana Health) and its subsidiaries, including interim co-chief operating officer and corporate secretary. Chin also held accounting leadership roles with Public Storage, Alexandria Real Estate and EY.

Over the past year, Chin led the financial efforts to finalize the acquisition of Rhode Island Primary Care Physicians Corp (RIPCPC) and integration into the Akido organization, expanding the company's medical network to the East Coast and doubling the patient base to nearly half a million. He now serves on the RIPCPC Board of Directors as the treasurer and secretary. Chin is also serves as a volunteer member of the Board of Directors for the Chinese Chamber of Commerce of Los Angeles, and as a volunteer mentor with the UCLA Alumni Association.



KEVIN CONNER

Managing Director

CA Advisory Group

Kevin Conner founded and is the managing director of CA Advisory Group, a member firm of Conner (CA). This group of professional services firms provides corporate restructuring, tax, and litigation consulting services on behalf of public/private companies, investment firms and high-net-worth individuals. Conner is also a founding general partner with Bowman's Tower Venture Partners and Westrock Capital Partners, where he invests in and actively advises early-stage and growth-stage companies in various sectors, such as fintech and life sciences.

Conner leverages his expertise in financial analysis and valuation, deploying his leadership skills to identify and advise promising and innovative ventures. Currently, he is a strategic advisor to The Medici Project and HeartPass Technologies, two impact startups that aim to address the secondary market in Web 3 investments and medical-grade cardiovascular healthcare.



JOHN CRAIG

Controller

Create Music Group

John Craig started his career in public accounting as an auditor at Moss Adams, and joined data-driven music and technology company Create Music Group in 2019, for which he now oversees a department team as a controller. Craig helped build his accounting team from the ground up, establishing the necessary processes and policies to effectively manage accounting procedures. He ensured accurate classification and recording of transactions while delivering timely financial statements and reports.

Craig is always seeking ways to increase efficiency and raise standards. He created a new financial reporting package that addresses the needs of the company's innovative services, follows accounting best practices, and is clear and digestible for board members and leadership to enable them to make more informed decisions. In addition, Craig led the initiative to revamp the royalty payment processes, which implemented new tools and procedures making the platform more accessible and efficient for artists.



MICAH DEKOFSKY

Partner; Audit Leader, Media & Entertainment Industry

Grant Thornton

For nearly 20 years, Micah Dekofsky has used a wealth of industry knowledge to guide LA companies in the technology, media and entertainment sectors. Every day, Dekofsky works with executives at professional sports organizations, TV/film/music groups, content publishers, AdTech providers and technology platforms as they chart a successful future for their business. He has consistently provided strategic support and leadership during industry upheavals, including the COVID-19 pandemic, changing regulations over taxation and privacy, accessibility of capital and quick-moving shifts in technology.

Dekofsky has helped Grant Thornton lead in the middle market and experience significant growth year over year, winning and serving marquee publicly traded, private-equity backed and family-owned companies. Additionally, Dekofsky has been a member of the board of directors for JVS SoCal, a non-profit organization that offers training, mentorship and expert career guidance to individuals seeking sustainable careers.

THE DAVID NAZARIAN COLLEGE OF BUSINESS
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Tuesday, November 19 | 4:00 p.m. - The Soraya



Keynote Speaker

Jesús Mantas

Global Managing Partner for
Business Transformation Services



Panelists



Karina Montilla Edmonds

Senior Vice President, Global Head of
Academies and University Alliances



Cameron Kinloch

CFO



Utpal Mangla

General Manager
Edge Computing and Distributed Cloud



Stephen Cheung

President
LAEDC and the
LA World Trade Council



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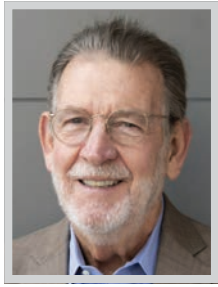
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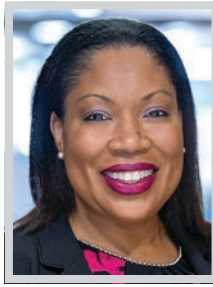


KIP DELLINGER

Senior Tax Partner
Kallman + Logan & Company LLP

As senior tax partner of Kallman + Logan & Company, Kip Dellinger handles and oversees tax quality and risk management for the firm. He is a nationally recognized expert in tax practice, and has represented several of the country's largest firms including Big 4 CPA firms on multiple occasions. Dellinger also consults with insurance carriers and law firms on matters involving regulatory conduct issues.

In past three years, Dellinger has represented KPMG Canada, PwC Armanino, and Forvis along with 15 local and regional firms. His testimony regarding CPA standards of care in *Tricarichi vs. PricewaterhouseCoopers* was instrumental in PwC's successful defense of a multimillion-dollar malpractice claim in 2023. In the past two years, Dellinger has written three articles for *The Tax Adviser*, and was published in *CalCPA Magazine*, *CAMICO's IMPACT*, and the *Illinois Society of CPAs'* magazine. Dellinger teaches nine *CalCPA* in the areas of tax ethics and tax procedural matters.



TAYIIKA DENNIS

Principal
CLA LLP

Tayiika M. Dennis, CPA is a proud and dedicated member of the Los Angeles accounting community, and an inspirational trailblazer for the pipeline of future CPAs. She is dedicated to servicing nonprofit organizations, providing audit, tax and consulting services. She specializes in social service organizations and foundation, with a focus on revenue streams and compliance.

Dennis was recently named a *Forbes America's Top 200 CPA* honoree for her years of service to her firm and *CalCPA*, and notably for her viral redefining of the acronym of CPA to include a double meaning: 'Coolest Profession Around.' Dennis is also a *CalCLA LA Chapter Scholarship Committee* member and current *AICPA Council* meeting member. She currently mentors six professionals in her firm, helping them navigate their career in a firm full of opportunities.



GARY DIAMOND

Partner
Fishman Block + Diamond

With over 45 years of experience, Gary Diamond provides a wide spectrum of high level financial and tax services to his clients. He represents businesses in a variety of sectors, including wholesale, manufacturing, distribution, import and export, real estate, retail, non-profit, healthcare and entertainment. Diamond specializes in personal and business advisory consulting, which requires analysis of the client's short and long-term goals and then combines analytical and creative strategies to address and achieve these goals.

Diamond is a strategic partner who collaborates closely with his clients to turn their dreams into achievable objectives. He empowers his clients to make informed decisions, guiding them toward financial stability and growth which leads to long-term success. Additionally, he serves on a committee for *LAJ Health* focused on raising funds for the *Jewish Home*.

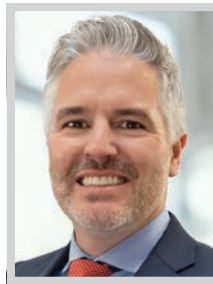


VAN GERARD DICHOSO

Partner; CFO; Executive Producer
River Rock Films, LLC

Van Dichoso is a practicing CPA in the entertainment industry, while also a co-owner of *River Rock Films, LLC*, a television and motion picture production company. Naturally, he is also the company's CFO, overseeing accounting, tax and internal budgets for its films productions, including overseeing the financial aspects of the production itself.

Dichoso first established the CPA firm *Dichoso and Company, CPA, Inc.* in 2001. The practice then concentrated on small business startups, assisting new business owners in complying with the myriad of ever-changing accounting and tax regulations required from the local, state and federal government levels. The CPA firm now serves a wide variety of individuals and business industries, including Hollywood entertainers and movie producers; and international and multi-state corporations within the industries of manufacturing, retail, beverage & restaurants, and professional services (law firms and medical practices).



NATHAN DICK

Principal; Assurance Market Leader
BDO USA

As assurance market leader at *BDO*, Nathan Dick's expertise in managing complex client portfolios, leadership amid global economic uncertainties, and mentorship set the standard for others to follow. Dick's leadership played a key role in *BDO'S* ability to grow its local market share during *COVID-19*. His focus was to strategically position the firm's offerings to focus on key industries. This allowed his team to leverage their deep understanding of complex financial frameworks and proficiency in designing tailored audit services, enabling them to help their clients navigate intricate regulatory environments.

By prioritizing these industries where the firm could provide the most value, Dick developed a growth strategy to target upmarket prospects and facilitate strategic relationships with potential clients. Under his management, the *LA assurance office's* net revenues increased by over 30%. Dick's commitment to aligning industry groups and strategic investments has amplified the firm's effectiveness, translating into bottom-line growth and increased market prominence.



ARIEL E. DRACHENBERG

Tax Partner
Lucas, Horsfall, Murphy & Pindroh, LLP

Ariel E. Drachenberg has significantly impacted *Lucas, Horsfall, Murphy & Pindroh* through his exceptional commitment to staff development and creating a family-friendly environment. Drachenberg provides personal tax planning and business advisory services to closely held corporations and high net worth individuals, helping clients minimize the total impact of business, income and estate taxes. He specializes in the areas of professional service corporations, estate and fiduciary taxation, real estate development and management, not-for-profit entities and multi-state activities. As an advocate for employees, Drachenberg tirelessly promotes professional growth and ensures a supportive workplace culture.

As a past president of the *Southern California Accountants San Fernando Chapter*, Drachenberg played a pivotal role in advancing the profession and supporting local initiatives. Currently, he serves as the treasurer of the *Glendale Health Free Clinic*, where he contributes to providing essential financial guidance so the clinic can continue servicing to underserved populations.

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STEVEN A. EDWARDS

Partner, Audit Services; West Region Consumer Products Leader
RSM US LLP

Steven A. Edwards has over 30 years of experience serving domestic and international clients. At RSM US, he serves as the consumer products industry leader for the West Region supporting regional offices across sectors such as food and beverage, restaurants, retail, and apparel.

Edwards' expertise in complex accounting and SEC reporting is highlighted by his significant experience with IPOs for companies listed on Nasdaq and the New York Stock Exchange. His proficiency in International Financial Reporting Standards (IFRS) and extensive background with multinational companies underscores his role in global finance, adeptly bridging diverse accounting practices and business cultures. Edwards collaborates closely with industry and trade organizations, offering a unique perspective, valuable insights, and sound business advice to clients in the industry. He brings a firsthand understanding of the strategic and operational challenges that businesses face, enabling him to provide expert guidance on complex financial regulations and industry-specific issues.

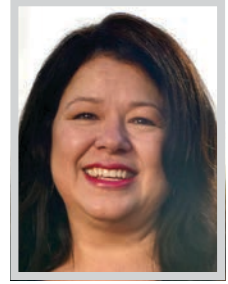


KAYO ELKNER

Principal
Prager Metis

Born and raised in Japan and fluent in Japanese, Kayo M. Elkner is a principal in the Accounting and Tax Departments of Prager Metis, a member of Prager Metis International Group, and an accomplished CPA with over 20 years of experience in the accounting industry. Elkner specializes in accounting and tax services to individuals and closely held businesses, and has prepared individual, corporate, S corporation and partnership income tax returns for clients in the US and internationally, including Japanese clients headquartered in Hawaii and California. Elkner is also a member of Prager Metis' Japan group.

Elkner's leadership skills and technical abilities were quickly recognized, leading to her current role at the company. Her influence extends to the Japanese Global Services Group, where she plays a key role in bridging cultural gaps and fostering collaboration.



SONIA ESTRADA

Accountant
Los Angeles Economic Development Corporation

Sonia Estrada's 34 years of dedicated service have been transformative for the Los Angeles Economic Development Corporation. She began her journey at a time when there was no accounting department and played a pivotal role in its establishment and development. Under Estrada's leadership, the department transitioned from manual processes to full automation, achieving a completely paperless office.

Estrada's meticulous financial management has directly supported the LAEDC's ability to deliver significant impacts across the city. Her efforts to keep its programs fiscally managed have enabled the retention of over 3,270 jobs, provided technical assistance to more than 1,100 businesses that generated over \$226.9 million in economic output. Additionally, her work has been crucial in securing over \$19 million in state funding for inclusive economic planning that will create a stronger economy for all residents.

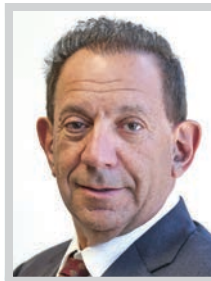


GERRI FEDOROFF

Tax Manager
Foumberg, Juneja, Rocher & Company

As a professional in the field for 36 years, Gerri Fedoroff serves a wide range of clients, from high-net-worth business owners and Fortune 500 companies to smaller firms. She earned her reputation as the model of efficiency by preparing more than 1,000 tax returns per year. As tax manager at Foumberg, Juneja, Rocher & Company, she prepares tax returns and tax projections, handles correspondence and audits from various governmental agencies, and supervises the firm's staff accountants in addition to reviewing their work product.

Fedoroff has mentored and trained hundreds of accountants over the course of her career. All new hires coming to the firm are trained by her directly. Additionally, she has given pro-bono accounting services for over 17 years for numerous clubs and committees at both schools and her church.

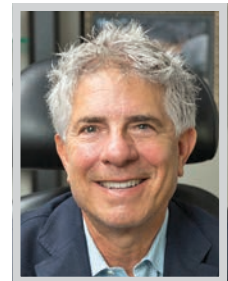


COREY FISCHER

Firm Managing Partner
Weinberg & Company, P.A.

Since taking the helm as firm managing partner of Los Angeles-headquartered public accounting firm Weinberg & Company, Corey Fischer has focused on attracting a diversified team of audit professionals who share his goal of technical excellence and providing exceptional personal service to clients as well as technical expertise and high ethical and business standards.

With extensive experience working in-house with public companies, raising public and private capital, and advising on strategic acquisition, Fischer serves clients by guiding them through the complexities of compliance and financial reporting. He is widely recognized for his technical expertise and high ethical and business standards. Under Fischer's leadership, the company has evolved into a CPA firm renowned for its skill and expertise in guiding companies through their transition to the public markets. Fischer is a member of the American Institute of Certified Public Accountants and the California Society of Certified Public Accountants.



STEVEN FISHMAN

Partner
Fishman Block + Diamond

Steven Fishman has over 45 years of experience, specializing in real estate and high-net-worth tax planning. His expertise extends across a diverse spectrum of tax, strategic and financial planning services.

Fishman is a trusted advisor to family office and real estate private equity sponsor clients with a focus on multi-generational wealth transfer, trust and estate tax returns, trust administration, private foundations, private real estate funds and structure planning, and assistance with complex transactions and issues. One of Fishman's key strengths is his ability to forge strong relationships with his clients by genuinely listen to them and understanding their goals, enabling him to provide highly personalized guidance. Fishman is also a past president, board member, chair of the strategic planning committee, and member of the HR committee for the Stephen Wise Temple.

**CONGRATULATIONS TO
MARIJANE KANTZABEDIAN,
LIEL SHEMTOV, AND JUN WANG
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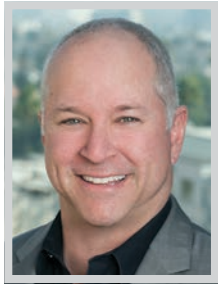
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GLENN FRANK

Partner

David Weise & Associates, A Division of NKSFB

As a once-aspiring musician, Glenn Frank brings a unique combination of accounting expertise and passion for music to his role as a tax partner at NKSFB. With over 30 years in the entertainment industry, Glenn shares his proficiency in international and domestic tax compliance matters, providing guidance to some of the entertainment industry's biggest names.

In conjunction with the firm's tour department, Frank consults on tax and business management issues that affect both the firm's international and domestic clients doing business locally and abroad. Frank also specializes in tax planning and consultation for high-net-worth entertainers, structuring business entities, contract negotiations in consultation with counsel, and tax audit representation. He has been interviewed by Music Connection Magazine, where he offered his insights on personal financial and tax planning for musicians.

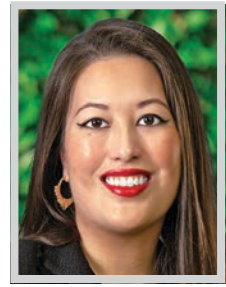


DAMON FRIER

Principal, Partnership Tax Solutions
Grant Thornton

For 30 years, Damon Frier has been creating new possibilities for clients across a broad swath of industries. He has worked in a variety of key leadership roles for Grant Thornton since 2003. His knowledge of many unique industries allows him to slot in where he is needed most and make an immediate impact for his clients.

Frier has helped his firm land and serve multiple premier LA clients in fields like entertainment and sports. Most recently, he assumed a new role as a partnership tax principal after many years as a partner in the firm's Federal Tax practice. In the latter role, he specialized in corporate and partnership tax planning, mergers and acquisitions, inventory and accounting method planning, as well as income tax audit defense for private equity-owned and family-owned businesses whose revenues ranged from \$25 million to \$2 billion.

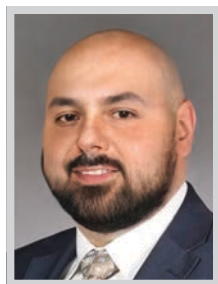


CHRISTINA FUNG

Senior Manager
GHJ

Christina Fung, CPA, ABV, CFE, is a senior manager at GHJ and an emerging leader in the firm's Forensic Services Practice. With seven years of public accounting experience, Fung has quickly established herself as a trusted expert in forensic accounting and a strong advocate for diversity and empowerment within the industry.

Fung assists clients with complex litigation support, forensic and fraud investigations, economic damages, business valuations and partnership disputes. Her work spans various industries, including technology, entertainment, real estate and healthcare, making her a versatile and knowledgeable advisor. Since joining GHJ, she has been promoted twice in three years and plays a key role in managing the Forensic Services team, providing oversight, guidance and mentorship to her colleagues. In recognition of her contributions to the firm and the accounting profession, Fung was named the 2023 Young Accountant of the Year at the International Accounting Forum and Awards in London.



GARY GALSTYAN

Founder; Principal; CEO
Rockwell Capital Group

Gary Galstyan is a trusted financial management and planning expert with nearly 15 years of experience, with a focus on small business accounting, bookkeeping, payroll services, business management, CFO services, financial advisory, tax preparation for businesses, and corporate compliance. Galstyan founded Rockwell Capital Group in 2010 and has since provided personalized, client-centered financial services to businesses and individuals across Southern California. Under his leadership, Rockwell Capital Group has become a premier financial services firm offering world-class financial solutions to a diverse portfolio of clients, ranging from startups to established enterprises.

Galstyan has played a pivotal role in transforming the financial landscape for numerous businesses, consistently helping clients optimize their financial performance, streamline operations, and maximize profitability. Additionally, he is also a sought-after speaker and advisor in the financial sector, regularly contributing thought leadership on trends and regulatory developments.

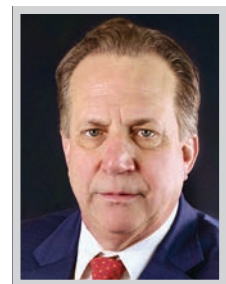


MARA GARCIA

CFO
Phonexa

Phonexa CFO Mara Garcia has significantly elevated the company's financial performance throughout her tenure. Her leadership has been instrumental in driving growth and innovation at Phonexa and transforming financial data into actionable intelligence that fuels technological advancements.

Garcia's ability to interpret financial trends and anticipate market shifts has consistently positioned the company ahead of the curve amid the economic downturn. Through her prudent risk management and transparent communication, Garcia has fostered trust and confidence among stakeholders, ensuring a robust financial foundation. Over the last year, Garcia has been recognized as a shortlisted nominee by Los Angeles Times B2B Publishing for its CFO Leadership Award as well as a CFO to Watch by the San Fernando Valley Business Journal. She has continued to make significant strides with the Forbes Finance Council, all while helping shape strategic partnerships for Phonexa with leading financial institutions like Corpay, Stripe, Tipalti and others.



PETE GAUTREAU

Managing Partner
Falcon Wealth Tax

Having served as a mentor to many aspiring CPAs over the years, Pete Gautreau holds the position of primary recruitment director for Falcon Wealth Tax. He is responsible for presenting career opportunities to students as they navigate their unique paths within the financial industry.

After accumulating numerous years of experience in providing tax and attestation services in his public accounting career, Gautreau transformed into a specialized tax planner, honing his expertise in this area. His ultimate objective is to maximize tax savings for his clients through the implementation of well-crafted tax strategies. Furthermore, Gautreau ensures that his clients gain a comprehensive understanding of the plan's concepts and the advantages it offers. He actively guides them through the execution of the plan, offering his expertise and support every step of the way.

Armanino is honored to be recognized as the Los Angeles Business Journal's

Diversity, Equity and Inclusion (DEI) *Firm of the Year!*

Congratulations to our esteemed team members,
Ken Teasdale and Renee Ordeneaux for being among the
Top 100 Accountants in 2024.



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accounting to new heights and redefining what's possible!*

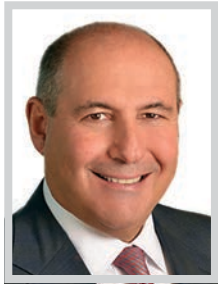
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2024 HONOREES

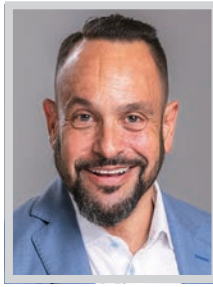


JAN GOREN

Co-Managing Partner
Citrin Cooperman Advisors LLC

For over 48 years, Jan Goren has provided business and tax consulting, tax planning and litigation support to a diverse group of clients. A partner in Citrin Cooperman's Los Angeles office, Goren has demonstrated his commitment to superior client service by working with individuals and businesses to tailor plans optimally suited for them, and consistently providing high-quality deliverables.

Goren is certified in financial forensics and has worked on over 400 matters as a consultant or expert witness. With a litigation focus, Goren engages in complex case analysis relating to damage computation, lost profits, accountants' malpractice, and criminal matters. He has also assisted law enforcement and testified on behalf of the United States government. Prior to joining Citrin Cooperman in 2021, Goren was a founding partner of Goren, Marcus, Masino & Marsh.



HOWARD GROBSTEIN

Managing Partner
Grobstein Teeple LLP

Native Angeleno Howard Grobstein has been a local, trusted expert in forensic accounting and fiduciary support for over thirty years. A graduate of California State University, Northridge, his experience began by serving various clients in Los Angeles and Orange County in the early 1990s. Grobstein swiftly became a lead partner, honing an entrepreneurial edge in the accounting profession and finding creative ways to serve clients beyond the transactional opportunities typical of a consulting practice.

In 2013, he formed Grobstein Teeple LLP, an accounting and consulting firm headquartered in Los Angeles. Under his leadership as managing partner, the firm has expanded from eight to over fifty professionals, offering full-service accounting and consulting services to individuals and middle-market businesses. Grobstein specializes in all matters of business consulting, including business valuation, business management, back-office accounting, fractional CFO services, transactions and due diligence.

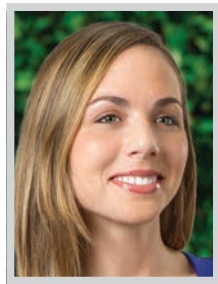


VISHAL GUPTA

Partner
Ernst & Young LLP (EY US)

As a partner at EY, Vishal Gupta provides expertise in US generally accepted accounting principles, implementation and testing of internal controls over financial reporting in accordance with Sarbanes Oxley Act (SOX), and evaluation of business processes. He also provides valuable insights to improve efficiency of operations and effectiveness of internal controls.

Gupta's vast audit experience includes SOX start up, quarterly reviews (10Q), purchase accounting, bond financing/refinancing, and year end reporting (10k, press releases). Over the course of his career, Gupta has gained an in-depth exposure to the business environment across various industries including health-care, biotech, manufacturing, software, real estate and mining industries. He has lead projects that involve a close cooperation not only with other EY departments (such as transaction advisory, technical advisory, tax, IT and legal) but also with external attorneys, investment bankers, and financial institutions.



FRANCES ELLINGTON GUTIERREZ

Partner
GHJ

Frances Ellington Gutierrez, DBA, CPA, is the State and Local Tax Practice leader at GHJ, specializing in multistate income and franchise tax, indirect tax, and credits and incentives. With over a decade of experience, Gutierrez has significantly impacted the organization and the broader accounting profession through her tax advisory leadership, innovation and contributions.

Gutierrez develops tailored tax planning strategies that have saved clients millions, and guides her team through complex tax issues, helping clients navigate multistate regulations with confidence. Under her leadership, the State and Local Tax Practice has expanded, becoming a trusted resource for businesses across various industries. Gutierrez shares her expertise through teaching and publications, frequently contributing valuable insights that influence the accounting field and support the ongoing education of her peers. She served on the City of Santa Monica Audit Subcommittee and is a director on the Los Angeles Chapter Board of CalCPA.

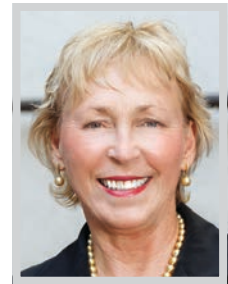


KEITH HAMASAKI

Partner, Audit & Assurance, EisnerAmper LLP
Partner, Eisner Advisory Group LLC

As a partner in the EisnerAmper Los Angeles office, Keith Hamasaki is responsible for the Los Angeles attest practice. With nearly two decades of experience providing audit and accounting services to real estate, private equity funds, and middle market companies, Hamasaki is recognized as a key thinker and industry speaker on topics of business and accounting issues.

As a leader in the office, Hamasaki instructs his team on audit methodology and analytical review procedures, including the creation and implementation of a task completion manual to streamline processes. Hamasaki was appointed as trustee of the California Society of Certified Public Accountants Education Foundation, and has served as a board member for the CalCPA Los Angeles Chapter since 2015. He is president of the Business Alumni Chapter at CSUN, and a founding governor and current vice president of the Asian Hall of Fame.



PATRICIA BELL HARIK

Managing Partner
Harik Thompson

Patricia Bell Harik currently holds the position of Managing Partner at Harik Thompson CPAs, where she is responsible for leading the tax department and specializes in tax consulting, estate and trust planning and administration, as well as family wealth and business succession advisory services. Harik is dedicated to staying well-informed and refining her expertise in the constantly evolving field of estate planning and is an active member of the South Bay Estate Planning Council. She earned a bachelor's degree in business/economics and French literature from the University of California at Santa Barbara, and her master's degree in taxation from Golden Gate University.

In addition to her professional commitments, Harik is deeply involved in community service as a board member of the Torrance Del Amo Rotary, where she actively engages in various initiatives such as working with students, international and local humanitarian projects, foreign exchange programs and outreach.



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At KPMG, we never underestimate the power of dedicated people. That's why we want to recognize Tom Klockner, Michael Mehanna, and Casey Winters for their outstanding contribution to the accounting industry. You've exceeded expectations and made a positive difference in the lives of so many. Discover more at [kpmg.com](https://www.kpmg.com)

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GEORGINA HARRIS

Principal
Baker Tilly

Georgina Harris has 20 years of diversified public accounting experience serving companies in a variety of religious and cultural organizations, associations, foundations, social service and charitable agencies, and educational institutions, including ones subject to OMB Circular A-133 audit requirements.

With Baker Tilly, Harris leads all aspects of audit, review and compilation engagements including planning, assessment of internal controls, analytical reviews, budget preparations and audit execution. She also reviews and analyzes financial statements and related footnote disclosures to follow US GAAP. During the pandemic, she worked with other senior leaders to develop a list of priorities and solutions to keep business operations steady. Harris has consistently demonstrated her passionate for gender equity in the workforce. Throughout her career, she successfully ran multiple forums and raised more than \$6,000 to be donated to local female-focused not-for-profit organizations.

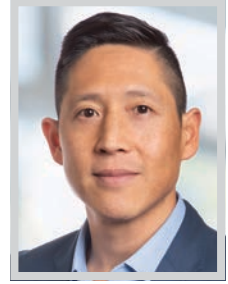


LARRY HAWORTH

Partner
Eide Bailly LLP

Larry Haworth serves as partner of Eide Bailly and has been an accounting professional for more than 40 years. His first 25 years as a professional were spent as an audit and tax practice leader. He led the audit practice for two large regional firms. In addition to serving in firm leadership, he continues to manage a full book of client work.

In 2007, Haworth co-founded and two other colleagues successfully created, launched and managed a full service accounting firm, Bessolo Haworth, in Sherman Oaks. Today, having teamed with Eide Bailly, a Top 25 CPA and business advisory firm in the nation with offices all over the country, Haworth continues to be known for his mentorship and employee development experience and results. He understands how to both grow client revenue while simultaneously training staff members to take a leadership role in client service.



STAN HUANG

Partner
Crowe LLP

Stan Huang is a seasoned transaction consultant and LA native with nearly two decades of experience driving successful middle market deals. He provides services related to due diligence, transaction structuring advice, work capital negotiations and purchase price allocation. Huang has been instrumental in building a thriving local transaction consulting team from the ground up for Crowe. He has been pivotal in expanding the client base, increasing deal volume and developing talent for the company's transaction advisory practice which recently expanded to Southern California.

Huang also implemented an individualized mentorship program to create a workplace where all team members feel valued and empowered. As a member of Ascend (a global network advancing Pan-Asian professionals in the workplace) and a board member of the Society for the Promotion of Japanese Animation, Huang is actively involved in giving back to the community and promoting diversity and inclusion in the broader business landscape.

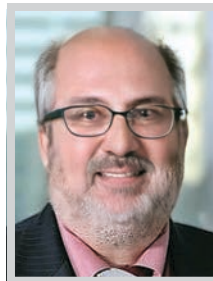


MARTIN HUGHES

Partner
Moss Adams

Martin Hughes has practiced public accounting since 1986. He joined Moss Adams in 1989, transferring from an affiliate office in Ireland, and was promoted to partner in 1998. Hughes provides assurance and consulting services to privately held and public middle-market clients in the apparel, retail, and manufacturing and distribution industries.

Hughes has extensive experience with accounting, auditing, and general business and management issues, as well as conducting large international group audits. He is a member of the Advisory Board for the CSUN Nazarian College of Business Accounting Program, and a board member for City of Hope, American Institute of CPAs and California Society of CPAs. He has industry experience across various sectors, including apparel, e-commerce, and manufacturing & consumer products.

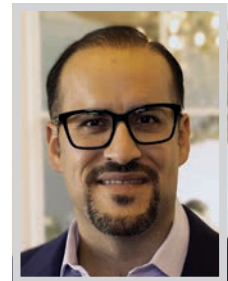


JEFFREY HYLDAHL

Partner
Fineman West & Co LLP

Fineman West & Co LLP has been in operation for over 25 years and has gone through many changes. One of the most stable and influential factors to the firm's success is the leadership of Jeffrey Hyldahl. In his position, Hyldahl has consistently demonstrated a forward-thinking approach that prioritizes inclusivity, innovation and the well-being of the firm's team. He provides his clients full-service consultation, including financial reporting for audits and reviews, obtaining financing, financial benchmarking, profitability studies and reconciliations, financial forecasting and projecting, tax planning and compliance, and tax audit representation.

Under Hyldahl's leadership, the firm has consistently and actively supported several non-profits including the California Hospital Medical Center, Asian Pacific Community Fund, National Jewish Health and many more. Hyldahl is also actively involved with The Professionals Club and TAG Alliances to help advance and provide insights to fellow professionals serving in similar industries.



ROBERT HYMERS

Managing Partner
Pinnacle Tax Services

Robert Hymers is the founder and managing partner of Pinnacle Tax Services, Inc. and specializes in providing tax and accounting services for a host of different industries. Pinnacle Tax primarily focuses on assisting small and mid-sized businesses in the greater LA area maintain tax compliance. He also has a specialty in assisting cannabis companies with rigorous tax compliance including Section 280E reporting requirements.

Earlier in his career, Hymers spent several years with Ernst & Young, where he worked in the firm's core assurance practice performing audits of public and private companies, specifically in the real estate industry. He was also a managing partner of multi-strategy hedge fund Dutchess Capital from 2019 to 2023, which provides micro-cap and mid-cap financing. In 2023, Hymers started Liqueous capital, a multi-strategy hedge fund designed to optimize value extraction and risk mitigation, ultimately benefiting issuers, shareholders and the firm's transaction partners.



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CATHY HYODO

Market Managing Principal, Los Angeles
Grant Thornton

As a skilled accountant with over 30 years of leadership experience, Cathy Hyodo has excelled in every role with which she's been entrusted at Grant Thornton. She currently leads her firm's Los Angeles office and has also overseen its Los Angeles Technology Industry Practice (TIP) as well as serving as a member of the firm's national TIP leadership team. In addition to overseeing hundreds of LA-based staff members, Hyodo supports clients in the manufacturing, digital media, e-commerce, telecommunications and technology service industries.

Hyodo has played a significant role in bringing Fortune 500 companies to the firm and growing Grant Thornton's technology sector practice. Furthermore, she created a SPAC alliance that brought ample new business to Grant Thornton and provided those clients with the in-depth knowledge they needed. She has also served on the Los Angeles chapter board of the California Association of Certified Public Accountants, the same organization that awarded her a 'Woman to Watch' award in 2010.



MALVE ILDEFONSO

Assurance Principal
BDO USA, P.C.

Malve Ildefonso, Assurance Principal for BDO Los Angeles' Asset Management practice, is one of California's top public accountants in alternative investing. She has built a reputation over 20 years for delivering audits of the highest quality and serving as a trusted business advisor for fund managers. She is also well regarded for her ability to develop her teams into top-quality practitioners.

Ildefonso's responsibilities at BDO include leading several audit engagement teams in serving clients across a broad spectrum of private companies, such as registered investment advisers, private equity funds, real estate funds, broker dealers and employee benefit plans. She has leveraged her technical expertise in fair value market-based measurements for clients, financial statement disclosures, SEC filings, financial reporting and more to target client growth opportunities for the larger LA assurance practice and BDO's management group. She was named the leader of BDO's Southern California Asset Management practice in 2023.



ALBERT JANG

Managing Partner
Kim & Lee, LLP

Since 1993, Albert Jang has been an influential leader in the Korean American business community. He has been leading Kim & Lee since 2005, transforming the firm for a digital environment to ensure its future sustainability, while also forging international relationships with Asian companies to expand its business reach. Jang is an expert on developing technology and adopted a cloud computing system in the early years before COVID, and is active in adopting AI into the practice with CAS business segments.

Jang has actively served in leadership roles and as a participant in several nonprofit organizations. He has served on the board for the Korean American Special Education Center, the Korean American Foundation and the Korean American Coalition. He also served as a president for Korean American Chamber of Commerce in 2023.



JOSEPH JOHNSON

Office Tax Managing Partner, Los Angeles Office
Deloitte

Joseph Johnson is the office tax managing partner for the Deloitte Los Angeles office. Johnson has over 26 years of experience supervising a broad base of client engagements across multiple offices. He has served clients in the financial services, real estate, manufacturing and hospitality sectors, and is a leader the local partnership sector.

Johnson has served a wide range of financial services clients, including investment advisors, hedge funds, private equity and venture capital funds, credit and debt funds, broker dealers and mutual funds. He spent 18 months at the Washington National Tax office, focusing on tax accounting issues, and was as a key resource for practice offices with complex accounting questions. He has published articles in Tax Analysts and teaches training sessions both internally and externally. He is also a member of the American Institute of Certified Public Accountants and the California Society of CPAs.



MARIJANE KANTZABEDIAN

Partner
Miller Kaplan

Marijane Kantzabedian is a key contributor to the high-performance culture at Miller Kaplan. With 15 years of experience, she has specialized in financial statement audits for the entertainment, media, and technology sectors, focusing primarily on private companies and exempt organizations. Kantzabedian's deep understanding of audit principles, combined with her ability to tailor services to each client's needs, has resulted in the establishment of many enduring client relationships.

Kantzabedian is also an active member of the Quality Control Committee. In this capacity, she ensures industry, state and federal audit regulation compliance by monitoring and reporting on policy updates, supporting both the firm and its clients in upholding high standards. Earlier this year Kantzabedian was appointed to the Accounting Principles and Assurance Services Committee, with which she works to keep CalCPA members informed of current accounting and reporting issues, and to serve as a leader in the profession for the state of California.



CHRISTY KASPER

Partner
gishSEIDEN

Christy Kasper joined gishSEIDEN LLP in 2017, bringing over a decade of tax and audit experience. Kasper plays a pivotal role in the firm, consistently delivering insightful financial strategies and ensuring fiscal health. She also has comprehensive experience in federal and multi-state tax compliance, tax planning and consulting for high-net-worth individuals, corporations, tiered partnerships, trusts and closely held businesses. Her innovative approach to financial management and problem-solving has not only streamlined processes but also enhanced overall efficiency.

Beyond her technical skills, Kasper's leadership in mentoring and developing junior accountants has significantly uplifted her team's performance. Her commitment to the profession is reflected by her active involvement in industry initiatives and contributions to advancing best practices. She teaches financial literacy, and is a member of the GISH Cares Committee, which collaborates with others in the community to support local causes and initiatives.

CONGRATULATIONS TO
LA OFFICE MANAGING PARTNER

Rick Schenkel

FOR BEING RECOGNIZED AS
ONE OF

**LABJ'S TOP 100
ACCOUNTANTS**



Formerly Sobul Primes & Schenkel, USXA is focused on delivering market-leading accounting and advisory services to its clients in Los Angeles and beyond. USXA offers tax, audit and assurance, business management/family office services, business valuation, and outsourced accounting to companies and high-net worth individuals.

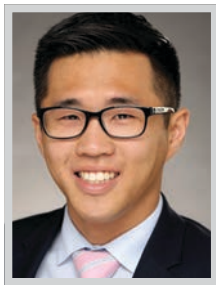
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JUSTIN KIM
Controller
Ocean Group Inc.

Within the first year of joining, Justin Kim has made a significant impact as the controller of Ocean Group, Inc., a private family-owned seafood wholesale and distribution company with branches across five states. Kim maintained a high level of productivity instantly and increasing efficiency and internal controls and providing a reliable foundation for robust financial planning and analysis (FP&A) and operations.

Kim is also an active member of the community with ongoing mentorship relationships to junior accountants within and outside the company.



JACQUELINE KING
Senior Accountant
The Springhill Company

Jacqueline King is a dedicated member of the accounting profession and has held jobs in several different industries and brought value to each of the companies she's worked with. She is currently supporting The Springhill Company's mission to positively impact the world through media. She has helped implement processes at these companies and bridge the divide between the creative teams and finance teams. The SpringHill Company unites three companies built by LeBron James and Maverick Carter: UNINTERRUPTED; SpringHill Entertainment; and The Robot Company, the brand and culture consultancy.

With a wide background of experience, King was previously senior corporate accountant at The Decurion Corporation, operations accountant at KARL STORZ Endoscopy-America, Inc., and held the position of leadership DELTA Cohort participant at GE, with a focus on leadership development. Her volunteer experience includes tax preparation assistance for low-income families through Impact Alabama.



TOM KLOCKNER
Partner
KPMG LLP

Tom Klockner is an audit partner in the Life Sciences and Consumer and Industrial Markets practices at KPMG Los Angeles. He has more than 20 years of experience providing financial statement audits and internal control service audits, adhering to public and private company standards and both US GAAP and IFRS.

Klockner's professional experience includes leading the audits of multiple initial public offerings and SPAC transactions. He plays a significant role in expanding audit innovation at KPMG, having held various audit technology positions, including his current role as the business unit technology partner sponsor for the Pacific Southwest. Additionally, he supports KPMG's diversity and inclusion initiatives by serving as the partner sponsor for the Los Angeles Pride@KPMG Chapter. He serves as a mentor and performance manager to various prospective accounting professionals, from current university students and interns to senior managers.



RAFFI KURKJIAN
President
RGK Accountancy, P.C.

A leader in his industry, Raffi Kurkjian gives hours of his time every week to help others. He has over 10 years of professional experience in public accounting with two large accounting firms listed among the top 100 CPA firms in the nation as well as small boutique CPA firm. He has worked primarily with labor unions, auditing and preparing their financial statements as well as preparing and filing the Federal & State returns and DOL Form LM-2. He specializes in Employee Benefit Plan (ERISA) audits such as pension plans, health & welfare plans and 401(k) plans.

Kurkjian has also serviced small businesses and non-profits with audits and business management. He brings the experience of large accounting firms as well as the service and responsiveness of a small boutique firm. He is on the board of directors of the California Society of CPA (CalCPA) Los Angeles Chapter.



DEREK LEE
Senior Manager, Tax Department
SingerLewak

Derek Lee is a senior manager at SingerLewak LLP, specializing in catering to high-net-worth clients and those operating within the real estate sector. Lee's professional portfolio reflects his adeptness in advising clients and executing real estate tax-deferral strategies, resulting in substantial multi-million-dollar tax savings. His role also extends to mentoring staff and contributing significantly to the development of the firm's real estate knowledge base.

Additionally, Lee has actively contributed to various organizations such as Child's Hunger Fund, both as a generous donor and a dedicated volunteer, along with his family.



BETTY LIU
Director
CBIZ

Betty Liu, CPA, brings over two decades in the industry of experience and leadership to her role as director at CBIZ & MHM, a national accounting and financial services provider. Since her promotion to director in January 2022, Liu has spearheaded initiatives that have redefined the tax department's approach, injecting fresh perspectives and innovative strategies into their operations. Her expertise spans various sectors, including real estate, manufacturing and retail, where she has consistently delivered exceptional results by navigating complex tax landscapes and providing strategic guidance to her clients.

Liu actively seeks opportunities to mentor and develop her team members, recognizing that their growth is integral to the success of the entire department. In recognition of her exceptional contributions, she had won the LABJ Women of Influence - Accounting award in 2021, 2022, and 2023, and the LABJ Women's Leadership Awards - Mentor of the Year in 2024.

2024 HONOREES



GAURAV MALHOTRA

Assurance and Audit Partner
Lucas, Horsfall, Murphy & Pindroh, LLP

Since joining the Lucas Horsfall in 1999, Gaurav Malhotra has been a cornerstone in establishing and growing the firm’s audit and client accounting services practices. His role has also been pivotal in developing the firm’s M&A practice. Malhotra’s client-centric philosophy enhances the firm’s service delivery quality and efficiency and drives meaningful results for those he serves. Beyond his technical expertise, he fosters a work environment where team members feel deeply connected to their purpose, which cultivates a culture of engagement and excellence.

In his current role as an independent director of the American Business Bank, Malhotra brings valuable insights and leadership that benefit both the financial sector and the wider community. Beyond this, he has become a mentor to young adults through internship programs, sharing his knowledge and experience to help guide the next generation of professionals.

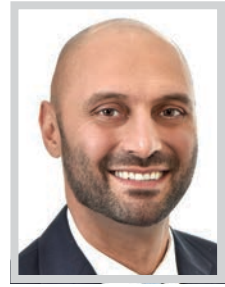


SEAN McFERSON

Managing Partner
Windes

Throughout Sean McFerson’s career and his journey at Windes, he has demonstrated exceptional competence and dedication in the field of taxation. As the firm’s managing partner, McFerson serves on the Board of Directors and has consistently delivered insightful solutions and strategic guidance to clients and colleagues alike. Prior to being elected managing partner in 2024, he headed the firm’s International Tax practice.

With over 25 years of experience, McFerson has cultivated a deep understanding of both domestic and international taxation. His specialization covers an impressive spectrum, including consulting on income tax provisions, facilitating mergers and acquisitions, and providing expertise in US inbound and outbound tax planning. McFerson’s influence reaches across industries, from technology to manufacturing, distribution, and more. His expertise has been instrumental in assisting high-net-worth individuals and a diverse array of clients in navigating complex tax landscapes with confidence.



MICHAEL MEHANNA

Partner
KPMG LLP

Michael Mehanna is a partner in KPMG’s Credits, Grants, and Incentives (CGI) Group, with a specialization in tax accounting methods and tax credits. For the past 18 years, Mehanna has consulted and conducted studies on various business tax credits, incentives and methods such as the Research and Development Tax Credit (IRC Section 41), IRC Section 174, Inflation Reduction Act Credits (e.g., IRC 48, 45X, 48C, etc.), IRC 48D (CHIPS), Employee Retention Credit (CARES Act Section 2301), and more.

Mehanna has experience in all stages of tax, accounting and credit projects, from the assessment stage to the IRS audit defense stage (including both at the Examination and Appeal levels). He has provided services to clients across various industries, including power & utilities (renewables), automotive, computer software, pharmaceuticals, medical devices and manufacturing. Additionally, he serves as an executive committee board member for the Boys and Girls Club of Metro Los Angeles.



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Citrin Cooperman
Congratulates **Jan Goren** and
Victoria Moss for Being Named
on *Los Angeles Business Journal's*
"Top 100 Accountants"



Jan Goren
Partner



Victoria Moss
Partner

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MICHAEL MILAM
Financial Advisor
Milam, Knecht & Warner

Mike Milam began his career with the international CPA firm of Ernst & Young. Before founding Milam, Knecht & Warner, he worked as a chief financial officer and senior vice president for a large real estate development, business management, and venture capital firm.

In addition to providing portfolio management to high-net-worth clients, Milam brings a unique perspective to the financial planning and wealth management process. His experience as a certified public accountant is vast and includes business management, finance, taxation, estate planning and consulting. Milam provides his clients with a comprehensive approach to all aspects of financial planning. With his unique experience, he has spoken nationally on tax planning techniques and the planning process. In addition, he has testified as an expert witness in the Los Angeles Superior Court system on income, estate and trust taxation, accounting and finance.



ANDY MINTZER
Principal
Hemming Morse, LLC

Andrew Mintzer is a principal in the Forensic and Financial Consulting Services Group at Hemming Morse in Los Angeles, with over 40 years of experience as a Certified Public Accountant (CPA). He spent 17 years at Ernst & Young, auditing public and privately held companies and providing forensic accounting services. Mintzer has worked in and contributed to several industries, including financial services, real estate, consumer products, entertainment and manufacturing. His litigation service experience includes matters involving accounting principles, auditing issues and fraud investigations.

Mintzer has been appointed to the International Ethics Standards Board for Accountants (IESBA) since 2019 and has served on three professional standard-setting bodies of the American Institute of Certified Public Accountants (AICPA). In 2021 he was elected to a three-year term on the board of directors of the Association of International Certified Professional Accountants.



SHASHI MIRPURI
Principal
Baker Tilly

After graduating California State University Northridge, Shashi Mirpuri went straight to work for top accounting firm Arthur Anderson. Mirpuri spent most of his career at regional and national firms, which helped him develop a well-rounded skill set. His experience includes multistate and multinational operations, federal and state tax return compliance, tax outsourcing projects, and tax research and analysis. Over the years, his role has evolved, and he is now mentoring and developing the younger generation of accountants.

Mirpuri specializes in individual and corporate taxation, with a primary focus in Accounting for Income Taxes (ASC 740) for both public and private companies. He works with clients in various industries, including technology, retail, franchise, manufacturing and distribution and apparel. In addition to managing tax engagements, he serves as the Los Angeles office tax practice leader for Baker Tilly.



VICTORIA MOSS
Partner
Citrin Cooperman Advisors LLC

With over 30 years of experience, Victoria Moss has become a cornerstone in her firm's Woodland Hills, CA office, where she serves as a tax partner. Moss's expertise spans a diverse range of industries including real estate, entertainment and media, and professional services. She provides top-tier income tax compliance and consulting services to private equity and portfolio asset companies, leveraging her deep understanding of the intricate tax landscapes. Her work with asset management clients, particularly multinational private equity clients, showcases her ability to navigate complex tax provisions across energy, consumer products and real estate funds.

Additionally, Moss's proficiency extends to high-net-worth individuals, offering them invaluable advisory services on international and multistate tax provisions. Her previous role as a tax managing director at a large public accounting firm in Los Angeles underscores her leadership and dedication to the profession. She actively engages in mentorship programs, guiding the next generation of accountants and financial professionals.



CHIKARA "RICKY" NAGANO
Managing Partner, Torrance Office
Prager Metis

Ricky Nagano is a Partner in the Accounting and Tax Attest Department at Prager Metis. He is also the leader of the firm's Japanese Global Services Group. In this role, Nagano offers financial and business strategy consultancy to Japanese companies working in or looking to develop operations in the US and domestic companies interested in expanding their businesses into Japan.

Born and raised both in Japan and the US, Nagano specializes in providing accounting, audit, tax and consulting services to Japanese-speaking clients in a wide range of industries, including entrepreneurs, individual clients and information technology companies. Nagano is also deeply committed to community service. He serves as treasurer of the nonprofit Support-of-People-in-Need, which supports poverty-stricken families and communities in his local area. He also contributes to the Japanese Business Association of Southern California, striving to enhance the business environment for Japanese companies in the region.



LILIT NERSISYAN
Audit Principal
Withum

Lilit Nersisyan is a principal in Withum's Los Angeles office with over 12 years of experience working with clients in the financial services industry. She specializes in financial reporting, GAAP, GAAS and Alternative Investment Audits. In her current role, she supported the expansion of the firm's Financial Services niche when it launched on the West Coast. She has built up the national practice by connecting East and West Coast teams, expanding regional clientele and training new hires.

Nersisyan worked to create a streamlined audit process and design effective internal control processes for team members to follow. She also serves as a leader and brand ambassador for Withum's Women in Financial Services empowerment group, which brings together female business leaders and young women through networking events, women-focused roundtables, seminars and happy hours to empower and promote women across the financial services industry.

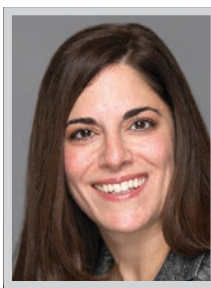
2024 HONOREES



JEFF NEUMEISTER
Managing Partner
 Kelly+Partners Burbank

Jeff Neumeister is a distinguished forensic expert and consultant specializing in accounting, cryptocurrency and financial advisory services. As the managing partner at Kelly + Partners Burbank, he has built a reputation for excellence in addressing complex financial challenges for small organizations, startups, holding entities, high-net-worth individuals and middle-market companies. With over 24 years of experience, five graduate degrees, and multiple professional certifications, Neumeister has been instrumental in identifying issues, uncovering fraud, facilitating successful exits and driving sustainable growth for his clients.

Neumeister is a sought-after speaker, frequently sharing his insights at conferences, webinars and events. He also contributes to academia as a professor in both undergraduate and graduate programs, shaping the next generation of financial professionals. Designated as an expert in numerous legal cases, he has provided invaluable deposition testimony and litigation advisory services.



KELLY O'NEIL
Lead Managing Director
 CBIZ

Kelly O'Neil, CPA, stands as a beacon of leadership and expertise in the accounting field. As lead managing director at CBIZ MHM, LLC, and shareholder at Mayer Hoffman McCann P.C. (MHM), she brings over 25 years of experience. Serving as leader of private equity for the West Coast, O'Neil's focus is in providing high-quality audit and attest services to companies across various industries, with an emphasis on those backed by private equity and venture capital firms. She specializes in revenue recognition, purchase accounting, accounting for stock-based compensation, equity and debt instruments, and derivatives accounting.

O'Neil is a member of the California Society of CPAs, the American Institute of CPAs, and the Association for Corporate Growth. She is an executive board member of CBIZ Women's Advantage (CWA) within the company's offices, where she directs the development of its female professionals through focused leadership, mentoring and networking.



WENDY ON
Co-Managing Partner
 Fineman West & Co LLP

Wendy On took over as co-managing partner of Fineman West & Co LLP during the pandemic in 2021. Her leadership has been crucial in guiding the firm through challenging times and she has done so with a focus on inclusivity, community engagement and staff development. On has over 20 years of experience serving clients in the consumer products, real estate, manufacturing, biotech, technology and entertainment industries. From inbound and outbound logistics to manufacturing and import/export processes, she provides business and tax planning strategies and share best practices in the industry to help companies achieve their financial goals.

On serves on the California Hospital board in Los Angeles and the Asian Pacific Community Fund, where her expertise in financial management has been instrumental. She is fluent in Mandarin and Cantonese Chinese and leads the firm's Chinese practice group.



Congratulations Keith

on being nominated as a Top 100 Accountant for the third year in a row.



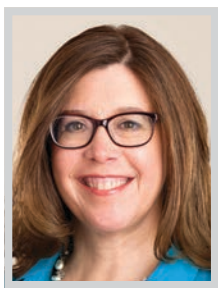
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Keith Hamasaki
 Partner - EisnerAmper



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RENEE ORDENEUX

Partner
Armanino LLP

Renee Ordeneaux stands out as a leading figure in nonprofit financial management, with over 25 years of experience in public accounting and industry. With an expertise in the nonprofit sector, Ordeneaux specializes in working with complex and growing organizations, such as nonprofit housing providers. She helps her client identify opportunities to enhance processes and systems in response to changing needs and increased challenges. Her dual experience in the private sector and public accounting uniquely positions her to lead financial audits with a deep understanding of the challenges and opportunities within nonprofit organizations.

Ordeneaux serves on the finance committee of the Theodore Payne Foundation and the board of Upward Bound House. She is an influential educator, contributing to the accounting community by providing specialized training in nonprofit financial reporting and auditing via CalCPA, and has taught nonprofit accounting at UCLA Extension.



CHARLES OSAKI

Adjunct Faculty
Cerritos College

Charles Osaki is an adjunct faculty member at Cerritos College in, where he has taught accounting since 2019. For most of his career, Osaki has been in senior management with leadership responsibilities in human resources, including recruiting & staffing, orientation, performance management, compliance and risk management, employee relations, compensation and cultivator values. He has been responsible for developing strategies, implementation plans, processes, policies & procedures for each of these human resources functions.

Osaki has been a member of CalCPA for 22 years, under which he has held many positions including chair for the Accounting Education State Committee, and serving on the Board of Trustees, Council, and Nominations Committee. He is currently a member of the Diversity, Equity & Inclusion Commission. Osaki also founded the Pathway to Success Program at Cerritos College in 2020, which supports first-generation and underrepresented college students pursuing professional careers in accounting.



YELENA PAPIRYAN

Tax Partner
Duffy Kruspodin, LLP

Yelena Papiryan graduated from the National Research University of Electronic Technology in Moscow and immigrated to the United States in 2000. She joined Duffy Kruspodin (DK) in 2005, became licensed as a CPA in 2006 and was promoted to partner in 2020. She services a diverse group of clients in industries including restaurants, franchises, real estate, professional services and manufacturing. She works with small to mid-size businesses and high-net-worth individuals, providing them with her expertise in accounting and business management, domestic and international tax reporting, compliance, and business consulting.

Papiryan leads the firm's International Tax Specialization team, and actively participates in many of the firm's acquisitions, while helping transition clients from seller partners. She worked to create, develop and expand the firm's CAS (Client Advisory Services) department. She also provides committed mentorship to tax staff through counseling, training and encouragement.



DAVID PAPOTTA

Partner
Perry Hay, LLP

David Papotta has served as partner and principal for many years with large local public accounting firms with as much as 35 staff members providing audit, tax and consulting services to private and public businesses, NPOs, and high-net worth individuals. In total, he has over 25 years of service experience in the accounting profession.

Papotta has expertise in several areas, including business management—providing fractional CFO and controller services for businesses and administration of high-net-worth individuals' estates. He also specializes in forensic accounting—encompassing fraud investigations and due diligence services—as well as tax return preparation, and attest engagements, which encompass audits of private businesses, nonprofit organizations and 401(k) plans. Additionally, he served as corporate controller for an employee-owned S-Corporation with \$57 million of annual revenues generated from engineering services provided in 10 offices nationwide, \$34 million of total assets, and approximately 350 employees.



SONIA PARIKH

Senior Manager, Risk Consulting
Ernst & Young LLP (EY US)

Part of the EY Risk Consulting practice, Sonia Parikh has over 13 years of experience and a wide scope of knowledge in risk, compliance and operational consulting services. Her skill set spans technology, digital media, entertainment, ecommerce and consumer products. She recently served as the digital advertising revenue business process subject matter resource on a controls design project for an online event management platform.

During her time at EY, Parikh has fostered and maintained strong relationships with her clients, which include well known media and entertainment companies. Parikh was the leader for the LA office for EY Ripples, the global corporate responsibility program aligned to drive progress toward the UN Sustainable Development Goals by positively impacting one billion lives by 2030. She curated year-round skills-based EY Ripples programming, which engaged the office to positively impact the local community.



MARK PARISER

CPA / Partner
Dunn, Pariser, Peyrot

Mark Pariser's long history of reliable financial service has made him a go-to for clientele in and around Hollywood, from actors and directors to international executives and entrepreneurs. As leader of Dunn, Pariser & Peyrot's financial team, Pariser oversees his clients' affairs by providing budgeting and cash flow planning as well as incorporating insurance review, estate, and tax planning into his management activities. He serves an extensive and diverse clientele from athletes, musicians, acts and design teams, to touring acts, international executives and entrepreneurs.

Pariser joined the SONA (Songwriters of North America) board of directors in July 2020. In addition, he serves on the board of directors for the SONA Foundation. He also works closely with Manifest Works, an organization dedicated to workforce development and job placement for those affected by foster care, homelessness and incarceration.

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MARIA PEARMAN
Partner
GHJ

Maria Pearman, CPA, CGMA, is the food and beverage practice leader at GHJ, where she combines her passion for accounting with her expertise in the food and beverage industry. Pearman has made significant contributions to her field and stands out as a leader in the growing client accounting services space. She provides specialized accounting services to clients in the food and beverage sector, helping them navigate complex financial landscapes and achieve business success.

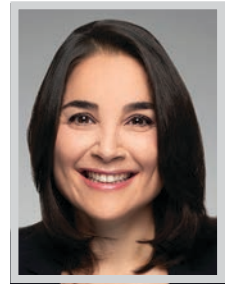
Prior to joining GHJ, Pearman founded her own accounting firm, offering outsourced accounting services specifically tailored to the beverage alcohol industry. She has also written two books, *Small Brewery Finance* and *Distillery Finance*, which serve as essential guides for entrepreneurs looking to run successful beverage businesses. She teaches at industry conferences, webinars and educational programs, sharing her expertise with the next generation of food and beverage entrepreneurs.



JILLIAN PHAN
Partner
Meloni Hribal Tratner LLP

As Meloni Hribal Tratner's first female partner, Jillian Phan directs the firm's assurance practice and has over 25 years of experience in auditing, taxation and accounting. Her related areas of expertise include financial statement audits and reviews as well as other accounting related projects for clients in the foodservice, manufacturing, wholesale, distribution, franchise, real estate, entertainment and gaming industries.

Phan performs employee benefit plan audits, plans and coordinates corporate acquisitions, mergers, and spinoffs, provides tax planning and compliance for individuals, partnerships, and corporations, and represents clients during audits by governmental agencies. She currently serves on the state board of CalCPA as secretary/treasurer and served as chapter president of the CalCPA Los Angeles chapter, for which she is a mentor in its annual Summer Leadership Program which serves students who are looking to be in the accounting profession.



KARINE PHILIPPON
Managing Partner, California & Arizona Assurance
FORVIS Mazars

Karine Philippon serves as the managing partner of Mazars Los Angeles office. She started her career in the Mazars Paris office and has more than 15 years of experience in public accounting, with a focus on assisting clients with business acquisitions and audits. Philippon also leads the Technology & Media Practice globally and is a member of the firm's Executive Board.

Philippon built the Los Angeles FORVIS Mazars office, and ran and grew the technology practice for the company in the US and globally. She is member of the French Trade Advisors - CCEF Southwest Section. With a focus on assisting clients with business acquisitions and audits of middle-market to multinational publicly-traded corporations under IFRS, US GAAP and French GAAP, she has an extensive background serving manufacturing and technology companies as well as service organizations.

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Congratulations Chester Ventura, CPA, Partner and Lilit Nersisyan, CPA, Principal, 2024 Los Angeles Business Journal Top 100 Accountant honorees.



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JOSEPH RUST

Chief Strategic Innovation Officer
Prager Metis

Joseph Rust is the chief strategic innovation officer and managing partner for the Western Region at Prager Metis. He has been practicing accounting for over 35 years. As CSIO, Rust oversees and advises on all aspects of strategic focus, direction, and execution and encourages a culture of innovation. He works closely with the firm's team to implement new solutions to provide high-value service to its clients and support its growing team.

Rust's expertise is in several areas of the entertainment industry working on behalf of recording artists, songwriters, music publishers, entertainers and executives. His specialties include royalty and profit participation examinations, copyright and intellectual property valuations, financial due diligence, licensing examinations and business management. By leveraging decades of industry experience alongside the capabilities of new technology, Rust and his team have created a unique process of recovering royalties and providing highly beneficial services to clients.



JACKIE SAWIRIS

Tax Partner
Duffy Kruspodin, LLP

Jackie Sawiris has overcome tremendous obstacles and demonstrated incredible resilience on her path to becoming a partner at Duffy Kruspodin (DK). After 13 years working in a pharmacy, Sawiris decided to pursue her accounting career full-time. She started off as a bookkeeper and moved her way up to tax. While working full-time, and caring for her son, she continued to attend school full-time and eventually graduated with a bachelors, masters and MBA.

In 2013, Sawiris started working at DK as a tax supervisor, became an enrolled agent in 2015 and recently celebrated her 11th anniversary at the firm. She serves on the Family Office, International Tax and High Net Worth Individuals practice groups. She drives the firm's industry practice groups and is a co-leader of its Professional Service Group. She also has extensive experience in arts, sports & entertainment, healthcare, real estate and retail.

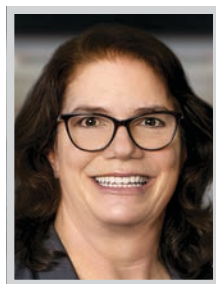


RICK SCHENKEL

Managing Partner, Los Angeles Office
USXA

Rick Schenkel is the partner primarily responsible for the USXA's Business Management, Entertainment Industry, and Personal Financial Planning Departments. Schenkel began his accounting career in 1978 and most recently served as a managing shareholder of Sobul, Primes & Schenkel—which he cofounded, before joining USXA. He graduated from California State University, Northridge.

Schenkel has led the firm that began with six accountants to a firm of close to 50, that is now part of a much larger and rapidly growing organization. He created the firm's business management, family office outsourcing, and accounting outsourcing service areas. These service areas comprise roughly half of the LA office revenue. He is also responsible for developing the entertainment industry practice for the firm, a key part of the other half of the office revenue. Additionally, he has actively been involved in the Water Buffalo Club charity organization.



CINDY SCHOELEN

Partner, Advisory
BPM LLP

Cindy Schoelen, Partner at BPM LLP, is a transformative leader who has shaped the accounting profession in Southern California for over three decades. Her journey spans from IRS agent to founder of her own entrepreneurial firm, ultimately leading to her role as a partner at BPM. She has been a driving force in navigating her team through the significant transition of merging with BPM in 2023.

As a pioneer for women in accounting, Schoelen overcame systemic barriers in the 1980s to build a thriving practice. She leveraged her unique background in tax, audit and advisory services to become a trusted advisor to a diverse client base, including many long-term relationships spanning over 20 years. Additionally, she has mentored dozens of young accountants, with a focus on empowering women and underrepresented professionals to advance in the field.



ROBERT SELTZER

President
Seltzer Business Management, Inc.

Robert Seltzer has been a pioneer in the accounting and financial industry. He has been serving high net worth clients for over 31 years with their business decisions and tax preparations. Besides serving his clients' accounting and financial needs, Seltzer contributes to the profession by contribution to different publications. He is a contributing author for "Tips from the Top-Targeted Advice from America's Top Money Minds" to being interviewed by high profile news and business publications, trade publications and broadcast outlets. He is a member of CalCPA, AICPA and the PFP Committee of CalCPA. He serves the CalCPA LA Chapter as Chapter president and he has been on the Board of Directors for several years.

Seltzer gives back to the community in several ways. For example, he is a member of the legislative outreach committee of CalCPA's financial literacy campaign and current LA Chapter chair.



LEWIS SHARPSTONE

Founder
Lewis Sharpstone & Co.

Lewis Sharpstone has successfully conducted over 1,500 nonprofit audits and served over 225 nonprofit organizations, large and small and in all sectors of the nonprofit community as their CPA. Prior to founding his firm, he spent two and a half years with a national firm leading its nonprofit practice in the West Region, 27 years with a regional firm where he founded and lead the nonprofit practice and seven years with a big 4 accounting firm.

Sharpstone was the CalCPA chair from 2018-2019 and has played a large role within the Society and has served on several committees within CalCPA such as Non-Profit and Nominations and has been a member of State Council to represent the profession in Sacramento. Additionally, he has been active in the community serving on nonprofit boards and is currently serving on the board of the Entertainment Industry Foundation.

2024 HONOREES



TROY SHEEN

Partner
PwC LLP

Troy Sheen has over 20 years of assurance experience, predominantly in the retail and consumer, industrial manufacturing and technology sectors. Sheen has significant experience in leading audits ranging from smaller privately held clients to large, multi-national audit clients. He assists his clients with a range complex business issues, including business combinations, business divestitures, restructuring, debt financing, accounting for income taxes, stock-based compensation and revenue recognition. He has led teams in providing client service on various non-standard transactions, including IPO transactions, debt offerings (both SEC and private placement), carve-out audits, comfort letters, business combinations and significant dispositions.

Sheen has also served in various firm leadership roles, including serving as the audit practice leader for Consumer Markets and Industrial Products and Services in Los Angeles, and is currently in PwC's Chief Auditor Network.



LIEL SHEMTOV

Partner
Miller Kaplan

Liel Shemtov has swiftly advanced in his career, rising from a first-year staff auditor to partner in under 10 years. Since achieving this milestone, Shemtov has delivered exceptional financial statement audit services across employee benefit plans, labor organizations and the hospitality industry. Before joining Miller Kaplan, he gained valuable experience as an accountant for small family businesses and as a project manager for a construction company.

Shemtov excels in guiding clients through complex audit processes and addressing critical issues, such as helping hospitality clients retain their business licenses. His impactful leadership has empowered both clients and colleagues to make informed decisions amidst the ever-changing landscape of the industry. He actively contributes to the firm's DEI Committee, Pathway to Partnership Committee, and Training Committee, reflecting his dedication to fostering an inclusive and supportive professional environment.



JING SHEN

Senior Manager
CBIZ

Senior Manager with CBIZ, Jing Shen has 20 years of experience providing tax services to her clients in a variety of industries, including manufacturing, real estate, wholesale distribution, fixed income portfolios management, professional services and entertainment. Shen assists her clients with complex tax matters, including tax compliance, planning and consulting services to business partnerships, C corporations and S corporations as well as high net worth individuals.

Shen participates in CBIZ's Women Founders Network (WFN) events and has presented to WFN during the Female Founders Workshop on the topic of pitching, fund raising and survival, which provided legal, IP and financial advice to female founders of early-stage startups. She is also fluent in Mandarin Chinese, participates in many Asian-American networking events where she educates investors and immigrants about US tax laws, helping them thrive in the United States.

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People who are moving the world forward are the kind of people who build our success at EY. We're pleased to congratulate Vishal Gupta, Ahsan Ahmed and Sonia Parikh for being recognized as Los Angeles Business Journal Top 100 Accountants. It's an achievement that helps drive us all forward.

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Vishal Gupta
Partner
Assurance - Health Care Services
Ernst & Young LLP



Ahsan Ahmed
Partner
Strategy & Transactions
Ernst & Young LLP



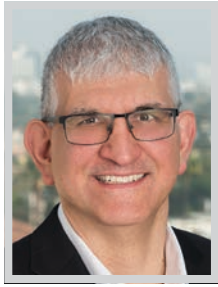
Sonia Parikh
Senior Manager
Risk Consulting
Ernst & Young LLP



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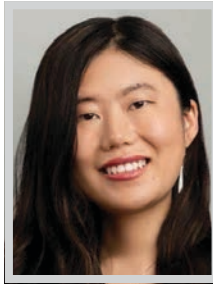


MARK SILAH

Partner
NKSFB, LLC

Mark Silah is a senior tax partner at NKSFB. He has been with the firm for over 26 years, serves on its Executive Committee and is part of the leadership team in the Private Client Tax group. Silah has played a significant role in the NKSFB's growth from a 175-person firm with a single Los Angeles office one with over 650 employees and multiple offices across the country.

Silah serves his clients as a trusted advisor, and focuses on comprehensive income tax planning, multi-generational wealth transfer planning, philanthropy planning, single-family office advisory and tax controversy representation. He is also a certified financial planner (CFP), trust and estate practitioner (TEP), AICPA personal financial specialist (PFS), and has a master's degree in business taxation (MBT). He has spoken at various conferences, universities and events on topics including income tax, trust and wealth transfer planning and family office advisory.

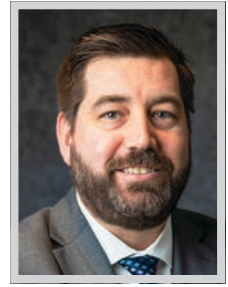


TING SONG

Director
First Republic (Acquired by JP Morgan Chase)

Ting Song is a director at First Republic Investment Management, a company that has recently been acquired by JP Morgan Chase. He leads and supervises the Alternative Investment accounting department at the Eagle Alternative Investments platform and oversees accounting operations for Private Equity Funds and Hedge Funds with 3.2 billion assets under management. During his tenure at First Republic, he has implemented projects and innovations that introduced technology to the existing manual platform, leading to a significant cost reduction and growth of the platform.

Song also has extensive experience in accounting and consulting for non-profit organizations. He successfully assisted big name nonprofits in establishing accounting systems from the ground up, enhancing efficiencies in their accounting processes, resolving complex accounting issues, providing oversight for financial reporting, and offering valuable finance strategy consultation.

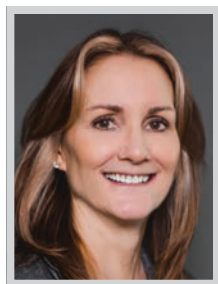


MATTHEW SPRAGUE

Audit Partner
Hedman Partners LLP

As an audit partner at Hedman Partners LLP, Matthew Sprague is responsible for providing hands-on, high-quality attest services to his clients. In addition, he provides valuable business and industry insights based on his nearly 20 years of experience. Sprague is heavily involved in the firm's recruiting and retention initiatives, and also mentors the firm's manager and senior associates. He recently co-lead a CalCPA LA Chapter presentation to a select group of directors and senior managers from firms across southern California on navigating the path to partner.

Sprague is also heavily involved in the firm's investment banking affiliate, Hedman M&A Advisors (HM&AA). As a director in this practice and a certified mergers & acquisition advisor through the Alliance of Mergers & Acquisitions Advisors, he works closely with business owners to help them secure their financial future through the sale of their business.



LESLIE STACKPOLE

Los Angeles Office Leader
RSM US LLP

Leslie Stackpole leads at RSM US LLP (RSM) by combining exceptional technical expertise with a deep commitment to professional development and community service. As the Los Angeles Office Leader and partner at RSM, Stackpole has over 25 years of experience, including 12 years with Big Four accounting firms, in providing tax compliance and consulting services to clients in various industries, including technology, healthcare, manufacturing and distribution, and real estate and construction. At RSM, she and her team serve as first choice advisors to middle market clients, leveraging their unique culture to drive success.

Stackpole plays an impactful role with Junior Achievement of Southern California, and engages in volunteer activities with various charitable organizations supported by the office. She is also an executive sponsor of RSM's employee network group STAR (Stewardship. Teamwork. Advancement. Retention.), which advocates for women in the workplace



ALEX STURM

Managing Shareholder; Chairman
Cohn Handler Sturm | An Accountancy Corporation

With over 22 years of experience in public accounting, Alex Sturm cultivated a diverse and extensive client base through his deep understanding of the accounting field and his innovative strategies. He is chairman and managing shareholder at Cohn Handler Sturm, and serves as a tax director, spearheading the firm's business development and marketing strategy. He has also allowed for market share growth in industries such as real estate, professional services and social media influencers.

Sturm's role transcends the traditional boundaries of public accounting. He has been instrumental in developing and implementing advanced accounting practices that have improved efficiency within the firm and provided immense value to its clients. He is a former president and four-year board member of The Professionals Club (TPC) and was a founding member of the Young Professionals division of the Commercial Finance Conference of California (CFCC).



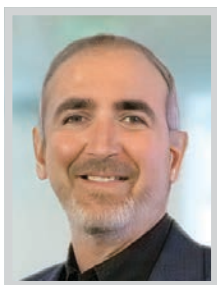
CAROL SURUKI-CARMANY

Partner; Partner in Charge, Los Angeles Locations
Moss Adams

Carol Suruki-Carmany has practiced public accounting since 1991. She has significant experience in accounting, auditing, general business and management consulting, and serving multigenerational family-owned and private equity-managed manufacturers, distributors, and other consumer product companies. Suruki-Carmany provides assurance services to middle-market clients that sell products to retail and distribution channels including mass, club, grocery, e-commerce, restaurants, spas and hotels. Her clients include companies with worldwide international subsidiaries.

Suruki-Carmany served on the board of the California Society of Certified Public Accountants from 2011 through 2013. In 2010, she was honored with the organization's prestigious Women to Watch Experienced Leader award. She is also a champion for students at CSUN Nazarian College of Business and Economics, helping provide student support so students can focus on their studies. She is a member of the American Institute of Certified Public Accountants and the Fresh Produce and Floral Council.

2024 HONOREES



NORM TAMKIN
Partner
HCVT

Norm Tamkin leads the HCVT Encino office tax practice and has over 33 years of experience addressing the tax needs of his clients, including complex planning issues and estate and trust planning in conjunction with estate attorneys. Tamkin’s clients include high-net-worth individuals, closely held businesses and flow-through entities.

Tamkin’s industry experience includes real estate syndication, ownership and development. He has extensive subject matter specialization in partnership taxation addressing allocations, capital maintenance, and other matters. In addition to serving clients in the real estate industry, he serves professional service businesses in the medical, legal, investment and banking professions. He has successfully represented his clients in providing tax controversy assistance during IRS and FTB audits. Tamkin was also on the CSUN founding advisory board that developed the Master of Science in Taxation program.



KEN TEASDALE
Partner
Armanino LLP

Ken Teasdale has been a visionary leader in the accounting profession and at Armanino for decades. As the leader of both the Foundations and Grant-makers in the Nonprofit Industry Group and the Southern California Manufacturing & Distribution Industry Group, Teasdale has consistently demonstrated his commitment to excellence and innovation. His forward-thinking approach has been instrumental in helping Foundation clients implement automated and AI-based processes, significantly reducing manual tasks and enhancing operational efficiency.

Beyond his technical expertise, Teasdale is a dedicated mentor, guiding numerous associates within the firm to become future leaders and innovators in the industry. He is also a current board member and chairman of the Audit Committee for the Child and Family Guidance Center in the San Fernando and Antelope Valley, and plays a crucial role in ensuring the organization’s financial health and accountability.



TODD VAN DER WEL
Partner
Moss Adams

Todd Van der Wel’s career, spanning over three decades with Moss Adams, is a testament to his dedication to the field of public accounting and his ability to lead with a vision. Since joining the firm in 1988, Van der Wel has consistently delivered superior client service and fostered a culture of trust. As a homegrown partner, provides business assurance and consulting services to a diverse range of clients, including public, institutionally held and closely held companies with multinational and multistate operations. As the leader of the firm’s Manufacturing and Consumer Products Industry Group, he achieved an impressive 10% year-over-year revenue growth.

Van der Wel has also played a pivotal role in the firm’s governance and strategic direction. As a partner in charge of the Los Angeles and Woodland Hills offices for 12 years, he has been instrumental in shaping the firm’s public company practice.



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716.218.3482

Denver Office
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Greenwood Village, CO 80112
720.551.4964



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CHESTER VENTURA
Partner
Withum

Chester Ventura is a thought leader, business advisor and mentor at Withum. A licensed certified accountant since 2010, Ventura completed his education at Cal State University, Northridge. With over 20 years of experience, he provides attestation services for privately held companies in various sectors and industries, including manufacturing, distribution, service, not-for-profit and employee benefit plans.

After joining Martini Partners in 2012, Ventura was quickly recognized as an integral audit and assurance team member and became a partner in 2020. In 2022, Martini Partners merged with Withum, and Ventura became the audit and assurance practice leader for the Los Angeles office in 2023. He has established himself as an invaluable member of the business community, and is an active member of ProVisors, a networking association for professionals, and a board member for Search to Involve Pilipino Americans (SIPA).



JUN WANG
Partner
Miller Kaplan

Jun Wang brings over a decade of experience in public accounting, with a specialized focus on corporate tax, including C-corporations, S-corporations, fiduciary (trust) tax, and partnerships. With over 12 years of practice, Wang excels in tax planning, preparation and advisory services for high-profile and high-net-worth clients across various industries, including entertainment, real estate, retail and manufacturing. She is adept at navigating complex tax situations and optimizes her client's financial outcomes by fostering a collaborative relationship built on trust, integrity and personalized attention with each client.

Beyond her professional work, Wang is committed to tax education and community service. She leads educational discussions and volunteers at Calvary Chapel Chinese Fellowship & Presence. Additionally, she regularly contributes to Presence Quotient, a nonprofit dedicated to bridging cultural and generational gaps to foster healthy families and multicultural communities.



LINLIN WANG
Director
PwC LLP

Linlin Wang has completed her rotation abroad by working in PwC's Tokyo office for more than two years, and returning to Los Angeles in October 2023. Wang has consistently exhibited her leadership in serving the firm's key Asset & Wealth Management (AWM) clients. In Tokyo, she was viewed as a role model by many of the Tokyo staff.

She has actively participated in volunteering opportunities, including UCI's Center for Investment and Wealth Management (CIWM).

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Managing Partner - Torrance Office



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CRAIG WICKWIRE

Partner, Tax Services, Private Equity
RSM US LLP

With 25 years of experience in public accounting, Craig Wickwire has made significant contributions to the tax practice, particularly in the private client and alternative investment sectors. As a tax partner, he leads the RSM US LLP (RSM) West region private client tax practice, providing strategic tax services to business owners, wealthy families, and executives, which has positioned the firm as a trusted advisor in the mid-to-large alternative investment space.

Wickwire has also been instrumental in shaping the strategic direction of RSM's tax practice in Southern California. His approach to tax planning for private equity groups and their portfolio companies has enhanced the firm's reputation for excellence and reliability in complex tax scenarios. He has played a pivotal role in developing staff and leading training programs that significantly enhance the firm's service capabilities.



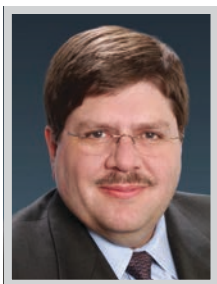
CASEY WINTERS

Partner
KPMG LLP

Casey Winters is a partner in KPMG's Financial Due Diligence (FDD) practice based out of Los Angeles. He has over 20 years of public accounting and consulting experience across several industries, including business services, retail, consumer goods, manufacturing, technology and industrial goods. He offers considerable expertise in buy-side and sell-side financial due diligence services to private equity investors and strategic buyers.

Winters has advised clients in more than 1,000 transactions ranging from \$20 million to \$30 billion, including international transactions throughout North America, Europe, Asia, Australia and the Middle East. He has grown the partner/managing director headcount in the practice from one to ten. He is also the chairman of the Board of Trustee at All For Kids, a nonprofit organization focused on preventing child abuse and providing opportunities to underprivileged children and new families.

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Business Journal's
TOP 100
ACCOUNTANTS
2024**



MARC WOLF

Financial Services Industry Practice Leader; Assurance Partner
CohnReznick LLP

Marc Wolf, CPA, serves as the leader of CohnReznick's Financial Services South/West Industry practice. A partner in the Accounting and Assurance department, he has more than 41 years of diverse experience in audit, tax and consulting services specializing in hedge funds, fund of funds, private equity funds, venture capital funds, real estate funds, private REITs, Regulated Investment Companies (RICS), registered investment advisors and broker-dealers.

Wolf's experience includes advising companies on organizational structures, supervision of audits, and ongoing consultation with management regarding various operational, transactional and tax matters. He also advises companies on various regulatory issues impacting the industry. He regularly lectures on a wide variety of topics at securities industry and family office conferences, such as SALT, MAR, OPAL, IMN, GAIM, Alternative Asset Summit, Institute for International Research, and Family Office Wealth Conference.



GREG ZELENAY

Managing Principal, Los Angeles
Baker Tilly

As managing principal at Baker Tilly, Greg Zelenay leads the Los Angeles region for one of the fastest growing accounting firms in the country. He has been integral on the merging and integration of several firms, restructured the local office footprint, and built one of the largest restaurant and franchisor practices on the west coast. Zelenay leads efforts at the firm to unleash and amplify its talent base and works on programs to identify non-traditional talent pools and build frameworks for alternative career pathways in the industry.

In 2024, Zelenay was named to the board of Baker Tilly US. He has developed impactful programs that collaborate with underserved communities, offering technical accounting training to individuals who cannot afford a university education. Additionally, he leads the firm's Stewardship Week for the Los Angeles offices, fostering community engagement and volunteerism.



SPECIALTY AWARDS



ACCOUNTING ICON AWARD

LARRY HAWORTH

Partner
Eide Bailly LLP

Larry Haworth, who today serves as partner of Eide Bailly, has been an accounting professional for more than 40 years. His first 25 years as a professional were spent as an audit and tax practice leader. He led the audit practice for two large regional firms. In addition to serving in firm leadership, he continues to manage a full book of client work.

While his first 25 years in the profession were spent at the leader and partner level, it is the next 15-year chapter that distinguishes Haworth from amongst his peers. In 2007, he and two other colleagues successfully created, launched and managed a full service accounting firm, Bessolo Haworth, in Sherman Oaks. The effort to start a new firm was not without its challenges. Haworth and two other colleagues started with limited resources and one staff member. They were able to build a book of business that grew five-fold with an employee base of 25 employees. Haworth was able to lead his firm through the challenging times of launch by effectively recruiting and onboarding staff who provide superior client service.

Today, having teamed with Eide Bailly, a Top 25 CPA and business advisory firm in the nation with offices all over the country, Haworth continues to be known for his mentorship and employee development experience and results. He understands how to both grow client revenue while simultaneously training staff members to take a leadership role in client service.



COMMUNITY IMPACT AWARD

ALBERT JANG

Managing Partner
Kim & Lee, LLP

Albert Jang, the managing partner of Kim & Lee, LLP, has been serving the Korean American Business Community since 1993 and has influenced the community with his sincere desire to advance innovative technology for the industry. In early 2000, he understood the changes in the accounting industry with international relationships and accounting principles where he had to step ahead to bring IFRS and other international accounting issues to Kim & Lee and become a successful leader at the firm, which then expanded its businesses to Korea, China, Vietnam, Mexico and Canada.

Jang is an expert on developing technology and adopted a cloud computing system in the early years before the pandemic, and is active in adopting AI into the practice with CAS business segments. He maintains strong conservative professional ethics in his day-to-day professional career. He believes the role of the accountant will shift toward consulting and a connection in the human side.

In addition to his day to day efforts at Kim & Lee, Jang has been serving several nonprofit organizations as a leader and participant. For example, he has been serving as a board member on organizations like Korean American Special Education Center for Autistic Children, the Korean American Foundation, the Korean American Coalition, Love in Music for teaching music to inner-city children, and many more. His philanthropic activities are primarily focused on disadvantaged children and minority community members. He has also served as president of the Korean American Chamber of Commerce.

SPECIALTY AWARDS



CPA TO WATCH

JACQUELINE KING

Senior Accountant
The SpringHill Company

Jackie King is a dedicated member of the accounting profession and has held jobs in several different industries and brought value to each of the companies she's worked with.

King is currently bringing these skills to her role as senior accountant at the SpringHill Company, a global consumer and entertainment brand created with a mission to empower greatness in every individual. The SpringHill Company unites three companies built by LeBron James and Maverick Carter: UNINTERRUPTED, the athlete empowerment media and consumer product company; SpringHill Entertainment, the premium scripted and unscripted film and television production company; and The Robot Company, the brand and culture consultancy. With a dynamic and diverse team committed to creating the most culturally inspired content, entertainment and products, The SpringHill Company is built to be the defining brand for a new generation.

King is helping The Springhill Company's mission to positively impact the world through media. She has helped implement processes at the companies where she has worked, including SpringHill, to help bridge the divide between the creative teams and finance teams with her ability to use both sides of her brain.

FINEMAN WEST & COMPANY

Congratulations to our Co-Managing Partners
Wendy On & Jeffrey Hyldahl

for being recognized by the
Los Angeles Business Journal
as 2024 Top 100 Accountants.



Pictured from L to R: Steven Jager, Partner, Wendy On, Co-Managing Partner, Stan Katz, Partner, and Jeffrey Hyldahl, Co-Managing Partner

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SPECIALTY AWARDS

MOST INNOVATIVE FIRM OF THE YEAR

GHJ

GHJ embarked on a visionary overhaul of its Client Experience (CX) program to redefine client engagement and elevate its service from industry standard to industry-leading. With our firm on the cusp of significant growth, GHJ Chief Strategy Officer led the charge in a meticulous strategic alignment, aiming to sculpt an unparalleled client journey. GHJ's vision was not just to maintain our high-touch client rapport but to elevate it, creating a seamless experience synonymous with the GHJ name, irrespective of departmental interaction.

GHJ's innovative initiative spanned 24 months and involved in-depth research, including 50 client interviews and 14 focus groups to uncover unprecedented insights into client needs and perceptions. Going beyond traditional client satisfaction surveys, GHJ's approach was a comprehensive, firmwide effort, with nearly 20 percent of employees actively participating in CX meetings to ensure a holistic and inclusive perspective. The program was executed through five phases: Discovery and Immersion, Current State Research, Visualization and Mapping, Future State Design and Action Planning. Real-time adjustments, such as a strategic overhaul of GHJ's website and social media, were made based on immediate client feedback. The program's innovative approach led to the creation of detailed "happy path" journey maps, which visualized ideal client interactions and set a new benchmark for the industry.

The outcome of GHJ's CX initiative was encapsulated in a new firmwide strategy that identified 14 key initiatives that would enhance GHJ's operations. This strategy has become an integral part of GHJ's culture, guiding the firm toward its goal of setting new standards in client service.

COMMUNITY IMPACT FIRM OF THE YEAR

DELOITTE

At Deloitte, the organizational purpose is to make an impact that matters. The firm aims to architect a more equitable future for all by leading on sustainability, equity, trust and social impact. In addition to \$2.6 million in cash donations to Los Angeles nonprofits in 2023, Deloitte provided over 19,000 traditional and skills-based volunteer hours to local Los Angeles nonprofit organizations during our annual day of service, Impact Day, and over the course of the year.

As part of Deloitte's \$75 million commitment to Making Accounting Diverse and Equitable (MADE), Deloitte is committed to generating more advisory, auditing and tax career opportunities and leadership pathways for the next generation of certified public accountants (CPAs) and empower a vision that works to help students see and realize their future in business through the prism and possibilities of accounting. Deloitte is committed to inspiring and preparing youth for long-term success by collaborating with high schools, colleges, state CPA societies and various nonprofits to bring accounting to life for thousands of racially and ethnically diverse youth through our Deloitte Academy: Accounting Edition program.

In 2023 Deloitte delivered Deloitte Academy: Accounting Edition workshops to several local Los Angeles schools, educating over 1,400 local students on career paths in accounting, finance and tax. Additionally, the firm leveraged its greatest asset – the skills and experience of its people – to provide over \$300,000 in consulting, tax, audit and risk & financial advisory pro bono services to LA organizations and have local leaders serving on over 100 community leadership positions.

SPECIALTY AWARDS



DIVERSITY, EQUITY + INCLUSION FOCUSED FIRM OF THE YEAR

ARMANINO

Armanino LLP, one of the largest independent accounting and business consulting firms in the US, has made significant strides in enriching the communities in Los Angeles. Through its unwavering commitment to corporate social responsibility, Armanino has actively engaged in numerous initiatives that foster economic development, educational support and environmental sustainability. Armanino's dedicated efforts have significantly impacted local communities in LA, offering invaluable resources and opportunities while reinforcing a strong sense of solidarity. Through volunteer programs, charitable donations, mentorship and job creation, Armanino's contributions are shaping a brighter future for all.

The firm's commitment to philanthropy has been unwavering, with a pivotal moment in 2017 when The Armanino Foundation was established. This foundation has expanded the firm's philanthropic reach. In 2023, Armanino made a substantial sum of \$729,423 in cash contributions to various charitable organizations.

Armanino's B Corp certification further strengthens its efforts by embedding diversity, equity and inclusion (DEI) into its core business practices. The rigorous evaluation process required for B Corp certification promotes continuous improvement in DEI initiatives. Public transparency through the B Impact Report ensures that Armanino remains accountable to stakeholders, fostering community trust. This certification requires equitable employee practices, including fair wages, inclusive hiring, career development opportunities and robust benefits, contributing to a more inclusive workplace. Armanino actively supports diverse communities through partnerships, volunteer work and charitable initiatives, promoting equity beyond the firm. Its diverse recruitment and retention strategies broaden the talent pool, while inclusive policies like anti-discrimination measures and flexible work arrangements create a respectful work environment.



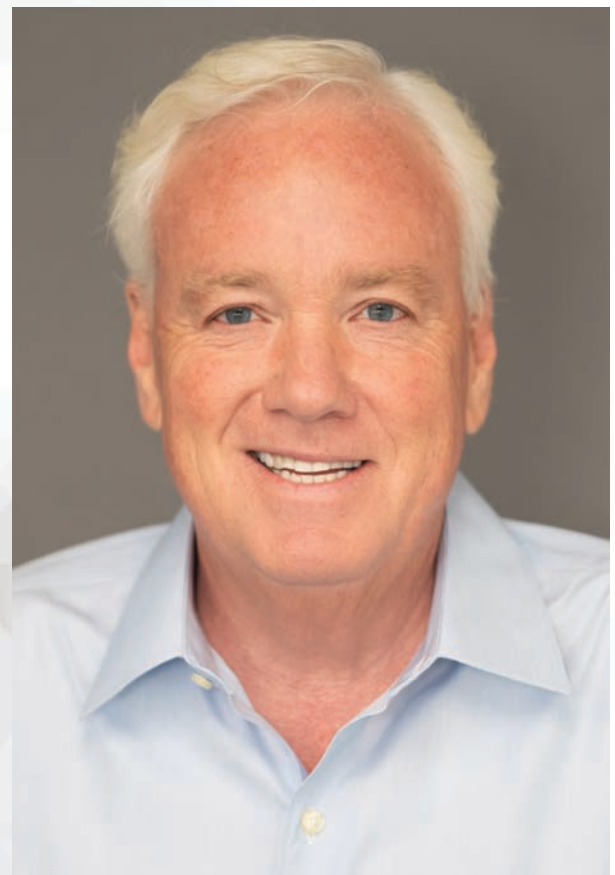
Milam, Knecht & Warner, LLP

Congratulates Michael Milam

on being selected as one of
LA's Top 100 Accountants.



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The Evolving Landscape of Forensic Accounting

By JEFF NEUMEISTER

Forensic accounting has markedly evolved beyond its origins in fraud detection and financial investigation, becoming a multifaceted discipline that is valuable across both traditional and non-accounting matters. Historically, forensic accountants were seen as specialists called in to examine financial discrepancies or uncover white-collar crime. However, the integration of advanced technologies and an increasingly complex regulatory environment have expanded forensic accounting into auditing, compliance, cybersecurity, supply chain management, and even environmental, social, and governance (ESG) areas.

Forensic accounting's rise in relevance within traditional accounting reflects its new role in auditing and compliance. In routine financial audits, forensic techniques are employed to enhance detection of irregularities that standard procedures might miss, improving audit quality and ensuring effective internal controls. Auditors now leverage forensic tools to proactively identify areas of risk before issues arise, allowing organizations to protect themselves against potential financial misstatements, fraud, and other vulnerabilities. In compliance, forensic accountants not only assist in ensuring adherence to regulatory requirements but also aid in developing robust policies to mitigate financial and reputational risks. This evolving role redefines forensic accountants as strategic advisors rather than reactive problem-solvers, bridging financial knowledge with a deep understanding of business operations and governance.

The surge in technology has been pivotal to this evolution, enabling forensic accountants to work with tools such as data analytics, artificial intelligence (AI) and blockchain to trace complex financial data. While earlier methods relied on manual investigation of records, modern forensic accountants now use data mining and AI algorithms to detect patterns and anomalies within large datasets, achieving speed and precision not possible through traditional techniques. Blockchain technology, in particular, provides a secure method for tracking and verifying financial transactions, making it easier for forensic accountants to uncover sophisticated fraud schemes that might otherwise remain undetected.

The demand for forensic skills extends beyond traditional accounting into cybersecurity and digital forensics. With businesses facing a surge in cyber threats, forensic accountants play a crucial role in investigating the financial implications of data breaches, tracing the financial paths of cybercrimes, and helping organizations develop risk-reduction strategies. Their responsibilities now include participation in incident response planning and collaboration with IT teams to create defense systems that protect both financial and digital assets. As a result, forensic accountants are essential in helping organizations navigate an increasingly digital landscape where financial and cyber risks are intertwined.

In corporate governance, forensic accountants contribute valuable insights to ensure the integrity of organizational practices. By assessing internal controls, forensic accountants can identify weaknesses that may be exploited and recommend preventive measures. This role is particularly important in sectors like banking and healthcare, where regulatory requirements are strict and the cost of non-compliance is



high. Through their expertise, forensic accountants help organizations bolster their compliance frameworks, avoid penalties and safeguard their reputations.

Mergers and acquisitions (M&A) is another area where forensic accounting has become indispensable. During M&A transactions, forensic accountants provide due diligence by identifying any hidden liabilities, overstated assets, or other financial discrepancies that could affect the value of the transaction. This level of scrutiny helps acquiring companies mitigate risks and negotiate more effectively, as it ensures the transaction reflects a fair valuation. Forensic accountants' work reduces the potential for financial surprises after the deal is finalized and provides the acquiring organization with a more accurate understanding of the financial landscape of the entity being acquired.

Forensic accounting also finds new applications in the increasingly relevant field of ESG. As companies prioritize sustainability and social responsibility, forensic accountants can verify the accuracy of sustainability reporting, scrutinizing disclosures related to environmental impact and social initiatives to prevent "greenwashing." Forensic techniques allow these professionals to trace and validate the financial data tied to ESG claims, thereby helping organizations maintain transparency and build trust

with stakeholders who are increasingly focused on ethical considerations in business.

The litigation support and dispute resolution domains remain traditional areas of forensic accounting application, yet they, too, have grown in scope. In legal disputes, forensic accountants are often called upon to quantify damages, assess lost earnings, or analyze the financial impact of breaches of contract. Their ability to communicate complex financial matters in understandable terms makes them valuable expert witnesses who can present findings clearly and persuasively in court, supporting the litigation process by providing unbiased financial insights.

Supply chain management is another area that benefits from forensic techniques, especially given the disruptions that many industries face. In supply chain investigations, forensic accountants analyze transaction histories to detect procurement fraud, evaluate contractual compliance and assess the financial impact of supply chain disruptions. These insights allow organizations to optimize their operations by identifying inefficiencies and areas of risk, resulting in both cost savings and enhanced supply chain resilience. For instance, forensic accountants may investigate a vendor's financial records to ensure that the organization is not overpaying due to collusion or inflated invoices, safeguarding organiza-

tional finances and improving procurement practices.

The demand for forensic accounting skills in both traditional and non-traditional areas is transforming accounting education as well. More institutions are now incorporating forensic accounting courses into their accounting programs, preparing students for a profession that increasingly requires investigative skills and familiarity with digital tools. This shift signals a broader recognition that forensic capabilities are not just niche competencies but are becoming essential for a well-rounded accounting education. As organizations seek professionals who can apply forensic insights across various business contexts, students who enter the field with these skills will have a competitive edge and broader career opportunities.

Forensic accounting is no longer limited to a single domain but is woven into the fabric of multiple sectors, from finance to digital security and beyond. By bridging traditional accounting practices with forensic approaches, professionals in this field provide invaluable insights across an array of business functions. Their ability to uncover hidden risks, strengthen organizational controls and proactively address financial threats positions them as crucial figures in modern businesses. As the economic landscape grows more complex and interconnected, the expertise of forensic accountants will be indispensable not only in upholding financial integrity but also in guiding organizations through the challenges of a rapidly changing world.

Jeff Neumeister CPA/ABV/CITP/CFF/CGMA, MAFF, CFE, CMA/CSCA, FCPA, CM&AA, PCI, MA, MBA, MS² is managing partner at Kelly+Partners Burbank. Learn more at kellypartners.com.





Providing Clarity & Building Confidence

In November 2017, a team of four individuals, including partner Karine Philippon, set out to establish the Los Angeles office of Forvis Mazars. Together, they sought to build a brand in the local market and grow the business alongside their clients — primarily subsidiaries of international groups and emerging growth companies in Los Angeles that raised capital, became large corporations, and expanded internationally.

The bold, entrepreneurial mindset of Philippon—now managing partner of the firm’s California and Arizona operations — and her team has been a key driver of the growth of the Los Angeles office, and is a reflection of the firm’s culture and values.

Originally from France, Philippon began her career as an auditor working with large public companies in Paris before coming to Los Angeles. With more than two decades of experience in public accounting, Philippon has an extensive background serving an array of technology, media, manufacturing and distribution companies as well as service organizations, bringing an “Unmatched Client Experience” to each engagement and preparing them for what’s next.

“We were able to be there from the beginning for our clients and support them in their growth journey, whether they are just starting up or going through an exit.” By providing clarity and building confidence, “we are able to grow

‘Being entrepreneurial is in my DNA. The reason I’m here is that the firm gives you challenges and opportunities to grow as a professional and a person.’



Karine Philippon

constantly challenged, that’s what you need to have fulfillment in your career.”

In addition to her career growth at Forvis Mazars, Philippon said that the firm has offered an exceptional culture for working mothers. As a mother of two, Philippon said, “At Forvis Mazars,

you can work very hard, but you can also have a personal life.” She added, “I have found an integration between my work and personal life that I don’t think I could find in any other environment.”

The firm recently announced the launch of the Forvis Mazars Protégé Program, designed to support high-performing female directors who are on the path to becoming partners — an initiative to foster talent and promote diverse voices and backgrounds within the firm’s partner and leadership teams.

Since 2017, Philippon and her team have grown the Los Angeles office’s revenue five-fold, saw an eight-fold increase in their client portfolio, and built a diverse staff of 40 professionals who provide audit, tax and consulting services — specializing in transaction and tax advisory

services and delivering value to small, medium, and large domestic and international clients. Building a team that encompassed a diversity of perspectives and experiences was front of mind for Philippon — currently, the Los Angeles team has more than seven nationalities represented and is led by four female partners.

Philippon also led the technology, media and telecom practice for Mazars in the US and globally, driving growth of the practice from 2020 through the firm’s creation of a new two-member global network, Forvis Mazars, earlier this year — which launched a new chapter in the firm’s history as a top 10 US public accounting firm. As a global network that brings together experienced professionals who understand local contexts, the firm’s culture respects and reflects the range of perspectives, knowledge and local understanding of its people and clients. Along with an expanded international presence, Forvis Mazars’ footprint in California has grown to include offices in Irvine, Sacramento and San Jose, as well as a presence in Phoenix, Arizona. With a strong international reach, and deeply rooted local teams such as the Los Angeles office, Forvis Mazars is global to see the big picture, and local to understand it.

To learn more about Forvis Mazars, visit forvismazars.us or reach out to a Forvis Mazars professional.




Congratulations to
ALBERT JANG, CPA
 – for being honored as this year’s
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Artificial Intelligence and Higher Education: The Challenges and The Promise

By ROBERT J. SHERIDAN and DEONE M. ZELL, PhD

A recent Washington Post article explained that it requires the equivalent of one 12-oz. bottle of water (as coolant) to produce one AI-generated email of 100 words.

That same week, plans were announced to reopen the infamous Three-Mile Island nuclear power plant for dedicated use by a single customer – specifically, to operate systems infrastructure and data operations in support of Microsoft’s AI platforms.

These events crystalize just two examples of growing concerns, even angst, regarding “full-throttle AI” – sustainability in environmental circles; and, industrial concentration in the capital markets and among their regulators. Similar anecdotes abound in fields as varied as privacy, data integrity and security, IP and personal brand identity rights, cybersecurity, intelligence and defense, and critical infrastructure – to name just a few.

Yet with an enormous velocity in capital investment, AI is transforming cognitive work at startling adoption and penetration rates. Just as the assembly-line revolutionized manufac-



turing in the early 20th century, there will be no turning back.

Ethan Mollick characterizes this future as one of “co-intelligence.” He and others foresee AI-enabled bots, custom-designed to collaborate with specific humans, to do specific work with hyper-productivity.

The disruptions for knowledge workers during this transition are, and will continue to

be, considerable and painful. Yet for those who focus, prepare and adapt, rewarding opportunities abound. Indeed, the “democratization of expertise” that such “Human/AI collaboration” portends carries the potential for scaled social mobility.

That hits close to home at the CSUN David Nazarian College of Business and Economics where we’re committed to and acting upon our responsibility to educate and prepare our students for a future in which AI-related skills are the keys to success. Our determination is not without risk or existential threat as AI challenges almost every aspect of higher education.

SCHOLARLY ACADEMIC RESEARCH AND PEER-REVIEWED PUBLISHING

Researching and publishing are the bedrock of academia. They rely upon ethical, individual effort and collaborative processes and norms to advance entire disciplines through the accumulated literature. Advances in AI bring both promises and perils for today’s research faculty – especially those still on tenure-track.

On the one hand, AI can automate and accelerate data collection and analysis, and ini-

tial scans and summaries of the literature. From these vast troves of existing research, AI can help form innovative and novel hypotheses to explore previously overlooked research directions and accelerate discovery. AI is particularly good at detecting patterns and insights otherwise hidden in plain sight within massive data sets that might elude human researchers. This presents the potential for breakthrough advances, especially in medical and scientific fields.

Scholarly advances often depend on the “replicability” of the academic research and its outcomes. AI can meticulously track and record every step of the research process. This improved documentation and standardization can lead to more reproducible studies, addressing a significant challenge in the study of complex problems.

Finally, AI can be a democratizing force in modern research making sophisticated analytical techniques more accessible to researchers with limited resources or technical expertise. This has the potential to level the playing field and foster more diverse contributions to academic knowledge.

Yet as with all industries, these profound



COREY FISCHER, CPA
Firm Managing Partner
Weinberg & Company, P.A.

Congratulations Corey Fischer for once again being honored as a Top 100 ACCOUNTANT by the Los Angeles Business Journal!



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Congratulations to
LARRY HAWORTH, CPA



For being recognized as the **2024 Accounting Icon of the Year** and again as one of the Los Angeles Business Journal’s Top Accountants.

You have always been at the “top” of our family.

—
Pegi Matsuda
Ernie and Kacie Haworth



and powerful AI capabilities threaten the future role of humans. Tools like the AI Scientist, which can automate entire research processes, raise the prospect that while we will still need smart PhDs to collaborate with the machines, we may not need as many of them.

Ethical concerns about bias in the training of AI platforms have been widely discussed, with various standards and regulatory solutions proffered. Until those congeal, individual researchers must do their own due diligence to ensure that their research does not perpetuate or amplify biases inherent in the data upon which they rely. It's a daunting task and a heavy responsibility to avoid skewing research outcomes that can have far-reaching consequences.

Finally, the power of these AI systems to process data might obscure serendipitous discovery – those paradigm-shifting moments of inherently human genius and creativity that lead to “eureka,” from which major scientific movements and advancements ensued.

Over the past five years, the Nazarian College faculty has risen to this challenging and highly competitive scholarship environment, producing a 31% increase in the number of unique papers published in peer-reviewed journals over our previous five-year accreditation cycle. Similarly, the number of publications per faculty member increased by 38% from cycle to cycle. This collective body of work has demonstrated thought leadership in fields such as AI, blockchain, cryptocurrency, machine learning and privacy.

AI TEACHING INNOVATIONS UNDERWAY AT CSUN

Even more encouraging, our faculty are bringing AI into the classroom with:

- Assigned AI-assisted student presentations
- Multimedia content creation for faculty lectures
- Personalized AI tutoring, with customized AI chatbots that combine course material and student profiles for mass-individualization of the tutoring experience
- Interactive learning materials with AI-enhanced textbooks and platforms with summarizations, explanations and quizzes to support student learning outside the classroom
- Real-time analysis of data gathered from students in the classroom to foster engagement and dynamic, interactive learning – even in large group settings
- Experiments with enhanced digital lectures with voice cloning and avatar creation for video lectures for online classes.

BEYOND THE CLASSROOM

Strategic Planning: This past Spring, the Nazarian College began a long-term strategic planning exercise with a lengthy survey of open-ended questions sent to some 5,000 students, faculty, staff, alums and community leaders. We processed the rich, voluminous, and unstructured data gathered through an AI engine that summarized major themes and constructs, ranked concerns and recommendations by prevalence, summarized contrarian points of view, and spiced the analysis with the “Top 20

Provocative Quotes.” These outputs were used to drive focus groups and tabletop discussions at our annual faculty-staff retreat. This AI-enabled approach not only accelerated the process, it made the process possible.

Professional Education Beyond a Degree:

This award-winning, four-year initiative encouraged faculty to assign skills-based certificates, offered by respected third-party corporate and academic content authors, as assignments that would complement and augment classroom learning. The intent was to balance the long-term value of a four-year degree, with the short-term necessity of graduating students as “job-ready on day one” – with skills that matter to employers. The JPMorgan Chase Foundation awarded a grant to expand the program to students across all nine colleges of the CSUN campus, with an emphasis on “tech skills” that are valued in every discipline and industry – data analytics, machine learning, cloud computing, technical risk management and cybersecurity, AI and Python.

Over the course of the PEBD initiative, Nazarian College students earned 5,548 third-party certificates. As a result of the JPMCF grant, 522 Coursera Academy tech-skill certificates were earned by 423 students enrolled in CSUN degree programs ranging from geophysics to fashion merchandizing, electrical engineering to journalism, literature to global supply chain management.

AI and the Workforce of the Future Symposium: At 4:30 p.m. on November 19,

the Nazarian College will extend our impact in AI by sponsoring a symposium that will bring together global thought leaders – each of whom is moving the needle on artificial intelligence, each from a different perspective and each with a different mission.

We hope all of our employer, business and community partners will join us on campus at the Soraya for what promises to be an informative and thought-provoking evening. Interested attendees please register here: engage.csun.edu/WorkforceFuture.

...
The Nazarian College ranks among the top 5% of business schools by virtue of its AACSB accreditation and has been regularly awarded top accolades from the Princeton Review, US News & World Report, CEO Magazine, Money Magazine and other esteemed agencies over the past six years. With over 6,700 majors and 400 minors, the college offers one of the largest undergraduate business programs in the nation and top-ranked graduate business programs. As part of CSUN, which is a certified Hispanic-serving university, the Nazarian College student body boasts ethnicities, races and nationalities from around the world as well as members of all socio-economic strata.

Bob Sheridan serves as the executive director of the Center for Career Education and Professional Development at the CSUN David Nazarian College of Business and Economics, where Deone Zell, PhD, is a professor of management.



let's make some noise

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Why Companies Should Prioritize the Client Experience

By MARI-ANNE KEHLER

Acquiring new clients is costly and time consuming. According to the Harvard Business Review, acquisition costs five to 25 times more than retention. As businesses to face staffing shortages and regulatory changes, a well-developed client experience (CX) strategy can be a game-changer for companies looking to reduce churn, build loyalty and drive sustainable growth. When considering a formal CX strategy, a three-step approach can ensure long-term success in both client engagement and retention.

DEFINE YOUR VISION

An effective CX strategy begins with a vision for the organization: a clear definition of how a client should feel when working together and what is important to learn about them. Leadership buy-in is crucial not only to communicate these values but to ensure that every department consistently aligns with your CX vision to make it more than just a top-down initiative.

At my advisory and accounting firm GHJ, our CX program started with a commitment to creating a cohesive experience for all clients, no matter which department they work with or how they found us. From this vision, we mapped out what we wanted to learn about clients, why we wanted to learn it and what we would do with this information to achieve our vision.

This process identified common themes from client feedback and uncovered previously unnoticed pain points. Ultimately, these insights informed our client engagement goals and helped unify our approach to service delivery.

Defining a clear purpose from the outset establishes the program's specific goals and metrics and ensures that employees at all levels were aligned and committed to a unified vision.

UNDERSTAND THE CLIENT

Understanding your target client is crucial to understanding their needs, expectations and pain points. In developing our CX program, GHJ developed a research-driven approach that included surveys, interviews and focus groups with both clients and internal client-facing teams. The insights we gathered helped shape our CX strategy by guiding specific actions and creating a roadmap to meet client expectations.

Gathering a well-rounded view of your clients may take multiple rounds, but this information serves as the basis for the entire CX strategy, so it is important to revisit this step throughout the process and ensure client needs are reassessed and reevaluated throughout the process.

During the discovery stage, it is important to be open. You will get a lot of information from clients — these insights can be large or small and positive or negative, and they might even

have nothing to do with the original aim, but that does not mean they are not helpful.

For example, we learned many GHJ clients prefer to follow individual team members over the Firm's LinkedIn page. We adapted our social media strategy to teach team members how to engage clients on their own pages.

CREATE AN ACTION PLAN

Once you understand client needs, it is time to build a CX strategy that turns these insights into meaningful action. Incorporate both quick wins for immediate impact and a long-term action plan for sustained results.

When creating this plan, choose clear, relevant metrics that align with your CX objectives and provide a concrete way to measure progress over time. Metrics should not only track short-term gains but also show how your strategy evolves to meet clients' changing needs. Additionally, assigning roles and responsibilities for each part of the plan fosters accountability, ensuring everyone is aligned in advancing CX goals.

At GHJ, we used this structured approach to identify short- and long-term actions that would enhance client engagement. By mapping these efforts into a three-year roadmap, we created a focused, measurable plan that prioritized high-impact initiatives and built momentum to continuously strengthen our client relationships.

COMMIT TO CLIENT SUCCESS

Uncovering client insights and creating action plan goals are important, but they are also on-going. Your CX strategy is not a one-time project, it is a living, evolving commitment to clients. Client needs and preferences are changing constantly, so remain flexible throughout the process.

A significant outcome of GHJ's CX initiative has been a cultural shift toward greater client-centricity. Although client focus has always been part of GHJ's brand promise, our CX strategy amplified this by strategically involving every department in the client experience. This firm-wide commitment has reshaped GHJ's culture and reinforced the team's alignment with client needs to foster stronger, more proactive client relationships.

Developing and implementing a CX strategy is an investment, and one that works best when you go all-in. For GHJ, prioritizing client experience enables us to deliver quality service that consistently meets our client expectations as we grow.

A client-centered approach enhances any company's brand by fostering trust and loyalty and driving growth.

Mari-Anne Kehler is the chief strategy and growth officer at GHJ. Learn more at ghjadvisors.com.

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