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CHAIRMAN'S LETTER



Happy New Year! I hope you all enjoyed the holidays and are now ready to embrace a brand new year, one in which I'm confident will bring growth and success to all of our members. I urge you to take full advantage of your membership in BKR to help your firm compete in this still-challenging economic environment.

Start by making a new year's resolution to attend a BKR meeting outside of your region, which is sure to expand your professional and personal horizons. Choose from Sydney, Prague, or San Diego, each of which will provide exceptional opportunities to learn, share, and grow your and your clients' businesses. Asia/Pacific kicks off the 2010 round at the Shangri-La Hotel, in Sydney, from April 16-19; EMEA at the President Hotel in Prague, from May 8-10; and Americas at the Lodge at Torrey Pines in San Diego, from May 21-25.

By attending meetings, participating in committees, and sharing the expertise and experience of your fellow members and the myriad tools available on the BKR web site, you are sure to meet, if not exceed, your goals for 2010.

I am pleased to ring in the New Year by welcoming three new firms into the association: **Fischer Cunnane & Associates Ltd** (West Chester, Pennsylvania, USA), **Lopez, Alegria & Asociados, S.C.** (Caracas, Venezuela), and **St. Clair CPA Solutions** (Conshohocken, Pennsylvania, and Merchantville, New Jersey, USA). Read all about our new members on page 3.

Despite the economy, 2009 was an extremely successful year for BKR. We managed to increase the net number of member firms compared to this time last year by nine. We also launched a brand new, user-friendly web site with state-of-the-art interactivity; completely revamped and expanded our international tax matrix; held the most successful worldwide meeting ever, commemorating our 20th anniversary, as well as three successful regional meetings; and

Continued on page 3

CORPORATE TAX COMPARISONS FROM ACROSS THE WORLD

by Peter MacLean (Sydney)



Peter MacLean World.

As announced at the BKR International Worldwide Meeting in New York in October 2009, BKR's International Tax Committee (ITC) has substantially upgraded the Corporate Tax Comparisons from Across the

The new and improved version of the matrix is now available to BKR International members at www.bkr.com, where it can be accessed through the International Tax section of the web site, as well as on the What's New page.

In addition to its greatly improved appearance, the new version of the Corporate Tax Comparisons matrix has additional functionality and user-friendli-

ness. Members can choose to display only those countries whose corporate tax information they require. This is achieved by checking and unchecking the relevant boxes at the top of the matrix beside the name of the countries of interest. This can be done for multiple countries, thereby enabling ready comparisons of the respective tax details of numerous countries to be shown side by side.

The improvements are such that it will now be possible to add the corporate tax details for every country in which BKR International is represented. We, therefore, ask that member firms in countries not currently represented on the matrix provide the details required to complete your country's entry and submit it to the BKR Executive Office.

Continued on page 2

WOULD YOUR FIRM PASS A SECRET SHOP?

By Wendy Nemitz, Ingenuity Marketing Group LLC

The average business loses 50 percent of its customer base every five years, according to Harvard Business Review and Forrester Research. Couple that with the statistic that it costs seven to nine times more to acquire a new customer than it does to retain a current one, and why wouldn't you do everything you could to land a new client and keep the ones you have?

After years of teaching accountants and attorneys how to market and sell themselves and their firms, we had a sneaking suspicion that many did not walk the talk. Posing as prospects, we "secret shopped" some CPA and law firms. This is what we found.

The First Impression

A lot of CPAs have told us "you never get a good client from a cold call, and relationships are the only way to sell accounting work." Relationships might keep the customer, but first you have to get the customer. A few years ago we had a smart young researcher call 12 of the top 25 CPA firms in our market. We excluded the Big Four and some of the very large regional firms. Her mission was to find a new accounting firm for her boss. She told the accounting firm receptionists that she was looking for an accountant with small business experience, because we were outgrowing our bookkeeper and sole practitioner CPA.

Some receptionists were perplexed about what to do or say since our caller did not request a specific person. One sent her to the marketing person, who was helpful. She was often sent to voicemail and, almost as often, her message was not returned—ever. In a few cases, she left more than one voicemail, and her call was still not returned. This wasn't during tax season; we made the calls late in the fall. Two CPAs out of the 12 who received her calls were good. We later talked to the accountant who landed "the job" and confessed our ruse. "I get clients from cold calls all the time," he told us, "and our receptionist knows to give those calls to me." He knew cold calls can turn into warm clients if you know how to do it well.

If you want to harvest prospects who call from a web search, your sign, or other non-

referral means:

- Avoid voicemail—get the prospect to a person if possible, and make sure the people answering the phone know how to transfer a call.
- People designated as cold-call receivers need to ask good questions. Give them a cheat sheet with the important details to uncover.
- Make an appointment to meet with the prospect as soon as possible.
- Recognize and reward people who are able to take a cold call and turn it into a client.
- Notify marketing so appropriate materials are sent out on time.
- Be aware the best calls may come at the worst times, like right before a tax deadline.

The Second Impression

Our next phase of research involved in-person meetings with 10 professionals. At the meetings, we evaluated every aspect of the experience from whether the directions on the web site made sense to how the receptionist greeted us to the actual meeting and follow-up. Most professionals and firms failed. What should you do?

- Dress your reception area with firm materials and awards or media coverage. If prospects spend 10 seconds there, make sure they receive a positive impression while they wait.
- Always prepare for the meeting, especially with web sites available.
- Go with the mindset that you want to learn everything about the prospect, including why they are looking for a new accountant, before you say anything about yourself or the firm. Listen!
- People assume you have good credentials. They make a choice based on whether they like you and whether they think you will do a good job for them.
- Focus on connecting with them by being sincerely interested in their challenges and opportunities.
- When it is your turn to speak, talk about other clients you may have helped in similar

situations.

- Offer free advice on the spot; it is the only way they will see that you know what you are talking about.
- Ask for their business—many people didn't.
- Follow up. Although we usually recommend a handwritten thank-you note, one professional sent a thank-you email to us before we got back to the hotel. Keep following up until you get the "No."

Remember to give your existing clients the same considerations you would a new prospect—don't give them a reason to check out the competition. In many surveys on customer loyalty, one of the main reasons clients defected was employee attitude. They simply felt they were no longer valued, respected, or understood. You may think your firm is doing everything right, but it would be wise to do a "Secret Shop" just to be sure. The only thing you have to lose is a client.

* * * * *

Wendy Nemitz is a principal at Ingenuity Marketing Group LLC. She has been working in professional services marketing and sales since 1987. For more information on this or other marketing topics, see www.ingenuity-marketing.com.

CORPORATE TAX COMPARISONS (Continued)

Continued from page 1

We also ask that member firms in countries that are represented on the matrix continue to check their country's details periodically as required to ensure the information provided remains up to date.

We trust you will find the new and improved version of Corporate Tax Comparisons from Across the World to be a useful and quick reference tool, and ask that you please provide any feedback on the matrix to the BKR Executive Office at bkr@bkr.com or myself at peter.maclean@wwnsw.com.au.

MEMBERSHIP UPDATE

BKR International is pleased to announce the acceptance of **Fischer Cunnane & Associates Ltd** (West Chester, Pennsylvania), **Lopez, Alegria & Asociados, S.C.** (Caracas, Venezuela), and **St. Clair CPA Solutions** (Conshohocken, Pennsylvania, and Merchantville, New Jersey) into the association.

Formed in 2001, Fischer Cunnane & Associates Ltd offers numerous accounting, audit, tax, valuation, and business and management advisory services. The firm specializes in the areas of distribution transportation, ERISA audits, manufacturing, and professional services. With seven partners and a staff of 45, Fischer Cunnane & Associates Ltd is the largest certified public accounting firm in Chester County, Pennsylvania.

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URL: <http://www.fischercunnane.com>
Contact: Robert Fischer

Founded in 2008, Lopez, Alegria & Asociados, S.C. offers numerous audit and tax services in a variety of areas. The firm specializes in government entities and institutes, con-

struction enterprises, service companies, manufacturers, car dealerships, and travel agencies. Lopez, Alegria & Asociados, S.C. comprises five partners and a staff of 25.

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r Alegria@lopezalegria.com
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Roxana Alegria

St. Clair CPA Solutions was established in 1999, and offers a variety of audit, accounting, tax, business consulting, and financial services. With eight partners and a staff of 52, the firm has considerable experience with real estate development, franchisors, mortgage banking, construction contracting, service industries, and governmental entities.

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CHAIRMAN'S LETTER (Continued)

Continued from page 1

added new committees and a new full-time executive director for the EMEA Region.

I expect 2010 to be just as successful, if not more so. BKR's next Annual Worldwide Meeting is already being planned, and will be held at the Westin Excelsior Hotel on the famous Via Veneto in Rome from October 30-November 2. All member firms receive one free partner registration, which includes all social events. For our complete meeting schedule, see page 5.

You will also soon be receiving BKR's 2010 Directory of Members and revised Marketing Brochure. Be sure to use them and take them with you to all of your prospects and referral sources whenever possible, as they clearly demonstrate your firm's extended influence and global capabilities. We will all continue to grow the success of our firms by thinking about how our BKR associates can help our clients in making their activities, wherever they are in business, even more profitable. We are there not just to record the history of how they have done, but to help them increase their own net worth; BKR helps us do this.

I wish each and every one of you a healthy and happy 2010, and look forward to sharing another successful year as a fellow member of BKR International! Please contact me at any time with your ideas and suggestions to make BKR an even more valuable resource to you and your partners. See you soon.

Regards,



Bob Rothenberg

When referring work to other BKR members, avoid miscommunication! Be sure to put (and get) the engagement requirements in writing. Use BKR's convenient referral form! Download it at www.BKR.com > Member Services > BKR Library > BKR Tools.

REMINDER!

Submissions for the March/April 2010 issue of the BKR International Worldwide Bulletin are due by Monday, February 8, 2010.

Electronic formats are preferred for both text (e-mail, Word, or PDF documents) and photographs (TIF or high resolution JPG attachments).

BKR MEMORIAL

It is with great regret that **Soberman LLP** (Toronto) announces the passing of **Irving Rosen** on November 2. He was 74.

Irving became a partner with Soberman LLP (formerly Soberman Isenbaum & Colomby LLP) when Rosen Ezrin & Ogus merged with them in 1988. He led the firm's professional liability, negligence, and misconduct practice, and was also a member of the firm's Management Committee.

Irving held many executive positions and was chair of the Professional Conduct Committee, chair of the Advertising Ethics Committee, and president of the Institute of Chartered Accountants of Ontario. He was also president of the Public Accountants Council, was on the executive board of the Canadian Tax Foundation, and was a member of the Public Interest and Integrity Committee of the Canadian Institute of Chartered Accountants.

In 1985, Irving received the Award of Outstanding Merit of the Institute of Chartered Accountants of Ontario. He was instrumental in the growth and direction of the firm.

Irving is survived by his loving wife Vivian, his brother Murray, children Joel and Kristine, and Shanna and Adam. He will also be sorely missed by his grandchildren.

To sign the memorial book for Irving, visit <http://www.benjaminsparkmemorialchapel.ca/MemorialBook.aspx?snum=126132&sid=135417>.

MEMBERS MAKE 2009 LIST OF BEST ACCOUNTING FIRMS TO WORK FOR

BKR is proud to announce that three of its member firms made Accounting Today's 2009 list of the Best Accounting Firms to Work For.

Johanson & Yau Accountancy Corporation (San Jose [Silicon Valley]), **Bland & Associates, P.C.** (Omaha), and **Davidson, Holland, Whitesell & Co., PLLC** (Hickory) have claimed the 38th, 48th, and 57th spot, respectively, on the list for medium-sized firms (25-249 employees).

The survey was designed to recognize accounting firms that best benefit the nation's economy, as well as its workforce and businesses.

The list is composed of 100 companies and is divided into three groups: 20 small-sized companies (15-24 employees), 65 medium-sized companies (25-249 employees), and 15 large-sized companies (more than 250 employees).

To be considered for participation, companies had to fulfill the following eligibility requirements:

- Be a for-profit or not-for-profit business;
- Be a publicly or privately held business;
- Have a facility in the United States;
- Have at least 15 employees in the United States;

- Must be in business a minimum of one year; and
- Be an accounting firm.

Companies from across the country entered the two-part survey process to determine the Best Accounting Firms to Work For. The first part consisted of evaluating each nominated company's workplace policies, practices, philosophy, systems, and demographics. The second part consisted of an employee survey to measure the employee experience. The combined scores determined the top companies and final ranking. Best Companies Group managed the overall registration, survey, and analysis process, and determined the final rankings.

For more information on the Best Accounting Firms to Work For program, visit www.BestAccountingFirmstoWorkFor.com.

BKR STATS:

142 Firms
262 Offices
73 Countries
932 Partners
7,608 Professional Staff
1,098 Administrative Staff

BKR REFERRALS

<u>FROM</u>	<u>TO</u>	<u>TYPE OF WORK</u>	<u>FEES</u>
Watkins Uiberall, PLLC (Memphis)	Miller & Company Certified Public Accountants, PLC (Little Rock)	Tax Free Bond Arbitrage Calculations	\$42,750 (US)
Watkins Uiberall, PLLC (Memphis)	Miller & Company Certified Public Accountants, PLC (Little Rock)	Business Valuations	\$10,000 (US)
Lohn Caulder LLP (Vancouver)	Conner Ash P.C. (St. Louis)	409A Plans and State Tax Consulting	\$1,200 (US)
Albrecht, Viggiano, Zureck & Co., P.C. (Long Island)	Conner Ash P.C. (St. Louis)	Inventory Observation	\$587 (US)

WORLDWIDE BULLETIN

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SUBMISSIONS

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

2010 MEETING SCHEDULE

January 12	Firm Roundtable Meetings The Palazzo Hotel Las Vegas, Nevada, USA
January 18	High Net Worth Families/Estate Planning Committee Telemeeting*
January 20	Manufacturing Committee Telemeeting*
January 25	U.S. Tax Committee Telemeeting*
January 26	Canadian Tax Committee Telemeeting*
February 1	Business Valuation and Forensic Accounting Committee Telemeeting*
February 10	Leading Edge Technology Committee Telemeeting*
February 17	Human Resources Committee Telemeeting*
March 1	Real Estate and Construction Committee Telemeeting*
March 10	Marketing Committee Telemeeting*
March 16	Affordable Housing Committee Telemeeting*
March 24	Firm Administrators Committee Telemeeting*
April 16-19	ASIA/PACIFIC REGIONAL CONFERENCE Shangri-La Hotel Sydney, Australia
April 26	Small Business Support Services Committee Telemeeting*
May 4	Emerging Leaders Committee Meeting Chicago, Illinois, USA
May 8-10	EMEA REGIONAL MEETING President Hotel Prague, Czech Republic
May 21	Governmental/Not-for-Profit Accounting and Auditing Committee Meeting
May 22-25	AMERICAS REGIONAL MEETING Lodge at Torrey Pines San Diego, California, USA
September 23-24	Health Care Accounting/Tax, Advisement and Practice Management Consulting Committee Meeting Offices of Watkins Uiberall, PLLC Memphis, Tennessee, USA
October 30-November 2	ANNUAL WORLDWIDE MEETING Westin Excelsior Rome, Italy

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

NICHE COMMITTEE NEWS

Go to www.bkr.com > Member Services > Committees for detailed information on each of BKR's 27 Committees

Affordable Housing **NEW**

BKR's newest committee, Affordable Housing, held its first telemeeting on December 8.

Kevin Martin (Boston) is serving as chair. The group discussed the types of clients they have and the work they are doing for them, their competition, fee pressure, marketing ideas, audit efficiency, and what they want to get from the committee.

Their next telemeeting is scheduled for March 16.

Canadian Tax

BKR's Canadian Tax Committee held a telemeeting on October 13.

Topics included GRIP 2001-2006 and notice of assessments, GRIP dividend declarations, harmonized sales tax, the Lipson case, the value of voting-only shares, debt parking, "The Double Edge of Fraud," audits on the residency of trusts, GSTs, and opcos and insurance/holdco freezes.

The next telemeeting is scheduled for January 26.

Business Valuation/Forensic Accounting

The committee's teleconference was held on November 30.

Steven Stark (Denver) was introduced as the new co-chair. Agenda topics included underserved industries in the valuation field, a report on the AICPA Business Valuation conference, and comparisons between IBISWORLD and First Research for industry information. IBISWORLD has since extended a one-month trial period to committee members.

The next teleconference will be held on February 1.

Emerging Leaders

The committee held a telemeeting on December 7.

Guest Speaker Steve Erickson, a national consultant to CPA firms, presented a session on "How to Differentiate Yourself by Providing Extraordinary Client Services." He provided a

discussion outline for improving client service and a list of important issues for engagement management. The committee also discussed the impact of the recession on fee reduction and other matters.

The committee will hold a face-to-face meeting on May 4.

Firm Administrators

The committee held a telemeeting on December 9.

Participants discussed how firms are preparing for the flu season and concerns related to H1N1. Other topics included policies on use of social media for business purposes, identity and security issues, as well as encryption requirements.

The committee's next telemeeting will be held on Wednesday, March 24.

Health Care Accounting/Tax, Advisement and Practice Management Consulting

The committee held an in-person meeting on November 12 & 13, in Orlando, Florida.

Guest speakers discussed current industry trends and physician investment in ambulatory surgery centers, asset protection strategies for physicians, avoiding false claims, preparing for health reform and a transformed health system, and an RAC update. Committee issues, including the Dr. Perspectives newsletter, sharing publications, and case studies, were also discussed.

The committee's next meeting will be held on September 23 & 24 at the offices of **Watkins Uiberall, PLLC** (Memphis).

Human Resources

The committee held a telemeeting on November 18.

Topics included professional staff bonus plans and CPA exam reimbursement policies. Given the current economic situation, members discussed what firms are doing this year for holiday parties and employee appreciation events. Some firms are combining holiday events with fundraising efforts for local chari-

ties.

The committee's next telemeeting will be held on Wednesday, February 17.

Leading Edge Technology

The Leading Edge Technology Committee held a telemeeting on November 11.

Outgoing Chairman **Jim White** (Jacksonville) was thanked for his service to the committee, and **Paul Abke** (Detroit) was introduced as the new committee chairman.

Topics discussed during the telemeeting included defragmenting servers and workstations, PPC checklists and Engagement, software as a service, user e-mail policies, e-mail retention, CCH Document, back-up solutions, mifi versus smart cards, hard drive encryption, secure portals, de-duplication, e-mail encryption, cloud computing, and the format for future committee telemeetings.

The committee will hold its next telemeeting on February 10.

Marketing

The committee held a telemeeting on December 14.

Guest Speaker Kristy Gusick, Growth Consultant at Ingenuity Marketing Group, LLC, presented a session on social media. She provided an overview of LinkedIn, Facebook, and Twitter, and discussed the benefit of each from a business development perspective. She also provided recommendations on how firms can utilize social media sites and guidelines for creating office policies for their use.

The committee's next telemeeting will be held on March 10.

Real Estate/Construction

The Real Estate/Construction Committee held a telemeeting on December 1.

Topics included a discussion of the AICPA Construction Conference, clients and the economic stimulus package, the state of members' clients, new clients, and construction surveys.

The next telemeeting has been scheduled for March 1.

MEMBER NEWS AND NOTES

Houston, Texas

Briggs & Veselka Co. is pleased to announce that **Susan Lehrer** has joined the firm as director of Practice Development, **David Tate** has joined the firm as senior tax manager, and **Beth Willard** has joined the firm as a tax manager.



Susan Lehrer



David Tate

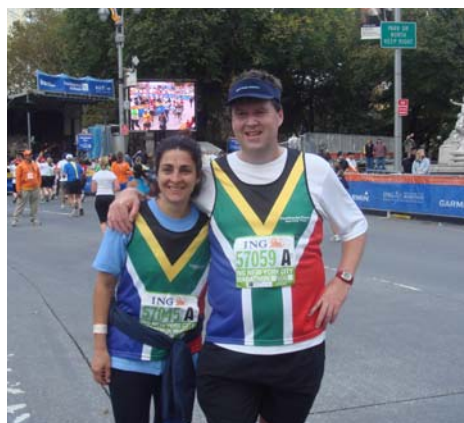
Johannesburg, South Africa

As many delegates at BKR's Annual Worldwide Meeting in New York in October asked to be advised,

Boake Incorporated is happy to announce that **Graeme Boake** and **Lorella Riccardi** finished their debut marathon (The New York Marathon) in five hours 24 minutes in fine style. **Alberto Riccardi**, a seasoned long distance runner, finished in three hours 51 minutes. They all felt their times could have been better, but the social side of the conference took its inevitable toll.



Beth Willard



Lorella Riccardi and Graeme Boake at the 2009 New York City Marathon

London, United Kingdom

Blick Rothenberg, Chartered Accountants has had a busy autumn, unhampered by heavy English rains, which caused regional flooding.

In anticipation of Europe-wide changes in VAT law, specialist VAT partner **Alan Pearce** informed a large audience at the Renaissance Chancery Court Hotel in London of the imminent UK VAT changes. The seminar received great feedback and, as a result, Alan was then forced to do it all again to another rapturous audience at Blick Rothenberg's "international trade" seminar.

As usual, Blick Rothenberg personnel have continued to address international audiences. International Business Manager **Mary Shepherd** was invited to speak at an event in Riga, Latvia, organised by the British Embassy, to encourage Latvian businesses to come to sunny (if temporarily rain-soaked) London.

Meanwhile, partner **Steven Bruck** undertook a similar exercise aimed at Spanish businesses at a seminar organised by the Spanish Embassy in London together with the inward investment agency Think London and the Spanish Chamber of Commerce in Great Britain. Steven is more used to addressing German-speaking audiences, but was nevertheless not lost for words on this occasion as even the most Spanish of guests appeared to understand his English humour.

Whilst all of this marketing effort continued, a wide selection of Blick Rothenberg and BRAL staff took advantage of the company policy that encourages charitable work in the community by taking part in a volunteer project to develop the back garden of a mental health organisation. By all accounts, a good time was had by all and much satisfaction was gained by the participants.

Manchester, United England

Cassons is excited to announce that it has been named Accountancy Firm of the Year at a prestigious awards ceremony.

Cassons chartered accountants and business advisers scooped the top accolade at the event held by the North West Society of Chartered Accountants. The award was presented at a ceremony at the Stanley House



The Cassons team celebrates being named Accountancy Firm of the Year by the North West Society of Chartered Accountants.

Hotel in Salmesbury, attended by fellow accountants and other professionals from around the North West of England.

The award for Accountancy Firm of the Year focused on the nominees' unique way of doing business, their ability to respond to challenging times, and, most importantly, their customer service record with particular emphasis on how they have been actively helping their clients through the recent recession.

Napthens Solicitors sponsored the category, and Keith Melling, partner at the firm, presented the award that night.

This is the second award that Cassons has won in recent months; in October, Les Nutter was named the 2020 Group's Managing Partner of the Year.

Memphis, Tennessee

Watkins Uiberall, PLLC is pleased to announce that **Ben Watkins** was among four business leaders recognized for carrying on the tradition of Memphis entrepreneurship.



Ben Watkins (left) with Dr. Rajiv Grover, dean of Fogelman College of Business and Economics at the University of Memphis

MEMBER NEWS AND NOTES (Continued)

The University of Memphis presented Ben with its Outstanding Alumnus award at the 17th annual Fogelman College of Business and Economics Alumni Day luncheon, which was held at the university in October.

Mt. Arlington, New Jersey

Nisivoccia & Company LLP is proud to announce that **Raymond Nisivoccia**, founding partner of the firm, was elected as a member of the board of trustees of Centenary College in Hackettstown, New Jersey, effective October 24.

Ray has been in practice since 1959. A graduate of Seton Hall University, Ray specializes in the areas of tax, government accounting, financial planning, and management advisory services for a broad base of clientele operating in many different business industries and associations. He is licensed in New Jersey as a certified public accountant, registered municipal accountant, and public school accountant.



Raymond
Nisivoccia

The firm has also announced that, on Saturday, November 21, employees from Nisivoccia & Company LLP took part in a Habitat for Humanity build in Morristown, New Jersey. Tasks included filling many wheelbarrows with dirt and gravel, erecting an electrical panel, and nailing joists.



The Nisivoccia & Company team helping out in Morristown, New Jersey

Nicosia, Cyprus

Euroglobal is excited to announce that

the firm has won the engagements for the provision of payroll and accounting services for Olympic Air in the following cities: London, Istanbul, Nicosia, Bucharest, Vienna, Brussels, Sofia, Paris, Milan and Rome, Cairo and Alexandria, Belgrade, Tirana, and Amsterdam.

The firm is currently in the process of finalizing and signing the single consolidated engagement letters—one for the payroll services and one for the accounting services.

The firm would like to take this opportunity to thank those who assisted in promptly providing the quotations that enabled Euroglobal to secure this engagement.

Ottawa, Ontario, Canada

Welch LLP is pleased to announce that

Jim McConery has been promoted to partner in the Ottawa office. Jim began his career as a CA with the firm and went on to gain valuable experience during his 11 years with a national firm. Jim McConery rejoined Welch in 2007, and leads the firm's estate and succession planning services.



Welch would like to congratulate its Chartered Accountant (CA) finalists for passing the Uniform Final Examination (UFE): in Ottawa, **Alison Haerkens, Eric Liebmann, Diana Swedani, Michael Walsh, and Anni Zhu**; and in Belleville, **Timothy Bates, James Cleaveley,**

Andrea Pickett, Rajeev Sakhuja, Monica Skelton, Robert Young, and Dan Zhang. All seven of the Belleville UFE writers passed.

Congratulations to **Barbara Effenberger, Virginia Lackey, Chris Lawson, Caroline McDonnell-Alégre, Andrew Milne, Joshua Smith, and Scott Wark** on

their promotions to manager in the Ottawa Office, and also to **Melanie Nash and Tracy Parks** on their promotions to senior manager in the Belleville

office.

Welch would like to welcome **Zoran Vranjkovic**, CA, who has joined the Ottawa office as senior manager. Zoran has been practicing tax with a national firm and is a strong addition to the tax group. He brings a wealth of personal and corporate tax planning experience to the firm.

The Welch LLP Ottawa office is very proud of the generosity of its staff in this year's United Way campaign, raising \$32,300.

In December 2009, the firm ran three seminars for clients on the upcoming harmonization of the Canadian Goods and Services Tax (GST) with the Ontario Provincial Retail Sales Tax (PST), due to be implemented on July 1. Approximately 250 clients were in attendance over the three sessions. Partner **Garth Steele** and Manager **Mona Tessier** led the presentations.

The Ottawa tax group has been very busy in 2009 writing papers on key topics of interest to clients and the business community. In total, eight papers were written, posted to the firm's web site, and supported by an advertising campaign. To date, these papers have been downloaded almost 3,600 times. The Ottawa tax group has also been very active at the University of Ottawa Telfer School of Management, where **Rob Meers, Jim McConery, and Don Scott** have been teaching a tax course to first-year business students. Jim McConery and Rob Meers have also participated in the Institute of Chartered Accountants of Ontario (ICAO) ongoing radio series Tuesday Tax Tips on CFRA.

St. Louis, Missouri

Conner Ash P.C. is pleased to announce that **Howard Rosen** recently met with Wendy Nemitz of Ingenuity Marketing to discuss her firm's vision as the new marketing alliance partner for BKR International. As well as Ingenuity being selected for this role, Wendy wrote a blog about Howard, entitled "CPA Cool," which featured Howard and his 1956 T-bird. The article focused on how partners can encourage young professionals to strive to become partners themselves simply by being cool.

Three of Conner Ash's finest, **Alicia Brockland, Andrea Schaefer, and Eric Goettelmann** were featured in a client's print ad. Global Granite imports granite marble

MEMBER NEWS AND NOTES (Continued)



Howard Rosen: CPA Cool

and other building materials, and distributes throughout the Midwest.

On September 17, Howard Rosen presented a program to students of the master's program for Corporate Entrepreneurship at St. Louis University about how the entrepreneurial spirit can help reshape and refocus old line firms. His presentation, "Even A CPA Firm Can Innovate," centered on how you don't need to be with a start-up to be an entrepreneur.

On September 23, Howard also spoke to customers of Midwest Bank Center as part of their Life Line series. Entitled "How to Survive the Recession," the presentation focused on ways to maximize cash flow and minimize the impact of upcoming tax law changes.

Nigel Morton, a recent graduate of Lindenwood University who has been interning over the past year, has accepted a full-time position with the firm as a staff associate in the Business Services Department. This tax season, **Alicia Hodges** and **Alana Weissmueller** from Maryville University, as well as **Leilah Shabazaz** from the University of Missouri St. Louis, will be joining the firm for internships.

In today's economic climate, the team at Conner Ash decided it was truly better to give than to receive. As such, the firm made donations to charities chosen by its clients and associates in lieu of traditional holiday gifts. Checks were distributed to the Alzheimer's Association, American Cancer Society, Habitat for Humanity, Humane Society, Planned Parenthood, Salvation Army, Shriners Hospital, St. Jude's, and United Way, to name a few.

Toronto, Ontario, Canada

Soberman LLP has announced that

some of its brightest professionals appeared in the October/November issue of *Women's Post*. The article featured **Chandor Gauthier**, **Heidi Surkis-Eisen**, **Kristin Matthews**, **Shalewa Iaboni**, and **Soo-Ling Huang**.

The firm has also announced that **Nadine Habbaky**, **Betty Wang**, **Lauriana Mandody**, and

Lorne Rapkin obtained their CA designations. **Adam Scherer** was promoted to tax partner (effective January 2010). A quote from Adam will also appear in the January/February 2010 issue of *The Costco Connection*. **Eisha Sood** graduated from the 2009 Master of Management & Professional Accounting Program (MMPA). **Fei Xue** has obtained her insolvency administration designation.

Paul Rhodes' article on "Home Renovation Tax Credit" was published in the Smart Money section of the November/December issue of *Contractor Advantage*.

Congratulations to Soberman LLP's team working on Chesswood Income Fund's IFRS conversion: Paul Rhodes, **Harpreet Wadehra**, and Lauriana Mandody. The firm also congratulates this year's successful UFE writers: **Cathy Leung**, **Ethan Manes**, **Maria Rivera**, **Lauren Schreiber**, Eisha Sood, **Daniel Whitby**, and **Xin Zhou**.

The firm's Claims Valuation Group participated in the 2nd Annual Accident Benefits Experts Seminar. On October 21, Soberman hosted their 14th Annual Women for Women Group Breakfast. On October 26, **Jeffery Steinberg** attended the Canadian Disability Hall of Fame. On November 24, Jeffrey also attended the Canadian Paralympic Foundation Gala, Inspiration 2010 Beyond.

On November 11, Soberman LLP held its Fourth Annual Town Hall at the Novotel North York Hotel. On November 12, Goldman Sloan Nash & Haber, Ogilvy & Ogilvy, and Soberman LLP presented a client seminar, "Construction and the Current Economic Climate." Paul Rhodes delivered a presentation entitled, "Cash is Still King."

On November 15, **Ari Kashton** attended the Partners for Peace Tribute Dinner, hosted by the Canadian Friends of Haifa University. On November 19, Soberman LLP was a gold sponsor of the Canadian Centre for Diversity's 62nd Awards Gala. **Karen Slezak**, **Sam Kaner**, **Susan Hodgkinson**, **Joel Podbere**, and **Rukshana Dinshaw** attended the event.

On November 22, **Alan Wainer** attended JACS Toronto's 65th Annual Fundraiser Play, Big the Musical, for which Soberman LLP was a silver sponsor. On November 25, Alan Wainer, Lorne Rapkin, Shalewa Iaboni, and Lauriana Mandody attended the Psychology Foundation



Eric Bornstein's entry at The North York Visual Artists (NYVA) Winter Art Show

of Canada's Annual Breakfast. On November 25, **Gary Kopstick**, **Eric Bornstein**, and **Jerry Cukier** attended the Aish Toronto Tribute Dinner. Soberman LLP was a sponsor of the event. On December 2, Jeffrey Steinberg attended the 15th Annual Canadian Investment Awards and Gala. On December 7, Jerry Gaertner attended the Technology Makeover Continues in Networking Event.

From December 1-3, Soberman was a wireless sponsor of the Toronto Real Estate Forum. Paul Rhodes, Sam Kaner, and **Eli Palachi** attended this year's conference.

On December 10, Soberman LLP sponsored the Canadian Hadassah-WIZO (CHW) Dreidel Bash. **Julie Piltz**, **Alice Madolciu**, Lorne Rapkin attended.

On December 5, Eric Bornstein received an honourable mention for a photograph he took in Greece last year at the North York Visual Artists (NYVA) Winter Art Show.

Soberman LLP welcomes Lauren Schreiber, who joins as a staff accountant and will be working in the Advisory and Assurance Division. **Stacy McFarlane** also joins the firm as an audit assistant.



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The role of the BKR International *Worldwide Bulletin* is to enhance communication among members. **All news items for the March/April 2010 issue must be received by Monday, February 8.** Thank you for contributing!