

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

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IN THIS ISSUE:

Chairman's Letter
1, 7

Indian Members Capitalize on Country's Budgets
1, 2, 7

BKR Members Make Accounting Today's 2016 Top Lists
2

Member Profile: ARTUS (Vienna)
3

BKR Middle East Subregional Meeting Held in Dubai
4

Johannesburg Hosts 2016 Africa Subregional Meeting
4

BKR Memorial
5

Niche News
5

EMEA's Britain, Ireland, and Channel Islands Group Meets in London
6

BKR in the Press
6

Member News and Notes
8-11

BKR Meeting/Telemeeting Schedule
12

CHAIRMAN'S LETTER



As yet another busy season comes to an end for many of us across the globe, BKR is poised and ready to launch its annual round of regional meetings, providing members with the perfect opportunity to meet with colleagues and share information and best practices for our mutual success.

First is the Asia-Pacific Regional Meeting, at the Crown Hotel in Perth, Australia, from May 6-9. Next up is Americas, which will be held at the Four Seasons Hotel in Toronto, Ontario, Canada, from May 20-24. And last is the EMEA Regional Meeting at the Marriott Hotel in Vienna, Austria, from June 4-6.

Look for full coverage of our regional meetings in the July/August edition of the Worldwide Bulletin, and copies of the technical presentations and photos will be posted on our website right after each confer-

ence is over.

In addition to their regional conference, EMEA members have been gathering together for various subregional meetings. The Middle East Meeting was held in Dubai on February 29 and graciously hosted by **Kanaan & Associates**. The region's Africa Meeting was hosted by **Boake Incorporated** from March 12-15 in their home city of Johannesburg and, finishing off the series, was the BIC subregional group (Britain, Ireland, and Channel Islands) at the offices of **Blick Rothenberg LLP** in London on March 12. See pages 4 and 6 for more details.

In the U.S., BKR firms are showing that they walk the walk in terms of developing future leaders for their firms. The 19 latest graduates of the BKR Leadership Institute will attend their final session in New York from May 11-13, and a new class is beginning on August 3 in St. Louis. Read more about the upcoming sessions at <http://bkr.com/bkr-event.php?Leadership-Institute---Session-1-441>. All firms worldwide are invited to send their rising stars

Continued on page 7

INDIAN MEMBERS CAPITALIZE ON COUNTRY'S BUDGETS

T.R. Chadha & Co. hosted a very successful event on February 25 at the Gymkhana Club in New Delhi, with approximately 150 people in attendance to discuss the forthcoming 2016 Indian Budget. The presence and strength of BKR was also highlighted to all guests. The firm strongly promoted BKR, advising clients to use the association and its members whenever they need professional services worldwide.

* * * * *

Post the Union Budget 2016 on February 29 in association with the Indian Chamber of Commerce (ICC), **Doshi, Chatterjee, Bagri & Co.** (Kolkata) hosted an interactive session, "Union Budget 2016: Implications for Indian Business," at the Crystal Room

of Taj Bengal Hotel on March 2.

The session was attended by more than 110 delegates from various industries, and included several managing directors, CEOs, and CFOs.

The interactive session was chaired by Mr. A. C. Chakrabortti, former president of the Institute of Chartered Accountants of India (ICAI) and former chairman of Ernst and Young, India.

Mr. Shiv Siddhant Kaul, president of the Indian Chamber of Commerce (ICC), in his welcome speech, gave an overview of the budget and expressed the chamber's views on its possible impact; Mr. Saurabh Bagaria, advocate and an expert in indirect tax, ana-

Continued on page 2

INDIAN MEMBERS CAPITALIZE ON COUNTRY'S BUDGETS

(Continued)



T.R. Chadha & Co. held a very successful event on February 25 at the Gymkhana Club in New Delhi.

Continued from page 1

lyzed the Indirect Tax proposals of the budget; and Mr. **Ajay Kumar Doshi**, managing partner of Doshi, Chatterjee, Bagri & Co., analyzed the key features of the Direct Tax proposals of the Budget.

The session was moderated by Dr. Rajeev Singh, secretary general of the ICC. At the end of the session, there was interaction from the floor, whereby the panelists responded to queries from the floor.

The event was the second joint program organized by Doshi, Chatterjee, Bagri & Co. in association with the ICC in Kolkata and has helped create greater awareness about BKR

and the presence of its member firms in India.

The interaction with the invitees continued after the conclusion of the program over cocktails and dinner.

For more details and photos, visit

<http://www.bkr.com/cmsAdmin/uploads/post-budget-seminar-of-doshi-chatterjee-bagri-&-co-in-kolkata.pdf>.

* * * * *

Rao & Emar, Chartered Accountants (Bangalore) hosted a conclave for the elite members of Peenya Industries Association (PIA), the largest industrial association in south Asia, on March 21.

The conclave was held to educate industrialists on various issues arising from the Indian National and Karnataka State (the capital of which is Bangalore) Budget 2016-17. This conclave also had the objective of promoting BKR in Bangalore.



Managing Partner Ajay Doshi speaks at Doshi, Chatterjee, Bagri & Co.'s interactive session in Kolkata.

The conclave's expert panel included top bureaucrats from the Indian Central and Karnataka State governments, and general managers of public sector banks, financial institutions, and stock exchanges.

The event gathered more than 150 CEOs, CFOs and managing directors of various companies in Peenya Industries Association. Mr. **Paul Pratapkaran**, from BKR's independent member from Chennai, India, **Pratapkar Paul & Co.** and Ms. **Payal Ghosh** from BKR's independent member firm from Ahmedabad, India, **K. C. Mehta & Co. Chartered Accountants**, were also among

Continued on page 7

BKR MEMBERS MAKE ACCOUNTING TODAY'S 2016 TOP LISTS

BKR International is pleased to announce that **Anchin, Block & Anchin LLP** (New York) ranked 39th in *Accounting Today's* annual "Top 100 Firms" list.

Among the "2016 Regional Leaders" rankings, **The LBA Group** (Jacksonville) made the "Top Firms: Gulf Coast" list. Anchin, Block & Anchin LLP made the "Top Firms: Mid-

Atlantic" list. **Gross, Mendelsohn & Associates, P.A.** (Baltimore) placed in "Top Firms: Capital Region." **Ostrow Reisin Berk & Abrams, Ltd. Certified Public Accountants (ORBA)** (Chicago) ranked in "Top Firms: Great Lakes." **Mize Houser & Company P.A.** (Topeka) made the "Top Firms: Midwest" list. **Briggs & Veselka Co.**

(Houston) ranked in the "Top Firms: Southwest" and "Net Engagement Leaders" lists. And last but not least, **Gumbiner Savett Inc.** (Los Angeles) placed in the "Top Firms: West" list. Briggs & Veselka Co., ORBA, and Mize Houser & Company P.A. also made the "Beyond the Top 100: Firms to Watch" list.

Congratulations to our members!

MEMBER PROFILE:

ARTUS (VIENNA)

Who is ARTUS?

ARTUS is an Austrian company specialising in tax consulting, auditing, and management consulting with more than 70 years of experience. Everything began with the foundation of Österreichische Revisions- und Treuhand-Gesellschaft m.b.H in 1945. Since 1999, we have been known as ARTUS.

We are at our clients' disposal for economic affairs and management consulting at three locations: Vienna, Salzburg, and Baden. ARTUS is managed by four partners: **Wolfgang Dibiasi, Wolfgang Schmid, Gerhard Schwab, and Florian Böhm.**

Twice a year, ARTUS organizes senior manager meetings to discuss challenges, such as legal regulations and digitalisation. Furthermore, we organize workshops for our employees, as well as for our clients, on a regular basis. Our current workshop deals with digital competence and provides useful tips for technology-related skills.

The ARTUS congress takes place once every year. Employees from all three locations attend this special meeting, and spend one day together in a beautiful seminar hotel enjoying good food and drinks. We discuss the achievements and happenings of the past year, as well as the things that should be improved in the upcoming years.

ARTUS is highly service- and cooperation-



ARTUS COO Simone Gerner

oriented. Therefore, we provide free support and consulting for the ALUMNI Club of the Vienna University of Economics (WU), as well as sponsoring for the Wiener Konzertverein.

Our Clients

We successfully accompany challenging entrepreneurial projects, such as start-ups with interesting business ideas, provide support with expansions, M&A, restructuring projects, and company handovers. We provide comprehensive advice to SMEs, as well as to large, national, or international family businesses and corporations.

Our comprehensive product range includes:

- Personal consulting and individual support;
- The combination of expert knowledge and many years of experience;
- Up-to-date knowledge on specific topics;
- Close collaboration between our sites;
- Clear communication at eye level;
- Serving as a point of contact for all questions; and
- A great deal of commitment.

Our Services

- Auditing services;
- Tax consulting, including international tax planning and structure, reorganisations and M&A, tax and financial due diligence, foundations and associations, real estate taxation and renting, as well as expansions;
- Accounting, including bookkeeping, payroll, and reporting; and
- Management consulting services including start-ups and company formation, analyses of companies and organisations, and business valuation.



ARTUS Partners Wolfgang Dibiasi, Wolfgang Schmid, Gerhard Schwab, and Florian Böhm

In addition to our own experienced team of experts, we maintain a network of competent partners to help us support your company at all stages of its development.

We have concerned ourselves with the international market, both in professional and in personal terms, and found BKR International to complement us perfectly. We are the exclusive member for Austria since 2012. In 2013, we hosted the Central Eastern European Meeting in Vienna, and we are very proud to host this year's EMEA Regional Meeting, also in Vienna.



ARTUS Senior Manager Hans Baumgartlinger

BKR MIDDLE EAST SUBREGIONAL MEETING HELD IN DUBAI

by Tim Morris (London), EMEA Regional Executive Director

On February 29, 2016, members of BKR International from the Middle East Subregion held their annual subregional meeting. Delegates met in Dubai and represented member firms from Jordan, Lebanon, Iraq, Saudi Arabia, and the United Arab Emirates.

The meeting was hosted by Dubai member firm **Kanaan & Associates**. EMEA Regional Executive Director **Tim Morris** chaired the meeting throughout. Tim started the proceedings with an update on BKR International and the various ongoing initiatives, especially those in the EMEA Region.

Roy Kanaan then provided a very useful presentation on

“Setting Up an Investment Holding Company in UAE,” before Tim briefed the delegates on the

Future Leaders Meeting that BKR’s EMEA Region held in Amsterdam in December 2015.



BKR’s Middle East Subregional members met in Dubai for their 2016 annual meeting.

The afternoon session was a very open debate on “Leveraging the Power of the BKR Association” and how this could be best done in a Middle Eastern context. This engendered a lively discussion and allowed member firms to discuss initiatives that can be taken forward.

The social programme gave members the opportunity to relax and discuss issues on a more informal basis. A big thanks to **Adonis** and Roy Kanaan from our Dubai firm for hosting a successful sub-regional meeting for the Middle East.

JOHANNESBURG HOSTS 2016 AFRICA SUBREGIONAL MEETING

by Tim Morris (London), EMEA Regional Executive Director

The BKR Africa Subregional Meeting took place in South Africa on Monday and Tuesday, March 14-15, 2016. It was hosted by BKR Johannesburg member firm **Boake Incorporated**. Delegates met in Johannesburg. As well as Boake Incorporated, members came from **Logista** (Pretoria), **Adebola Sobanjo & Co** (Abuja), **AUDITEC-FOIRIER CONSULTING** (Douala), and **International Proximity** (Port Louis).

The meetings were held in the Emperors Palace Hotel complex. Before the event, there was the opportunity for the delegates to mix with a variety of trips, including a visit to the Cradle of Humankind at Maropeng and, for the more adven-

turous, a tour through the Sterkfontein Caves, where some of the earliest hominid fossils have been found.

EMEA Regional Executive Director **Tim Morris** chaired the meeting throughout. Tim started the proceedings with an update on BKR International and the various ongoing initiatives, especially those in the EMEA Region. This was followed by a series of presentations

over the two days, which included updates from member firms. Presentations were given by **Claudia Fonseca-Joubert** (Johannesburg) on “Auditors’ Reports” and the “Digital Economy” by **Indileni Nambala** (Johannesburg). A full programme of outside speakers covered topics, including “IFRS,” a regional “Economic Overview,” “Retirement Fund Reform,” “Tax Harmonisation,” “Debt Collection,” “Social Media,” and “Stress Management.”

On Monday evening, there was a dinner in Aurelia’s Restaurant at Emperors Palace, which gave the delegates a chance to relax in an amazingly stylish atmosphere.

A big thanks to **Graeme Boake, Bruce Boake,** and **Donovan Fraser** from Boake Incorporated for organising the meeting.



Members from across Africa gathered in Johannesburg for their 2016 meeting.

WORLDWIDE BULLETIN

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SUBMISSIONS

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

BKR MEMORIAL

A message from **Bob Rothenberg**, senior partner at **Blick Rothenberg LLP**:

"**Colin Lehmann**, a partner in our firm for over 30 years, died on Sunday, 21 February. Whilst we have known that he was terminally ill, his death has come as a shock to many people. He bore his cancer with fortitude and his usual constructive and persistent manner.

"I knew Colin from childhood, and he became a partner in 1985, having commenced what were then called articles (a training con-

tract) with the firm some 10 years or so earlier. His success as a professional was to combine wide ranging expertise and experience with astute commercial awareness to help our clients and those others in the wider community whom he advised to succeed; he was a "go to" individual who never turned away any request for help or assistance. We are all thankful for his friendship and outstanding contribution to both our lives and businesses. He was an exceptional individual and will be missed by all of us."

NICHE NEWS

Affordable Housing

Chair – Karen Kent (Boston)

Real Estate and Construction

Chair – Chris Jones (Phoenix)

The Affordable Housing and Real Estate and Construction Practice Groups held a joint telemeeting on April 19. **Scott Seamands** (San Francisco) presented a session on "New Consolidation and Revenue Recognition Standards: What is the Impact on Audits of Affordable Housing Entities?"

The next Affordable Housing Telemeeting will be held on June 15, at 2:00 p.m. Eastern Time. The next Real Estate and Construction Telemeeting will be held on June 22, at 2:00 p.m. Eastern Time.

Business Valuation

Chair – Tom Giordano (New York)

The Business Valuation Practice Group Teleseminar was held on March 21. Chair Tom Giordano reviewed a presentation entitled, "Quantitative DLOM Models: A Comparison of Outcomes."

The group's next teleseminar will be held on June 13 at 2:00 p.m. Eastern Time.

Future Leaders

Chair – Lisa Matuszny (Cleveland)

The Future Leaders Practice Group held a teleseminar on March 2. Guest Speaker Lisa Tierney, marketing consultant and life strategies coach, presented a session on "Public Speaking and Presentations." Lisa provided tips on how to "pitch" a speaking engagement and help members prepare so that the presentation is a success and provides value to a specific target audience.

The next telemeeting will be held on June 7, at 2:00 p.m. Eastern Time.

Marketing

Chair – Delene Taylor (Louisville)

The Marketing Practice Group held a telemeeting on March 9. Chair Delene Taylor and Raissa Evans, founder and chief strategist at Running Reload, LLC, provided the group with a preview of their presentation, "Cutting Through the Noise: Using Research to Create Relevance," which they will be presenting at the upcoming Association of Accounting Marketing Summit in May.

The next face-to-face meeting of the group will take place on May 3 in New Orleans.

EMEA'S BRITAIN, IRELAND, AND CHANNEL ISLANDS GROUP MEETS IN LONDON

by Tim Morris (London), EMEA Regional Executive Director

The BKR EMEA Region's Britain, Ireland, and Channel Islands Group met for their annual meeting at Blick Rothenberg's premises in Covent Garden, London, on Monday, March 21, 2016, preceded by a group dinner on the evening of Sunday 20 March.

Members from **Blick Rothenberg LLP** (London), **Cassons business**

advisers LLP (Manchester), **Harbinson Mulholland** (Belfast), **Jackson Fox, Chartered Accountants** (Jersey), **Lince Salisbury Limited Avenue Trust Company Limited** (Guernsey), **Ormsby & Rhodes** (Dublin), and **UNW LLP** (Newcastle upon Tyne) all attended.

In addition, the group welcomed **Worldwide Executive Director Maureen Schwartz**, who joined the group for dinner and attended the start of the meeting.

During the meeting, **Roger King**, of new member firm Jackson Fox, was presented with his BKR International certificate and welcomed to the

association by **Bob Rothenberg**, from Blick Rothenberg LLP, and previous Worldwide Chairman of BKR International.

Chairing the event, the EMEA Region's Executive Director, **Tim Morris** (London), commenced the meeting by inviting each firm to provide an update on recent activity within their firms. Roger King then provided an overview on "High Net Worth Immigration to Jersey." The afternoon was spent discussing a diverse range of topics, including "Valuations of Shares for Tax Purposes," "FRS102," "Recruitment Trends" and "Anti-Money Laundering."

The meeting was received very well by those who attended. As always, the meeting gave members an opportunity to discuss development issues within their respective firms, share common interests, latest service offerings, initiatives, and experiences in recent practice matters.

BKR is grateful to Blick Rothenberg LLP for continuing to host these meetings and for their hospitality throughout the day.



BKR's Britain, Ireland, and Channel Islands Group met for their annual meeting in London.

BKR IN THE PRESS

BKR International Executive Director **Maureen Schwartz's** article, "Five Reasons to Formalize Mentoring Programs," was published in *Accounting Today*, available at <http://www.accountingtoday.com/blogs/accounting-tomorrow/news/five-reasons-to-formal->

[ize-mentoring-programs-77319-1.html](http://www.accountingtoday.com/blogs/accounting-tomorrow/news/five-reasons-to-formal-ize-mentoring-programs-77319-1.html) and at <http://bkr.com/cmsAdmin/uploads/five-reasons-to-formalize-mentoring-programs.jpg>.

BKR was featured in *Public Accounting Report's* February 2016 issue. Read the piece at http://bkr.com/cmsAdmin/uploads/par_02-

[16.pdf](#).

Check out Maureen's article, "3 Tips for Accounting Firm Practice Management," at <http://www.cpapracticeadvisor.com/news/12175699/3-tips-for-accounting-firm-practice-management>.

REMINDER!

Submissions for the July/August 2016 issue of the BKR International Worldwide Bulletin are due by Monday, June 6, 2016. Electronic formats are preferred for both text (e-mail, Word, or PDF documents) and photographs (TIF or high resolution JPG attachments).

INDIAN MEMBERS CAPITALIZE ON COUNTRY'S BUDGETS

(Continued)

Continued from page 2
the attendees.

The event was also attended by journalists from Indian national newspapers like *The Indian Express, Deccan Herald, The Hindu, and PTI*.

The conclave kicked off with a welcoming of the members of PIA, and a presentation on the highlights of the union and Karnataka state budget by the Rao & Emmar team.

The event included two panel discussions, with the first panel's discussion being on Taxation-related issues and the second being the role of Banks and Financial Institutions in the Growth of Micro, Small and Medium Companies.

The president of PIA addressed the gathering and thanked BKR for organising the event, and also mentioned that it was a first of its kind for the members of PIA.

The first panel included top officials from tax departments and officials who are involved in the drafting of one of the most awaited laws,

GST (goods and service tax), which is expected to revolutionize the system of indirect taxes in India. Sufficient time was allotted to question and answer sessions between audience members and the expert panellists.

The second panel discussion focused on how banks, financial institutions, and stock exchanges can fuel the growth of the MSME sector in India.

The panellists discussed many innovative schemes of their respective institutions. The core issue of raising "non-performing assets" in the Indian banking system was also discussed.

The ses-

sion was concluded with a vote of thanks by Mr. D.T. Venkatesh, who thanked BKR International for conducting such an event and encouraged them to conduct such events regularly.

For complete details and press coverage, visit <http://bkr.com/cmsAdmin/uploads/bkr-conclave-in-bangalore.pdf>.



Rao & Emmar, Chartered Accountants Partner B J Praveen addresses the panel in Bangalore.

CHAIRMAN'S LETTER

(Continued)

Continued from page 1

– I guarantee they will return to you with the skills and knowledge necessary to help you run a more successful firm in today's complex environment.

In February and March, much press was garnered for BKR by three of our Indian firms, **Doshi, Chatterjee, Bagri & Co.** (Kolkata), **T.R. Chadha & Co LLP** (Mumbai), and **Rao & Emmar, Chartered Accountants** (Bangalore), each of which held conferences, panels, and receptions focused on the 2016 Union Budget of India, the country's annual financial statement. Many thanks to each for their assistance in expand-

ing the BKR name and message at these important conclaves, which were attended by dignitaries, CEOs, and other high-level executives throughout India.

And, the best is yet to come! It is not too early to begin making plans for BKR's event of the year, our 2016 Annual Worldwide Meeting at The Ritz-Carlton Hotel in Santiago, Chile, from November 12-15.

Remember, each firm gets one free registration, including all sessions and social events. Be sure to check the BKR website on a regular basis for updated information on the meeting, social events, and pre- and post-meeting tours, which you can book right now.

From mysterious Machu Picchu and the Sacred Valley, to the strange and wonderful creatures of the Galapagos Islands, Santiago is the ideal starting point for any South American adventure.

I hope that everyone to whom it applies had a productive and successful busy season, and I look forward to seeing you all in Perth, Toronto, and Vienna.

Regards,

Howard Rosen

MEMBER NEWS AND NOTES

Ahmedabad, India

K. C. Mehta & Co. Chartered Accountants has produced an analysis of the 2016 India Budget. Download the documents at <http://kcmehta.com/#/Home>.

Boston, Massachusetts, USA

Kevin P. Martin & Associates, P.C. is proud to announce that **Andrews Chan** has earned his Certified Professional Accountant designation. Andrews joined KPM in January 2015 as a junior accountant. Prior to joining KPM, Andrews was with JP Morgan Chase & Co.'s Global Fund Services for six years and has expertise in simple and complex investment products, as well as hedge fund operations. He earned his bachelor's degree in accounting from the University of Massachusetts Boston.

KPM is pleased to announce the opening of its new office at 50 Milk Street, Boston, Massachusetts. The firm is also excited to announce the launch of its new website at <http://www.kpm-us.com>.

Cincinnati, Ohio, USA

Rudler PSC is pleased to welcome new team member **Tammi Riddell**, who has joined the firm as a staff accountant. Tammi's public accounting experience includes accounting, tax, and management advisory services for a wide variety of business owners, individuals, and families, as well as not-for-profit organizations. As a QuickBooks ProAdvisor, she is skilled in monthly, quarterly, and annual compilations.



Tammi Riddell

The firm would like to congratulate staff accountant, **Samuel Brown, CPA**. Sam has completed the certified public accountant exam and experience requirements, and has been awarded the CPA designation. Sam has public



Sam Brown

accounting experience in auditing, accounting, and tax services and will continue to specialize in business and individual tax as well as auditing services for not-for-profit organizations, governmental agencies, and employee benefit plans.

Rudler PSC invites everyone to support its First Annual Charity Golf Outing benefiting the Northern Kentucky Education Council on Friday, July 22. The Northern Kentucky Education Council convenes leaders and aligns education initiatives, birth to career, across six counties in Northern Kentucky. Contact Laura at rudlerpscgolf@gmail.com, 859-331-1717, or visit <http://www.rudler.com> for more information.

Chennai, India

Pratapkar Paul & Co. is proud to announce that **Vishwanath Yabaka** has been ranked 34th on the Merit List for the Final Examination of the Institute of Chartered Accountants of India (ICAI). Vishwanath had earlier secured the 32nd position for the Inter Examination of the Institute.



Vishwanath Yabaka

Bogota, Colombia

BKF International's Maria del Mar Montes interviewed IASB Chairman Hans Hoogervorst for the latest edition of its magazine, *El Indicador*. During the interview, Hoogervorst noted that "we are very close to having a truly global standard," referring to the application of international reporting standards. Regarding the problems of this process, he said, "Language is a problem. It is very difficult to translate the standards that are originally written in English, but certainly the benefits are important. Mainly, to have financial reporting that is recognized throughout the world...helps a lot in the international investment climate, and I believe that, in this way, contributes to the growth of the world



Hans Hoogervorst, IASB chairman, and Maria del Mar Montes, BKF journalist.

economy." With respect to the date that the process is expected to be completed, Hoogervorst said, "I cannot say, but we have come a long way compared to 10 years ago."

Kolkata, India

Doshi, Chatterjee, Bagri & Co. has produced an analysis of the 2016 Union Budget of India. Download the document at <http://bkr.com/cmsAdmin/uploads/india-union-budget-2016-17.pdf>.

Ajay Doshi has released a proposed Indian Base Erosion and Profit Shifting (BEPS) Action Plan. For more information, visit [http://www.bkrasiapac.com/News/Latest-News/Indian-Base-Erosion-and-Proft-Shifting\(BEPS\)-actio.aspx](http://www.bkrasiapac.com/News/Latest-News/Indian-Base-Erosion-and-Proft-Shifting(BEPS)-actio.aspx).

London, United Kingdom

On March 16, the Budget 2016 was presented to Parliament by the Chancellor of the Exchequer. Copies of our Private and Corporate Budget commentaries and the latest TaxFax can be found at <http://www.blickrothenberg.com/BR-News/Budget-2016>, along with the Tax Calculator and our Tax Calendar. On the day, **Blick Rothenberg LLP** partners visited the offices of national newspapers and broadcasters, including the *Financial Times*, *The Telegraph*, and *ITV News*, in order to provide immediate commentary. The firm received excellent national press coverage following the announcement (over 50 pieces). The Tax

Continued on page 9

MEMBER NEWS AND NOTES

(Continued)

Continued from page 8

Calculator was used by a number of external media outlets and has now had over 3.2 million hits, with more than 260,000 unique visitors. The firm also hosted a live webinar for clients, intermediaries, and BKR members. Listen to the recording at <http://www.blickrothenberg.com/BR-News/Budget-2016>.

Long Island, New York, USA

Albrecht, Viggiano, Zureck & Co., P.C. (AVZ) is pleased to announce The Stephen A. Antaki Memorial Golf Classic, which will be held on June 20 at the Bellport Country Club in Bellport, New York. Proceeds from the event will be donated to the family of Partner **Stephen Antaki**, who passed away earlier this year. For golf reservations or to reserve your sponsorship, please contact **Irene Howell** at ihowell@avz.com or call her at 631-434-9500.

Los Angeles, California, USA

Gumbiner Savett Inc. is pleased to announce the promotion of three employees. **Janna Kantsyрева**, CPA, MBT was promoted to senior tax manager, while **Vaibhav Tandon**, CPA, and **Elizabeth Rhee** were both promoted to audit manager.

Janna Kantsyрева, CPA, MBT is a specialist in income tax planning, corporate taxes, part-

nerships, and taxes for high net worth individuals. Janna's business clients include real estate, manufacturing, and professional service organizations. Janna advises clients year-round and assists with tax planning strategies, as well as yearly compliance. Janna has been with Gumbiner Savett for almost eight years.

Vaibhav Tandon, CPA, is an audit and assurance practitioner. Vaibhav has extensive experience working with non-profits and non-profit real estate developers, pension plans, and privately held companies in the retail distribution, wholesale, consumer finance, and manufacturing industries. He has been with Gumbiner Savett for almost six years.

Elizabeth Rhee, an audit and accounting specialist, has extensive experience working with both publicly and privately held companies in manufacturing, distribution, entertainment, real estate, government contracting, and information technology. She also has significant experience working with not-for-profit organizations. Elizabeth has been with Gumbiner Savett for four years.

Luanda, Angola

Carlos Pinho, from **ACE – Auditangol Consulting Enterprise, Lda.** (Luanda), was quoted in *The Accountant* article, "Angola's Accountancy Profession Heralds Expected Tough Emergence," on March 29. Read the piece in full at <http://www.theaccountant-online.com/news/angolas-accountancy-profession-heralds-expected-tough-emergence-4850500>.

New York, New York, USA

The results are in, and **Anchin, Block & Anchin LLP** has won the Best Accounting Firm for an unprecedented sixth year in a row in the annual Hedgeweek Awards. This comes after winning the AI Best Hedge Fund Accountants award for the fourth year in a row. Anchin could not continue to win these awards if it wasn't for the commitment and dedication of everyone at the firm, and special thanks to the dedicated members of the FS group. More

details can be found at http://www.anchin.com/admin/Upload/News/1469News_03092016_Award_Hedgeweek.pdf.

The firm is also pleased to announce that for the ninth consecutive year, it has been named one of the Best Companies to Work for in New York State for 2016. The program, which is run by the New York State Society for Human Resource Management (NYS-SHRM), acknowledges leading companies throughout New York State.

Yair Holtzman, Practice Leader of Anchin's Research & Development Tax Credits and Incentives Group, authored an article entitled, "Improving Packaging Design ROI by Taking Advantage of the R&D Tax Credit," published in the *Bloomberg BNA Daily Tax Report*.

Greg Wank, Practice Leader of Anchin's Food & Beverage Group, authored an article entitled, "Dealing with New York City's Harsh Rental Reality," published in *Modern Restaurant Management*.

Omaha, Nebraska, USA

Bland & Associates has announced a new director. **Bob Dick** brings with him over 27 years of public accounting experience working with individuals and closely-held businesses. As an owner of a CPA firm for 18 years, the services Bob provided to clients included financial statement and tax return preparation, consulting, and business valuations. In addition to the traditional CPA services, Bob is a certified valuation analyst (CVA), which is a certification for business valuations. Bob's focus is



Yair Holtzman



Greg Wank



Bob Dick

Continued on page 10

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

MEMBER NEWS AND NOTES

(Continued)

Continued from page 9

to provide services that improve operations and profitability to closely held businesses and not-for-profit organizations, including the health care industry.

The firm is holding a charity golf event for Angels Among Us, a non-profit organization that assists families who have children with cancer. Taking care of a child with cancer is tough, and having just that little extra support goes a really long way. The money raised at events like this will go directly to these families, which helps them stay afloat through a very trying time. The more money that is raised, the more families Angels is able to help. Sign up at <http://blandcares.org/2016-angels-among-us-golf-outing-set-for-may-26th>.

Paris, France

On March 29, **Exponens** was at the Sorbonne in Paris to meet the Master Audit CCA students of La Sorbonne. After a presentation by Exponens group, Partners **Nathalie Lutz** and **Thierry Legrand**, and Richard Khamsy, a former student of La Sorbonne who became a collaborator with Exponens, received nearly 35 students for an interview. Some of the most interesting profiles have already been contacted again for further interviews.

This annual event is an illustration of the strong relationship that has united La Sorbonne and Exponens for several years. Many students from this prestigious school saw their internship in Exponens turn into a permanent contract.



Exponens met with Master Audit CCA students of La Sorbonne on March 29.

Similarly, on the occasion of the Annual Worldwide Meeting of BKR International, two students of La Sorbonne were given a Scholarship Award for the EMEA Region, which rewards the best students in the world.

Paris, France

SFC Group recently held its Finance Law 2016 conference in Paris and Lyon. There were about 400 customers in Lyon on January 25th and 120 in Paris on February 1st who attended the firm's conferences on Finance Law. Bruno Bonnell (a very famous French business manager and legend in the video game industry) in Lyon and Catherine Maunoury (several-time world champion of air acrobatics, and director of the French Museum of Air and Space) in Paris presented on such topics as "The Impact of New Technologies on the Organization of Companies" and "How to Manage Risks to Reach Goals."

On February 12, SFC Group published the fourth issue of its newsletter, *The Entrepreneur, Current Events of the Business Manager*, and sent it to 4,000 customers and



SFC Group organized its first evening dedicated to managers and technicians on February 16.

1,000 journalists. The contents included: What Tax Regime to Choose as a SCI?; Law Hardness, Are You Concerned?; Protect the Company, the Mandates of Future Protection in Posthumous Effect; and Employees, to Work More for...? The Same Supplementary Pension!

In partnership with the AFPA and CIEFA, the human resources team of SFC Group organized its first evening dedicated to man-

agers and technicians on February 16. Watch the video at <https://www.youtube.com/watch?v=ewkWzM84a0c>.

The firm also organized a special evening for winemakers. Partner **Nicolas Fritsch** of the firm's Villefranche office presented "The Subsidies and Aid for Winegrowers" and "The Transmission of Vineyards." Watch the video at https://www.youtube.com/watch?v=o_nN87F90ck.

Philadelphia, Pennsylvania, USA Region,

St. Clair CPA Solutions was ranked #12 on the list of 2016 Delaware Valley Top Workplaces winners published on March 20, 2016, by Philly.com, which includes the *Philadelphia Inquirer* and *Daily News*. This is the fifth consecutive year that St. Clair CPA Solutions has been awarded Top Workplace, based solely on the results of an employee feedback survey administered by WorkplaceDynamics, LLC, a leading research firm that specializes in organizational health and workplace improvement. Workplace Dynamics reported that an unprecedented 2,260 companies applied for the 2016 award, but only 100 companies were selected as Top Workplaces. Several aspects of workplace culture were measured, including Alignment, Execution, Connection, and more.



Stephanie Sommers, Human Resources Manager for St. Clair CPA Solutions, accepts the Philly.com 2016 Top Workplaces award from Philadelphia Media Network Publisher Terrance C.Z. "Terry" Egger, presented during the Top Workplaces ceremony held March 16 at Vie restaurant in Philadelphia, Pennsylvania.

Continued on page 11

MEMBER NEWS AND NOTES

(Continued)

Continued from page 10

St. Clair CPA Solutions was also again named to the *Philadelphia Business Journal* List of Top 25 Accounting Firms, where it has continuously maintained a position for 17 years. The *Philadelphia Business Journal* annually compiles "The List" based on metrics, including a firm's number of total local employees and number of local offices. St. Clair CPA Solutions employs approximately 75 people at its two offices in Merchantville, New Jersey, and Conshohocken, Pennsylvania.

Phoenix, Arizona, USA

Schmidt Westergard & Company, PLLC is proud to announce that **Christopher Jones** is now a member of its partner team. In addition, **Kelly White** and **Daniel Evans** have been promoted to director positions.

Chris Jones has served Schmidt Westergard clients for over 12 years. Chris is active on boards and committees of various organizations in the valley. He serves a wide variety of industries and specializes in healthcare, construction, real estate, railroads, services, and not-for-profits.

Kelly White has over 13 years of experience, and joined Schmidt Westergard in 2007. She is a board member of the East Valley Estate Planning Council and currently serves as Secretary. She focuses on tax consulting and compliance for high-net-worth individuals and their related entities, including estate and gift tax planning, as well as compliance related to tax-exempt organizations and fiduciary taxation.

Dan Evans joined Schmidt Westergard in 1999 and has been in the industry for over 17 years. Dan is exceptionally accomplished in employee benefit plans for a wide range of busi-



Chris Jones



Dan Evans

nesses and currently serves as Phoenix Chapter President of the Western Pension & Benefits Council.

Rio de Janeiro, Brazil

Lopes, Machado Auditores is pleased to announce that it is now registered with the Canadian Public Accountability Board (CPAB).

Sydney, Australia

Walker Wayland - Sydney is pleased to announce the appointment of **Wali Aziz**, **Ian Hillsdon**, and **Cameron Stone** as principals of the firm as of 1 January 2016 and congratulates them on their appointment to the Senior Executive Team.

Walker Wayland - Sydney aims to offer opportunities to its team in support of their future prospects and in continuing to improve the scope of services the firm can offer to its clients. These new roles provide experienced and skilled managers to advance, and provide further value and quality to our practice.

The firm welcomes the opportunity for clients and contacts to



Wali Aziz



Ian Hillsdon

engage with the new principals. These appointments align with the firm's business and cultural values, and its commitment to delivering exceptional client service standards at a local, national, and international level.



Cameron Stone

Vancouver, British Columbia, Canada

Lohn Caulder LLP recently hosted three successful events for professional organizations. **Jason Nakano** presented on the topic of 2016 Federal Canadian Budget, "The Trudeau Effect," to the University of British Columbia Medical Students and the Professional Association of Residents of British Columbia.

The firm also provided a tax clinic at these events and prepared over 100 complimentary personal income tax returns for the residents and students.

Kelly Lohn and **Scott Larson** presented a webinar for the Association of Professional Engineers and Geoscientists of British Columbia on "Business Tax and Wealth Strategies." This webinar qualified as eligible continuing education hours for the association's members.

The firm is also very excited to announce the launch of its newly designed website. Check it out at <http://www.lohncaulder.com>.

ARE YOU ON BKR'S E-UPDATE LISTS?

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

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

BKR MEETING/TELEMEETING SCHEDULE 2016

May 3	Marketing Practice Group Meeting The Roosevelt Hotel New Orleans, Louisiana, USA
May 3	Assurance Services Practice Group Telemeeting [3:00 PM ET]
May 4	Technology (Internal) Practice Group Telemeeting*
May 5	International Tax (Americas) Committee Telemeeting*
May 6-9	ASIA-PACIFIC REGIONAL MEETING Crown Hotel Perth, Australia
May 9	Forensic Accounting/Litigation Support Practice Group Teleseminar*
May 10	Canadian Tax Practice Group Telemeeting*
May 10	Retirement Plan Auditors Practice Group Dinner Meeting <i>Held in conjunction with the AICPA Employee Benefit Plans Conference</i> Las Vegas, Nevada, USA
May 11-13	BKR Leadership Institute Graduation Program Doubletree Metropolitan Hotel New York, New York, USA
May 20 May 20-24	Governmental/Not-for-Profit Accounting and Auditing Practice Group Meeting AMERICAS REGIONAL MEETING Four Seasons Hotel Toronto, Ontario, Canada
June 4-6	EMEA REGIONAL MEETING Marriott Hotel Vienna, Austria
June 7	Future Leaders Practice Group Telemeeting*
June 13	Business Valuation Practice Group Teleseminar*
June 15	Affordable Housing Practice Group Telemeeting*
June 21	Human Resources Practice Group Telemeeting*
June 22	Real Estate/Construction Practice Group Telemeeting*
July 11	U.S. Tax Practice Group Telemeeting*
July 12	Business Development Practice Group Telemeeting*
July 19	Firm Administrators Practice Group Telemeeting*
August 3-5	Leadership Institute - Session 1 Hilton St. Louis at the Park St. Louis, Missouri, USA
October 28	U.S. Tax Practice Group Meeting Chicago, Illinois, USA
November 2-4	Leadership Institute - Session 2 Embassy Suites Chicago Downtown Chicago, Illinois, USA
November 12-15	ANNUAL WORLDWIDE MEETING The Ritz-Carlton Santiago, Chile
November 28	EMEA Region Tax Meeting Amsterdam, The Netherlands
November 29	EMEA Region Future Leaders Meeting Amsterdam, The Netherlands
December 5	Managing Partner Roundtable Meetings Hyatt Regency Orlando Airport Orlando, Florida, USA

2017

May 5-8	JOINT ASIA-PACIFIC/EMEA REGIONAL MEETING Mandarin Orchard Hotel Singapore, Singapore
June 2-6	AMERICAS REGIONAL MEETING The Brown Hotel Louisville, Kentucky, USA
October 21-24	ANNUAL WORLDWIDE MEETING InterContinental London Park Lane London, United Kingdom

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