



# ADVANCING the PROFESSION for 100 YEARS!

MEMBER NEWSLETTER, VOLUME 7, No. 3 :: SUMMER 2024



## Emphasizing people and connections for more than a century

Summer in Maine! This splendid season offers the opportunity to slow down and reconnect with friends, family – and perhaps even ourselves.

In our high-speed, tech-driven world, it's refreshing to be reminded of and embrace our *humanity*. It is people, after all, who make or break deals, influence hiring decisions, inspire colleagues, enhance a team's effectiveness,

### EXECUTIVE DIRECTOR NOTE

and become leaders.

For 100 years, the MECPA has been about people, serving as a catalyst for valuable connections and professional growth. We love helping people succeed and thrive. We accomplish this by providing quick, individualized responses, solutions and opportunities; advocating for

accountants in Augusta and Washington, D.C.; actively working to raise awareness, vibrancy and sustainability of the profession; and much more.

We truly appreciate you, your membership and the investment in people that it enables. Enjoy Maine's sweetest season and be sure to find time for some fun and relaxation!

– Executive Director Trish Brigham

## New MECPA mentor program designed to build essential ties

"We all need a little help sometimes!" Providing support and encouragement for accounting students as they navigate their college experience and prepare for the CPA Exam is a great way expand the talent pool.

The MECPA will launch a new mentor program this fall, matching working professionals with

student members, providing the personal connection that's been proven to be a critical factor in deciding to pursue a career in accounting.

More information will be coming soon, including a brief application form for mentors and mentees. Interested in becoming a mentor? [Contact Trish Brigham](#). [And go here FMI](#).

### MILESTONE 100th ANNUAL MEETING A HIT



Former AICPA Chair Ernie Almonte, left, with MECPA Executive Director Trish Brigham and outgoing Board President David Stone, was the keynote speaker for our 100th Annual Meeting in May. In his highly engaging way, Almonte gave useful insights on effective leadership and mentoring programs and congratulated us on our successful 100-year history!

### COMING UP

For a full list of programs, [visit mecpa.org](#). Members typically enjoy discounts.

#### Aug. 13

- **CFO Series: Advanced Profit Enhancements.** 8 CPE. [Register](#).
- **How AI & Automation Impact Management Accounting,** 1 CPE. [Register](#).

#### Aug. 26

**Ethical Accounting Practices & Decision-making in the AI Era.** 2 CPE [Register](#).

#### Sept. 18

**Maine Revenue Services Tax Symposium.** 8.5 CPE. [Register](#).

#### Oct. 4

**Demystifying the Offshore Talent Recruitment Process.** 1 CPE. [Register](#).

#### Oct. 17

**Estate & Financial Planning for Gen X and Y.** 8 CPE. [Register](#).

– See CALENDAR, page 6

This newsletter is an MECPA [benefit](#). **THANK YOU** if you've renewed your membership for 2024-25. If you haven't yet, please do so!

## MEMBER NEWS

## Thank you to people and sponsors who make a real difference

*"Great leaders don't set out to be a leader, they set out to make a difference."* – Lisa Haisha, life coach

Thank you to the following MECPA members for their volunteerism and leadership. They are wonderful ambassadors for their firms and the professions:

- Blake Potter, Carter Lambert, Thomas MacGregor and Nathan Perry of Wipfli, Classroom Speakers & St. Josephs College Business Panelists



- Joshua Callnan and Cory Vargo of Wipfli, MECPA Form 990 Filing

- David Stone of BerryDunn, Micah Davis-Johnson of Aries Wealth Management, and the Dufour Tax team, student liaisons.

- NBT Bank for its continued sponsorship. Please consider supporting our sponsors, like NBT, that contribute to the health of the MECPA and the Maine business community!

- KPMG, LLP, for its continued sponsorship of pipeline and advocacy efforts!

New volunteers and sponsors are always welcome. [Contact Trish Brigham.](#)

## BEYOND THE NUMBERS: MATTHEW PORE

## 'Do first things first' stuck because it keeps priorities straight

**Name:** Matthew Pore

**Employer:** Albin Randall & Bennett (ARB)

**Title:** Tax Partner, Tax Department Lead

**How long in this profession:** I have been very active in the profession since I graduated college about 22 years ago.

**How long as an MECPA member:** I'm not certain, but I suspect I've been a member of MECPA my entire career.

**How has being a member helped you or allowed you to help someone else?**

Most recently, during this past busy season, the MECPA has provided support and advocacy in a collaborative effort to get MRS to respond about conforming to late filing relief. Trish Brigham and I worked together to get a response from MRS to determine if they were going to conform with Maine Disaster Relief that was issued on April 4. Having the filing and payment deadline moved to July 15 was very beneficial for many clients.

Also, the MECPA has provided a platform to discuss with MRS a significant filing issue with a major tax software vendor used by many of the firms in Maine. I've taken a solutions-based approach to determine what the barriers are between the software vendor and MRS so that we can timely file tax returns earlier in the upcoming 2025 filing season. I will be monitoring in a collaborative way to ensure that each party will be accountable for deadline schema testing, with the target deadline to be done by January 29,



*Matt Pore enjoys quality time on the golf course with his daughter.*

to e-file a tax returns on Sunday, Feb. 2, 2025. More to come!

**Volunteer organization you're involved in, and what you enjoy about it:**

I've been a longtime supporter of the United Way and other charitable organizations that benefit children and animals. In the past, I've donated my time to the Education Foundation of the Kennebunks and Arundel and the Maine Golf Foundation.

**Best advice you've received?**

I've had a few great mentors and teachers during my career and there are a couple of phrases that I learned and say often. In regard to our profession: "the business model is simple ... go get a good client, do really good work, and then send them a bill."

I have really embraced this concept, and I get to work with some really fantastic clients. The second phrase that I live by is: "do first things first." This helps me prioritize my roles and responsibilities, either being a very active father or continuing to help build ARB for continued success.

**What do you do in your free time?**

This is an easy question for me, I spend time with family or play golf. The win-win is when I take my daughter golfing with me. Her favorite aspects of playing golf are riding in the cart, running up and down fairways, and buying candy bars from the food and beverage cart (not so much golf). It's the best quality time we spend together.

**Favorite vacation spot:**

There are some great spots that I enjoy visiting in Maine every summer such as Bar Harbor, but for the family, we always enjoy the "Disney" trips. We are Disney Vacation Club members and plan a trip most years. We find ourselves spending less time at the Parks each year and more time relaxing at the resorts and enjoying the amenities and fine dining.

## BOARD PRESIDENT LETTER

## Belik: Reaching students at a younger age is key

I hope this finds you all enjoying the summer season in a way that is meaningful to you! I want to take some space to introduce myself as I step into the role of your new MECPA Board President. I might not be the person that you'd expect to see at the helm, as I must confess that I am a practicing attorney. Go ahead with the lawyer jokes, I can handle it!



*Barbara Belik*

I was asked to become more involved with the MECPA in recent years because I've spent over 25 years teaching both full-time and part-time in undergraduate and graduate accounting programs. And with that teaching experience comes firsthand knowledge of the challenges we face expanding the pipeline to the accounting profession.

While accounting faculty continually strive to convey the exciting opportunities offered by the accounting major to undecided undergraduates, it has become evident that the pipeline expansion needs to take place much earlier in the educational process.

Thanks in large part to the work of our Executive Director, the MECPA is constantly exploring new conduits to attract students to the accounting profession. Through partnerships with local high schools, Junior Achievement and most recently St. Joseph's College, the MECPA is reaching out to high school students across the state and connecting them to accounting professionals who can put a face to the profession.

When the MECPA puts a call out for volunteers for outreach events to high school and college students, please consider volunteering your time. As our most recent MECPA President David Stone has conveyed many times, small actions can yield big results. Your interaction with just one student could directly result in another member joining the accounting profession. I guarantee that both you and that student will walk away from the experience feeling energized.

We all get caught up in the day-to-day demands of our careers but when working with students, we are reminded of just how dynamic and rewarding this profession can be!

I look forward to working with you all over the next year. Please reach out any time – I'd love to hear from you!

– Barbara Belik  
bbelik@bergenparkinson.com



*Some of the 2024-25 MECPA Board Members before this year's Annual Meeting in May, from left: Kirin Schrum, David Stone, Heather Perreault, Jake Black, Tami Gower and Ryan Curry. – Patricia McCarthy photo*

## Meet your 2024-25 Board members

The Board of Governors for 2024-25 was approved at the May 17 Annual Meeting, and includes:

President: **Barbara Belik**, CPA, MBA, J.D., attorney, Bergen Parkinson

Treasurer: **Spencer Hathaway**, CPA, Senior Audit Manager, Baker Newman Noyes

Secretary: **Heather Perreault**, CPA, Finance Director, town of Falmouth

**Dave Barrett**, CPA, Professor, University of Maine

**Jake Black**, CPA, Audit Senior, BerryDunn

**Micah Davis-Johnson**, CPA, CFA,

Director/Wealth Advisor, Aries Wealth Management

**Tami Gower**, CPA, MBA, Professor, University of New England

**Sam Hornblower**, CPA, Tax Manager, Dufour Tax

**Mike Santo**, CPA, Senior Tax Manager, Wipfli

**Kirin Schrum**, CPA, Tax Manager, Purdy Powers

**Ken Stewart**, Senior VP, M&T Bank

AICPA Liaison: **David Stone**, CPA, MBA, CFE, Senior Manager, BerryDunn

Student Representative: **Riley Andrews**, University of Maine

**Hiring? Searching for a new job?  
Joining a Board?**



**Check out  
the MECPA Career  
& Volunteer Listing  
on [our home page](#).  
Members can post  
for FREE!**

## MEMBER NEWS



Micah  
Davis-Johnson



Shehzi  
Ansari



Kirin  
Schrum



Kirsten  
Lebreux

## Why accounting? What do you like about your work?

Summer Shake-up! Instead of our usual one-on-one ListenUp! conversation with an MECPA member, we took advantage of having lots of interesting members to speak with during a June Social Hour at Bayside Bowl in Portland.

We asked several accountants what they enjoy about their jobs and are excited to include answers from four of them here:

**Micah Davis Johnson**, Director/Wealth Advisor, Aries Wealth Management: "I like the combination of finding analytical solutions and the people, the relationship aspect. And I like that every day is different."

**Shehzad 'Shehzi' Ansari**, Senior Tax Manager, 3Degrees: "The thing I like the most about my job right now is that I'm helping people solve problems that are keeping them from doing their jobs. I like solving puzzles in tailored ways for people's diverse goals."

**Kirin Schrum**, Tax Manager, Purdy Powers: "People are often afraid of what they don't understand. I like helping people and explaining things in a way that makes sense to them. I like that human-to-human connection."

**Kirsten Lebreux**, Tax Senior, Baker Newman Noyes: "The work is challenging and also rewarding. I like the close financial relationships with clients."

Thank you to event sponsor [Taro Health](#), a vibrant new player in Maine's health insurance market.

## Newest Board member is not a CPA, and that's intentional

Introducing the newest MECPA Board Member, Ken Stewart, a senior vice president at M&T Bank. He's a ground-breaker as the first non-CPA on the Governor's Board.

The Board voted to allow non-CPAs to serve in response to changes in our profession. Bringing in people from other finance fields allows for new perspectives and expansion of networks and community.

A little about Stewart:

**How did you get into banking?**

**How do you work with accountants?** I have actually been in banking since I graduated college. I have always enjoyed getting to know my clients and our local business community, Accountants have historically been some of my best contacts and Centers of Influence. We just partner well together.

**Most recent book read?** I read quite a bit The Bible daily. My leadership team and I are currently reading "Extreme Own-



Ken Stewart

ership." Our Senior team just finished "The Five Dysfunctions of a Team." At night, I'm also currently reading two books: "The Amazonian" – think Indian Jones and "Murder in the Caribbean," a British mystery series.

**Hobby/past time?**

Mountain biking, trail running, mountaineering, hiking with my 2-year-old son. My family also enjoys listening to live music so we do that whenever we can, and also exploring all the fun small towns and events in Maine.

**Goal for upcoming year on the Board?** I look forward to getting to know my fellow members, learning the unique challenges that face our local CPA professionals and organization and how I can use my expertise to help drive awareness and recognition for the organization and its members, continue to foster a partnership with the organization, its members and M&T Bank.

## And ... presenting our new student rep

This is the third year the MECPA Board has incorporated student voice and perspective in its decision-making. We look forward to Riley Andrews' participation as she builds on the success of her predecessors.

Andrews will earn her degree in accounting from the University of Maine in December and her MBA in December 2025. She serves as president of the Accounting Club and Buddy Coordinator for the university's Best Buddies program. She recently completed an internship at BerryDunn



Riley Andrews

in Bangor. Outside of work, she enjoys outdoor activities and traveling.

"By serving in this position, I hope to learn many things. The first would be industry knowledge," Andrews said.

"While school teaches fundamentals, this will give me a chance

to learn firsthand about the public accounting industry as well as the new developments. I also hope to learn ways to connect and engage with my community after my academic days are over, through other pathways besides school organizations."



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## Our winning streak's intact!



The MECPA winning streak, athletically and professionally speaking, continues! On a beautiful June evening, the accountants beat players from M&T Bank on the softball field. Laughs enjoyed, runs scored, relationships forged – success!

## Join an MECPA committee: Light lift, with a big impact

The MECPA streamlined its committee structure several years ago in an effort to improve the volunteer experience for busy professionals and the effectiveness of committee work. If you're interested in learning more or getting involved with any of the following committees, [contact Trish Brigham](#).

### Difference Makers Committee

Plan events, programs and volunteer opportunities for social networking and leadership development for new and rising professionals.

### Innovation & CPE Committee

Research new and innovative ways the MECPA can provide value to members and firms. Discuss hot/trending topics and provide insights on the professional development environment.

### Pipeline Committee

Recruit new members and ensure that membership is a rewarding experience. Promote and raise awareness of the accounting profession through various ongoing outreach efforts.

### Tax & Advocacy Committee

Discuss issues and build relationships with legislators and regulators. Monitor legislative landscape and provide expert perspective and testimony to the Legislature and the press.

# Some practical advice for dealing with talent shortages

The National Pipeline Advisory Group (NPAG) has conducted extensive research and held numerous discussions with a variety of stakeholders as it develops a data-driven, comprehensive plan to address talent shortages in the profession. Their recommendations include:

- Address the time and cost of education.
- Make the academic experience more engaging.
- Enhance employee experiences by evolving business models and cultures.
- Prioritize strategies expanding access to underrepresented.
- Grow support for CPA Exam candidates.
- Tell a more compelling story.

Read the final NPAG Report, and sign the Pipeline Pledge [here](#).

Collectively, we all have a part to play in implementation; on an individual level, the last step is a great starting point. Talk about the accounting profession and your career path with students and new and prospective employees in an enthusias-



tic and engaging way. Not sure how to become a great storyteller?

Here are a few tips from Tim Brigham, an associate director with OMD Agency, a global marketing firm, for adapting the storytelling tradition for today's fast-paced business world:

- Crafting a compelling story is contingent upon a strong understanding of your

target audience, or listener.

- Consult data where available to communicate your value most effectively, and provide individualized messaging that is clear and authentic.
- Create a storyline that's easily and quickly understood to match today's short attention spans.
- If presenting to a group, visual representations can be eye-catching, emphasize key messaging and evoke a certain feeling about you and your organization. Stick to the 1-second chart rule – the point of the visual should be understood within a few seconds.

In conclusion, refine your storytelling techniques by properly understanding your audience, identifying and sticking to your value proposition, using visual cues to simplify messaging, and being authentic in your communication to connect with your listener.

FMI on storytelling, [contact Tim Brigham](#).

## Local resources can help internship programs get up and running

Most of us appreciate the chance to “test drive” before committing to a purchase, contract or other binding agreement.

Internship programs offer both the prospective employee and employer a chance to learn and assess fit.

If you/your firm are interested in creating an internship program, or enhancing an established one, there are local

resources available.

**Educate Maine** works with employers throughout the state to build out experiential learning programs, offering resources to help attract, train and retain talent.

One of its programs, **Maine Career Catalyst**, offers free consulting as well as a Summer Internship Program, where interns get free access to over 20 in-per-

son and virtual webinars, networking events and fun excursions.

[Reach out to Jon Delorme](#), Workforce Development Specialist, or [visit the Career Catalyst website](#) for more information.

The MECPA can provide additional support to you/your firm, by adding an accounting-specific focus to your internship program.

### CALENDAR – Continued from page 1

**Nov. 6 & 7 – Maine Tax Forum.** [Register](#).

**Nov. 20 – How ESG Reports Can Help with Retention & Recruiting,** 1 CPE. [Register](#).

**ON THE SOCIAL SIDE:** Mark your calendars, and stay tuned for these events:

**Nov. 7 – Golf Clinic & Play,** XGolf, Portland, 5-7 p.m. Sponsored by NBT Bank.

**Dec. 5 – Virtual Scavenger Hunt.** 4:30-6 p.m. Seeking sponsors for this fun, team-building event with the N.H. Society.

## Thanks for helping scholarship thrive

Throughout this milestone year, we have recognized MECPA members for their contributions to the success and vibrancy of the Maine accounting community.

Thanks to the incredible support of former and longtime members, the MECPA Endowed Scholarships at Husson University, University of Maine and University of Southern Maine, we're able to continue to support accounting students on their path to graduation and professional work.

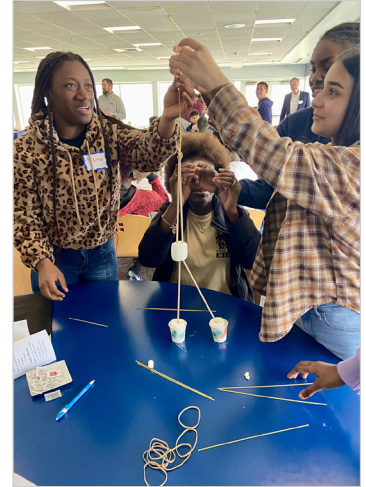
A big shout-out to one of these long-term members: Bob Grieshaber, a member for 53 years!! Yes, you read that right! Bob has been a dedicated volunteer, having served on the Board, as a Committee member and Key Person. Thank you Bob! Have you been a Society member of for more than 25 years? [Let us know!](#)

# MECPA outreach pipeline work ... in pictures

Over the past few months, MECPA Executive Director Trish Brigham traveled from Biddeford to Bangor, meeting with students to promote the profession and the exciting career opportunities it offers. MECPA members from BBSC, Dufour, The Swanson Group and Wipfli contributed to these pipeline expansion efforts that benefit Maine's accounting community as a whole. Enjoy this sampling of photos from the events!



The MECPA, Wipfli and St. Joseph's College sponsored a program for high school students – "Is Business for Me?" – in May to raise awareness about business studies and career opportunities, particularly in accounting. The day was a great success, thanks to student panelists and professionals from NBT Bank, Empeople and Wipfli. [Watch a video of program here.](#)



The team at BBSC in Bangor hosted a group of Brewer High School students in May to share stories and anecdotes about public accounting career opportunities.



Students visiting The Swanson Group, LLC in Westbrook spin a wheel full of accounting-related questions related to tax, audit & bookkeeping to learn about the different areas of accounting.



MECPA Executive Director Trish Brigham joins an enthusiastic team from Northeast Bank to present JA (Junior Achievement) in a Day, at Biddeford Middle School in April. The program guided students through career-mapping exercises.

## ADVOCACY

# AICPA Spring Council Update: Agenda items run the gamut

Pipeline and licensing topped the agenda at the AICPA Spring Council meeting in May in Orlando.

A survey of attendees revealed that a majority, 73%, believe telling a more compelling story about accounting careers is the best way for them to personally impact on the pipeline, followed by enhancing the employee experience (40%) and growing support for CPA Exam candidates (30%).

Employers and managers indicated they were most

interested in reducing work volume (55%) and clarifying career progression opportunities (41%). When asked where they might see themselves impacting the pipeline, Council members said college campuses (64%), middle and high schools (50%) and mentoring new accountants and CPA Exam candidates (44%).

This information will inform MECPA advocacy efforts



around pipeline and licensure.

The rapid digital transformation of the profession, particularly, Generative Artificial Intelligence, was also a hot topic.

There is a demand for training as employees need, and want to develop new competencies and skills to remain relevant.

CEOs see AI as the technology that will have the most impact over the next few years. Employees fear that impact

may result in job losses.

In addition to training programs, firms need to develop and/or refine policies and governance in the AI realm.

The audit process also is transforming as a result of technology. Dynamic Audit Solution (DAS), developed by the AICPA, CPA.com and Caseware International, is being evaluated by the top 100 firms, and has been used in more than 2,500 engagements.

DAS offers a new approach to auditing. FMI about DAS, [view this AICPA video](#).

## We're still working to get STEM designation

The MECPA joined all state societies, numerous universities and the AICPA as a signator on [this letter](#), submitted to the Department of Homeland Security, requesting the inclusion of accounting on its approved degree program list for STEM.

This most recent submission to DHS includes a new whitepaper that provides in great technical detail the data supporting the profession's reasoning to include the Accounting CIP code in the STEM Designated Degree Program List.

## Communication with MRS is mutually valuable

Advocating for you includes nurturing a relationship with Maine Revenue Services. MECPA's Taxation Committee and several members met with representatives of MRS to discuss electronic filing compatibility, PTET legislation and Board of Tax Appeals.

We plan to continue these meetings as a way to communicate tax practitioners' concerns and insights with MRS staff. A few reminders from MRS:

The tax practitioner hotline, manned

by senior staff members, is available 9 a.m.-noon: 207-626-8458.

MRS Tax Alerts are a timely and valuable info source. [Subscribe here](#).

MRS welcomes comments on their Draft Rules. Be sure to [bookmark this spot](#) to stay on top of issuances and comment periods.

Have a state tax or legislative issue you're concerned about? [Let us know](#) so we can add it as a discussion item at an upcoming meeting.

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## Chance meeting with author leads to a great summer read: a book sure to intrigue CPAs

Even for “numbers” people, writing is an important skill to have.

For one former banking executive, a 50-year career as a finance executive for the likes of PNC Bank, Sunbeam Corp., Republic Bancshares and the American Association of Bank Directors has provided ample material for a series of books that has turned him into a mystery writer celebrity of sorts.

On a stopover in Boothbay Harbor after an event in Bangor this summer, I had the pleasure of running into Charles Thayer, a boating enthusiast and part-time resident of Boothbay Harbor, who has authored several books whose main character is a forensic accountant.

If you’re looking for a compelling read this summer, check out “Death & Due Diligence.” I guarantee you’ll find the story engrossing and relatable!

– Trish Brigham



Author and former high-finance exec Charles Thayer in Boothbay Harbor.

## Attention audit firms: PCAOB considers more reporting requirements

The comment period closed in June for the Public Companies Accounting Oversight Board’s proposed rules which would require public reporting of firm and engagement metrics, including firm financial information and performance ratings for certain size firms, and information about governance, networks and cybersecurity risk management for all firms.

The proposal now undergoes further analysis and consideration by the PCAOB.

[Here’s the proposed rule on firm reporting](#) and [here’s the one on firm and engagement metrics](#). The proposals, aimed at increasing audit firm transparency and reporting consistency across firms, would benefit investors and audit committees.

[Read more here.](#)

## Accounting errors are on the rise; Take steps to avoid them!



Realizing that the socks you donned in the semi-darkness before work this morning don’t quite match is an amusing mistake. The same cannot be said about errors that occur on the job while wearing those socks!

Take steps to minimize the disruptions and fallout of mistakes by cultivating a robust internal control environment.

[Read more here.](#)

## Let’s talk about automation & tech

A topic this big and fast-moving requires big thinking and big conversations. If your firm is grappling with how to incorporate and leverage automation, you’re not alone.

Interested in a panel discussion and/or presentation on this issue? Let us know.

## Maine TAX PORTAL

### Portal set to be fully functional Oct. 15

The final phase to make the Maine Tax Portal fully functional will be complete on Oct. 15. At that point, all types of taxes will be able to be filed electronically, and legacy reporting systems for the following taxes will no longer be available:

- Special Fuel and Gasoline Excise Tax
- Fuel Tax Refund Programs
- Gasoline Shrinkage
- Real Estate & Controlling Interest Transfer
- UT Excise Tax (Collectors only)
- Unorganized Territory Property Tax

Maine Revenue Services is hosting webinars for taxpayers and providers who file these taxes.

[FMI and Register here.](#)

## INDUSTRY NEWS



MECPA Annual Meeting attendees in May, listening, learning and networking.

## Increase your comfort with networking; It's still a must at every career stage

If the term networking sends shivers down your spine, you are not alone!

Humans are most comfortable with predictability and control – but tend to feel most alive when these are not present.

You know that networking benefits professionals in all career stages, by going beyond business growth, expanding perspectives, exposing new ideas and problem-solving approaches, and uncovering career advancement opportunities. So, what can you do to increase your networking comfort level and success?

Ask questions and practice listening!

Prepare a list of questions that will elicit more than a quick, yes/no answer.

Don't be afraid to engage in deeper, more meaningful conversations.

Modifying the standard, "What do you do" to "What is the favorite part of your work day?" or "What is an interesting lesson you've learned in your job?" likely will elicit a more enthusiastic response.

Then to keep the conversation going, you'll need to listen attentively, so respond in a similarly engaging manner.

The MECPA offers numerous opportunities for networking through committee work, social events, panel presentations and more.

Please consider participating – for our benefit and yours. You might even have some fun!

## DOE reporting regs may impact curriculum

Stakeholders with varying opinions on how to create alternative CPA licensure pathways that meet the changing business and demographic environment share one unifying goal: maintaining mobility and substantial equivalency.

The benefits for firms and working professionals are obvious.

Now, with newly issued regulations from the Department of Education, the value of these concepts becomes more pronounced for educational institutions, particularly those engaged in distance learning.

[This article](#) explains the nuances



of these new regulations that impact colleges and universities preparing students for careers involving state-issued licenses.

## Maine Board of Accountancy has two new faces



Alison Lorenz



Penny Vaillancourt

MECPA member Alison Lorenz was appointed to the Maine Board of Accountancy in June.

She is Managing and Tax Director at One River CPAs. Lorenz began her career at Fidelity Investments, then joined One River CPAs (formerly PFBF), where she has worked for 18 years.

Lorenz is a past Board Member for the Maine Society of CPAs and an AICPA member. She also serves on the Board of a local bank.

"The Maine Board of Accountancy is something I have been interested in for a long time," she said. "I find the rule-making process intriguing and look forward to learning more about it. With the decline in CPAs nationwide, I am hoping that we have an opportunity to consider changes to the requirements to be a CPA in Maine with the goal of more in-state individuals having opportunity for licensure."

**Another new BOA face:** Penny Vaillancourt was named administrator for the Board several months ago. She is a graduate of the University of Maine at Orono (B.S. in Secondary Education) and brings to the position 32-plus years of public service experience in legislative, regulatory and public policy matters working for the Departments of Transportation, Education, and Professional & Financial Regulation and in the office of former Gov./now U.S. Sen. Angus King.

Vaillancourt also serves as Executive Director of the Board of Dental Practice. [Reach her here.](#)

### Upcoming Board meetings:

Sept. 10 & Nov. 12.

For meeting agendas and minutes, [go here.](#)

# News From Over the Border:

NHSCPA upcoming live events

## Emerging Leader Summit

August 22nd 2024

Southern New Hampshire University



## Young Professional Golf Clinic

August 29th 2024

Souhegan Woods,

Amherst NH

Email [mcoakley@nhscpa.org](mailto:mcoakley@nhscpa.org) if intrested

## Tax Camp

Novmber 5th 2024

The Puritan Backroom,

Manchester NH

## Tax Forum

With McLane Middleton

November 22nd 2024

The Grappone Center,

Concord NH

## Womens Golf

September 22nd 2024

Stone Bridge Country Club

**Next joint venture in our  
friendly Battle of the Bridge:**

Mark your calendars for Dec. 5 (4:30-6 p.m.), when the MECPA takes on the NHSCPA for a Virtual Scavenger Hunt. Stay tuned! We're seeking sponsors!