



ADVOCACY & CONNECTION: VOL. 8, NO. 2, APRIL 2025 NEWSLETTER



Jennifer Elder



Bridget Kenneally



Kymberly Messersmith



Tom Morgan



Victoria Navarro

## Something certain: Engaging sessions, great networking and celebration

We're not exaggerating when we say the speakers for our May 15 Annual Meeting & Recognitions event in Brunswick are fantastic!

Let's start with Jennifer Elder, CPA, CSP, Senior Solutions Consultant with the AICPA and CIMA, who has presented to over 15,000 people in all 50 states and 12 countries. She'll address how CPAs can harness the power of AI while mitigating risks and ensuring compliance.

And she'll moderate a discussion on branding and relationship building with super panelists Bridget Kenneally, Vice President for emerging growth for

**WHAT**  
2025 Annual Meeting & Recognitions

**THEME**  
Weathering Change: Finding True North

**WHEN**  
8:30 a.m.-1:30 p.m.  
May 15

**WHERE**  
The Brunswick Hotel, Brunswick

**CPE**  
3 credits

Deloitte; Tom Morgan, University of New England

**SEE PAGES 9-11**  
for Meeting Preview

business Professor and Sales Consultant; and Victoria Navarro, Senior Vice President of Analytics for Allen & Gerritsen.

Also, Kimberly Messersmith, KPMG's Managing Director of State Government Affairs & Public Policy, will tell us what accountants need to know about fast-changing legislation.

But wait, thanks to our sponsors below, there's more: awards, recognitions, lunch, a little business and fun. P.S.: Students attend for free.

We hope you'll join us!

### EXECUTIVE DIRECTOR NOTE

## We're here to help you find your True North

"People who work together will win, whether it be against complex football defenses, or the problems of modern society."  
– Vince Lombardi

It's wonderful to have a support system/team to help power you through rough spots. I see the MECPA as just that – the coordinator (QB? captain?)



Trish Brigham

of a team whose members together navigate tougher times and achieve great goals.

Hence the theme and topics for our May 15 Annual Meeting & Recognitions event, which we chose intentionally, given the uncertain economic, legislative and social climate: **Weathering Change: Finding True North.**

Dynamic speakers (see left) will tackle issues you regularly confront that are looking quite a bit different nowadays: AI, legislation and branding/business development.

We're hoping you'll take part as we start a new membership year by learning from experts, welcoming new CPAs and celebrating outstanding members.

Keep in mind that we're right here, on your team, advocating for you – and eager to help where we can.

– Executive Director  
Trish Brigham



## Advocating for you – always the No. 1 priority

Kudos and thank you to MECPA Tax Committee members who meet regularly to review tax legislation, testify to legislators and provide input to our lobbying team at Pierce Atwood. With a lot of tax-related bills this

legislative session, they've been extra busy. This is important work to fulfill our mission of advocating for sound tax policy.

Please [contact Chair Mike Santo](#) if you'd like to share your expertise and get involved.

## Reinforcing and strengthening our efforts makes advocacy as effective as possible

We stay on top of legislation and news that impacts you and the accounting profession.

To ensure that our advocacy efforts on your behalf are as effective as possible, we invite you to read the information below and get involved when appropriate.

Your voices inform our decisions and actions more than you may realize!

We respect your time and want to make this as easy as possible.

Please consider these points:

### Stay informed.

Read our weekly Leg Up (Legislative Update) emails. These curated updates typically are sent early on Mondays – and more frequently when urgent legislative news happens. We hope you find them beneficial.

Please note that you can [access Leg Up archives here.](#)



### Reach out to legislators when we recommend it.

When many constituents contact legislators on a particular issue, it can make or break the outcome.

We include relevant links when possible and recommend bookmarking these links to state legislators in the House and Senate. We also provide communi-

cation templates on request.

### Testify when you're passionate about or have in-depth knowledge on an issue.

[Let Trish Brigham know](#) if you're willing to do so. Yes, our Pierce Atwood lawyers advocate on your behalf, but please don't underestimate the value of your hands-on expertise and experience.

### Encourage non-member friends & colleagues to join the MECPA.

Members help fund our lobbyists and the rest of our advocacy efforts – plus people you care about will reap our other benefits.

### Join our Taxation Committee.

The committee deals most directly with legislative and Maine Revenue Services issues. Email Chair Mike Santo [here.](#)

Compliance

Payroll

HR

## Free Monthly Educational Sessions

April 15<sup>th</sup> @ 2pm

Attracting, Hiring &  
Onboarding A+  
Team Members

September 16<sup>th</sup> @ 2pm

What's in the File?  
HR & Employee  
Documents You Need

May 20<sup>th</sup> @ 2pm

Unconventional  
Employee Benefits:  
Thinking Outside the Box

October 21<sup>st</sup> @ 2pm

Hiring and Managing  
Foreign Workers

 PaperTrails

Register at [papertrails.com/webinars](http://papertrails.com/webinars)

## BEYOND THE NUMBERS: JORDAN T. KENNEDY

### He's making the most of opportunities the MECPA offers



We appreciate Jordan Kennedy, Co-Chair of the MECPA Difference Makers Committee, who makes a habit of showing up – to help and participate in our events. He nearly singlehandedly organized the Young Professional Ski weekends we co-hosted with the Maine Bar Association a few years back. Learn

more about him below.

Know someone (it could be you!) who would be an interesting candidate for this quarterly feature? Please let [Trish Brigham](#) know.

#### Name

Jordan T. Kennedy

#### Employer/Title

Office of the State Controller, Financial Reporting Division/Financial Management Coordinator

#### How long in the accounting profession?

Eight years.

#### How long have you been a member of the MECPA?

I have been involved with the MECPA since 2017.

#### How has being an MECPA member helped you or allowed you to help someone else?

The MECPA has provided me with the opportunity to be involved with organizations like the Boys and Girls Club, Good Shepherd Food Bank, The Locker Project and many others, helping to lend a hand to those in need in our community.

#### Best advice you've received?

From Pete Dufour of Dufour Tax Group: How do you eat an elephant? One bite at a time!

#### When you have free time, what do you do?

Enjoy Maine's vast outdoor spaces. If there is an adventure to be found, count me in.

#### Favorite vacation spot?

Anywhere with blue skies and deep snow.

## Thank you, volunteers!

We're grateful for the people who take the time to help the MECPA fulfill its mission. Here are some recent volunteers who have been particularly giving:



**Spencer Hathaway**, Baker Newman Noyes: Classroom speaker, Sacopee Valley High School

**Allison Bishop**, Bishop Consulting: Classroom speaker, Cape Elizabeth High School

**BerryDunn**: MECPA Team Up to Move Up Mentor Program support

**Jake Black & Allison Robbins**, BerryDunn and **Donna Oxley**, Freeman & Company CPAs: Hampden High School Career Fair

**Barb Belik**, Belik, Esq., LLC: South Portland High School ELO event, CPA/J.D. rep

**Deloitte, KPMG, NBT Bank**: Annual support

**ARB, Berman & Simmons** attorneys, **Dufour, Wipfli, MECPA staff**: The Locker Project mac 'n cheese collection

**Karla Brannen**, Brannen CPA Services, and **Bob Grieshaber**, Grieshaber CPA: Key Persons representing the MECPA as advocates with the Maine federal legislative team

**Ian Lichtenberg** and **Eva McCarthy**, Baker Newman Noyes: Informational interview with Jobs for Maine Grads (JMG) students at Lewiston High School

**Laura Emack**, CPA, SBA Seminar coach

## Algebra 1 tutors needed!

We like connecting you to volunteer opportunities that align with your interests and aptitudes when possible. Here's one that fits the bill:

$$x^2 + 6x + 9 = 0$$

9th graders  
**Where:** Portland High School

**When:** 10:45-11:45 a.m. Thursdays. Weekly or bi-weekly commitment.

**Why:** Make a difference in the life of a high school student.

#### Other Details:

- Training provided.
- Homework help with teacher support, also use online IXL tool to guide student through practice problems
- Background check required

For more info, [contact Rachel Pargeter](#), Math Motivators program coordinator.

Several tutors are needed ASAP for the Math Motivators algebra tutoring program (in partnership with The Actuarial Foundation) because of amazing interest – 50-plus students signed up!

If you have a mathematics background and/or are comfortable tutoring Algebra 1, please consider this volunteer opportunity.

**What:** Algebra 1 tutoring for

## MEMBER NEWS

## Mark your calendars! Here's a great mix of worthwhile events

"Spring" into a new season and membership year with some opportunities for both personal and professional development. For a complete list and updates, [visit mecpa.org](http://visitmecpa.org).

### May 6

Government Accounting & Auditing Virtual Conference,  
4 CPE. [Register](#).

### May 15

Weathering Change: Finding True North  
Annual Meeting & Recognition.  
3 CPE. [Register](#).

### June 11

Boost your firm's revenue with advisory services.  
1 CPE. [Register](#).

### June 12

Tax Incentives & Solutions for Businesses and Real Estate  
Owners, co-hosted with the New Hampshire Society  
of CPAs. In-person in Portsmouth. [Register](#).

### June 17

Accounting & Auditing Virtual Conference  
8 CPE. [Register](#).

### June 17 & 18

NEGASC, Champlain College, Burlington, Vt.  
[Register](#).

### June 24

K2's Ethics & Technology  
4 CPE. [Register](#).

## NOW ... ON TO SOME FUN

### TBD

Golf Tournament & Play  
We're in the planning stages for this. Stay tuned.

### June 3

Join the Difference Makers Committee at 5 p.m.  
at Austin Street Brewery in Portland for a post-busy season  
social and planning session. Not in the Portland area?  
No problem! We'll loop you in.  
Contact Co-Chairs [Jordan Kennedy](#) or [Kirin Schrum](#).

### August 14 & 15

Guided Leadership Adventure in the White Mountains  
with the New Hampshire Society of CPAs  
Limited space available. Details to come.



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## MEMBER NEWS

## Tower of power



Kudos to Albin Randall & Bennett for collecting and donating 621 boxes of mac 'n cheese for The Locker Project's drive to keep children from being hungry during school vacation week. The MECPA partnered with this great organization in this worthwhile effort. Berman & Simmons attorneys, Dufour and Wipfli also took part.

Thank you  
to outgoing Board members

Barb Belik

Hats off to outgoing Board members Barb Belik and Sam Hornblower.

Barb was President this year, lending her skills as an educator, attorney and CPA to the role.

Her experience working with college students was a valuable asset for our pipeline initiatives.

Sam recently Co-Chaired



Sam Hornblower

the Innovation & CPE Committee and previously led the Difference Makers Committee with his characteristic enthusiasm – and athleticism.

Thanks in part to Sam, the MECPA's winning streak in kickball, softball and dodgeball stands! Sam also was a core part of the MECPA's pipeline efforts.

## PIPELINE

## A wonderful wrap-up to the MECPA's first mentor program



Above: Participants in Thursday's wrap-up to our first mentor program mingle at UNE. Right: Mentor Matt Barbour and his mentee Sean Moore share information about their experience working together.



Lively, easy-flowing conversations, lots of smiles and great feedback was the perfect way to celebrate the conclusion of our first mentor program Thursday afternoon at the University of New England campus in Biddeford.

It was wonderful to see so many faces of those involved with the Team Up to

Move Up Mentor Program and learn what worked and how we can make improvements for next time.

Yes, there will be a next time as this one was deemed a resounding success – an impressive 15 students took part!

The concensus was that it was a valuable learning experience for both men-

tees and mentors – and that many of the work relationships developed will continue beyond the program.

A special shoutout to MECPA Board Member Tami Gower and her team, who helped us organize this enjoyable event. Tami is a UNE business and accounting Professor.

# Apprenticeships offer a new training model

By Joanne E. Fiore, J.D.  
Vice President, Pipeline and  
Apprenticeships, CGMA Americas

A Fortune 500 corporate controller recently shared that he's spending half his time planning for tariffs.

Much like planning during the COVID-19 pandemic, this scenario was unexpected and uncertain, requiring skills such as sensemaking, critical thinking and storytelling to chart a path for the company. For this controller, it followed two years of organizational transformation, making resilience and collaboration especially crucial.

This scenario raises questions about how prepared less experienced team members are to face these challenges and how they develop "success competencies."

Just-in-time, on-the-job experience is undoubtedly one way, but such skill sets can also be taught and practiced in an instructional setting ahead of time.

Such experiential learning underpins AICPA & CIMA's new professional registered apprenticeships – a powerful combination of online/classroom learning and on-the-job training augmented by a mentor.

The Registered Apprenticeship for Finance Business Partners utilizes the global Finance Leadership Program, leading to the Chartered Global Management Accountant (CGMA) designation. The learning program is entirely online and scenario-based, incorporating real-world examples that enable learners to apply their knowledge.



Be on  
the lookout  
for **DUES  
NOTICES**  
for the new  
membership  
year that  
starts  
**June 1!**

## Delivering on what finance leaders need

### Boundary Crossing Competencies



That combination of instructional learning and experiential learning, achieved through on-the-job training with a mentor, provides the foundation for developing the skills necessary for transformative times like these.

Additionally, the apprenticeship program has been demonstrated to reduce turnover, enhance coworker productivity, and cultivate future managers, among other indirect benefits.

The Finance Leadership Program has three levels of learning, in addition to a Foundational one.

At the top is the Strategic Level for CPAs, focusing on strategic and risk management and financial strategy. Under that is the Management Level, with its emphasis on people and leadership, hu-

man resources, and project management. Underpinning is the Operational Level, which teaches or reinforces technical skills such as digital finance, management accounting, and financial reporting.

Learners are placed at the appropriate level, depending on their education. There is an entry-level apprenticeship for those with a high school diploma.

This combination of deep technical skills and boundary-crossing success skills develops what we refer to as a T-shaped Professional (see *image above*).

The challenges facing accounting and finance teams require upskilling in technical and success skills. Experiential learning through apprenticeships is a time-tested way to acquire them.

For more information, contact me [here](#).

## Students can learn important life skills at FREE Financial Literacy camp in Portland

Personal financial literacy is synonymous with the accounting profession.

Programs that expand this type of knowledge in our communities are valuable on many levels.

With funding provided by the Finance Authority of Maine (FAME), students from around Greater Portland can attend a week-long summer institute, focused on Personal Financial Literacy, for FREE.

This year's camp is July 21-25 on

Waynflete's campus in Portland.

Last year, MECPA Executive Director Trish Brigham had a chance to meet with participating students to share information about accounting career opportunities and to mentor several of them through a culminating project.

She plans to repeat this experience in July.

Know a student who could benefit from attending this camp? FMI [here](#).

# Starting early: Innovative program will show Maine high school students attractiveness of accounting

In partnership with high school counselors in Greater Portland, we're creating an "internship" program aimed at educating high school students about career paths in the accounting profession.

Over the past few years, the MECPA has fielded an increasing number of requests for after-school internships for high school students.

However, the nature of the work performed and schedule constraints most accountants encounter present logistical challenges.

The solution?

An **Accounting ELO** (Experiential Learning Opportunities) that will offer a manageable way for employers to interact and connect with high school students and help nurture potential future employees.

The program will offer students up to 40 academic credits hours and includes funding from the state.

Participating employers will host up to 15 students, typically at their offices, for one or two 1.5-hour sessions and will receive guidance and suggestions on how to most effectively conduct these sessions. Hosting employers will be invited to a concluding event featuring student presentations about their experiences.

The initiative is modeled after a highly successful program – LAW ELO, which facilitates interaction with local attorneys, law firms and the University of Maine School of Law for students interested in pursuing law-related careers.

This effort was begun by a group of Cumberland County high school guidance and career counselors, who are also working on a similar program with the Maine Academy of Modern Music.

"My experience with the LAW ELO program was outstanding," said Pierce



Atwood's Matthew Stein. "The preparation time was limited, and the interaction with students was uplifting. They were fully engaged, curious and thoughtful. I wouldn't hesitate

to do it again."

If you're interested in participating, please [contact Trish Brigham](#) for a link to a virtual information session at 9:30 a.m. on May 20.

## Career Fair Ambassadors

From left, Jake Black of BerryDunn, Donna Oxley of Freeman & Company CPAs, and Allison Robbins of BerryDunn had a great time interacting with high school students about accounting opportunities at the Hamden High School Career Fair in March.



## Pipeline efforts ARE yielding results!

Thank you to many of you who have contributed to the MECPA's numerous initiatives to expand the talent pipeline into the accounting profession.

While there is still work to do, it looks like our efforts may be paying off.

According to [this article](#) in the online newsletter, cfobrew, accounting enrollments are the highest they've been in nearly five years!



## MECPA Endowed Scholarships provide valuable support for accounting students in Maine

It's been nearly 10 years since the MECPA dissolved its scholarship fund and distributed accumulated funds to foundations at Husson University, the University of Maine and the University of Southern Maine in the form of endowed scholarships. These institutions continue the tradition of awarding scholarships to deserving students majoring in accounting.

Here are three of this year's recipients, all of whom expressed sincere gratitude for the support!

**Abigail Maily** is graduating in May with a bachelor's degree in Accounting from the University of Maine. She is a graduate of Harpswell Coastal Academy.

**Jordyn Glidden**, a graduate of Hermon High School, will graduate from Husson University next month with an MBA, bachelor's in Accounting and a Certificate in Finance.

In addition to teaching dance classes, she also works at Bangor Savings Bank, where she'll continue to advance her career post graduation.

**Alexia Knowlton** will graduate from the University of Maine next May. She is a graduate of Oceanside High School.

"My goal is to complete my degree and start working in the accounting field as soon as possible so that I can give back to my community in a similar way to how you have helped me."

## Fall recruitment/ interview schedule for Maine colleges and universities

We definitely don't want to think about fall yet but do want to provide some information to assist your planning for the recruitment season. As more information becomes available, **we'll update** this schedule on the MECPA website.

### Husson University

Meet the Firms Night: Around Sept. 18, 4-6 p.m.

On-Campus Interviews: [Contact Joe McGovern](#).

### University of Maine

Accounting Firm Night: Sept. 17, 4-6 p.m. in Buchanan Alumni House.

On-Campus Interviews begin Sept. 29.

Contact: [Kate Axelsen Foster](#)

### University of New England

Career Connections Series, in lieu of Career Night, will be ongoing through the fall. Public accounting firms are invited to participate. At events held 11 a.m.-1 p.m. Tuesday-Thursday, firms can set up tables in the Commons area to provide information on internships, early career jobs, etc. Interactive activities like cornhole, raffles and giveaways that prompt students to stop by are encouraged. Contact:

[Dylan Brothers](#) and [Ashley Bigda](#).

### University of Southern Maine

Meet the Firms Night: Sept. 18, 4-6 p.m.

On-Campus Interviews: Monday, Sept. 29 through Friday, Oct. 3. Contact: [Ben Cates](#).

## Harness your power! Tips for promoting our great profession well

Every accountant is an ambassador of the profession.

To help you be more effective in this role, we've compiled some resources to boost your confidence and enthusiasm ... and maybe even allow you to enjoy the opportunity to interact with students and career changers.

Hosting a student for a career shadow experience? [This one-page guide](#) provides some helpful tips on how to make your student's visit a win-win for you and them.

Accounting + – an affiliate of the AICPA and a partner with numerous firms and state CPA Societies – provides resources to students, educators, parents and professionals, all aimed at promoting the accounting profession. [Go here FMI](#).

### Flip the Script!

Reframe the narrative when describing what you do and what the profession is all about.

It's EASY and makes a big difference!

**SAY:** "I just assisted a client in analyzing

product pricing or financial performance for subsidiaries across the country" ... INSTEAD of "I have been so busy!"

**SAY:** "I am so lucky to work with a client in the sports/banking/food/retail world because their business aligns with my personal interests" ... INSTEAD of "I had to work over the weekend to do an inventory count."

**SAY:** "I enjoy working with lots of different people" ... INSTEAD of "Its been crazy being on so many different client assignments."



# 2025 ANNUAL MEETING SCHEDULE

(Times are approximate!)

**8:30-9 a.m.**

Registration & Welcome

**REGISTER  
HERE!**

**9-9:50 a.m.**

**Session 1:**

**Legislation Impacting Accountants:  
What You Need to Know**

From CPA licensure to tax on services, the legislative landscape is changing rapidly. This session provides critical insights and analysis on legislative activity and policy impacting the accounting profession and the role state CPA Societies play.

**Speaker:**

Kymerly Messersmith  
Managing Director, State Government  
Affairs & Public Policy, KPMG, LLP

**9:50-10 a.m.**

**Break:**

**Sponsor comments**

**10-10:50 a.m.**

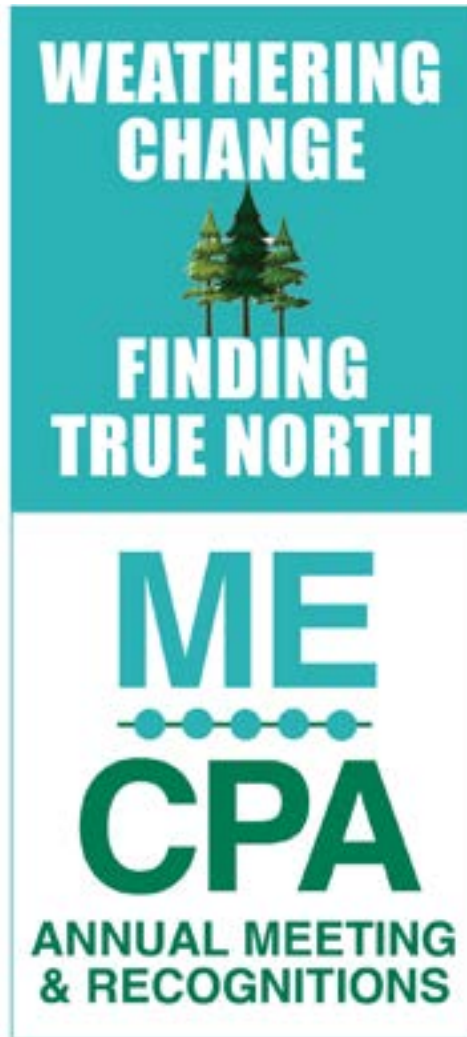
**Session 2:**

**Interactive panel discussion:  
What's Your AND? Conversations  
for Brand & Relationship Building**

Standing out in a competitive and challenging talent and business environment requires smarts – and not just the academic kind. Panelists will share tips about cultivating strategic relationships for personal and professional success.

**Key highlights/how-to's:**

1. Seek out and gain valuable experiences and leverage them to highlight your own brand.
2. Showcase your unique value most effectively.



3. Network and establish long-term relationships to recruit better business vs. any business and/or short-term wins.

**Panelists:**

Bridget Kenneally  
Vice President, Emerging Growth  
Company Practice, Deloitte

**Tom Morgan**

University of New England Business  
Professor and Sales Consultant

**Victoria Navarro**

Senior Vice President of  
Analytics, Allen & Gerritsen

**Moderator:**

Jennifer Elder  
Senior Solutions Consultant, AICPA  
& CIMA

**10:50-11 a.m.**

**Break:**

**Sponsor comments**

**11 a.m.-Noon**

**Session 3:**

**Balancing Risk & Reward:  
Smart CPA's Guide to AI Adoption**

Artificial Intelligence is rapidly transforming the accounting profession, offering game-changing opportunities for efficiency, accuracy and strategic decision-making. But with great potential comes great responsibility – How can CPAs harness AI while mitigating risks and ensuring compliance?

In this session, you'll discover a strategic roadmap for AI adoption, guiding you through the critical steps of identifying use cases, evaluating risks, selecting the right opportunities and managing change within your firm. You'll gain insights needed to ensure AI enhances, rather than disrupts, your role.

**In this session, you'll:**

1. Identify high-impact AI use cases in accounting and finance.
2. Develop a framework for ranking and prioritizing AI opportunities.
3. Understand risks and how to manage them.

**Speaker**

Jennifer Elder  
Senior Solutions Consultant, AICPA  
& CIMA

**Noon-1 p.m.**

**Lunch, Business Meeting**

**1-1:30 p.m.**

**Finding True North Awards  
Presentation & New CPAs  
recognition**

**BIG NEWS: Students attend the Annual Meeting for FREE!**

## 2025 ANNUAL MEETING PREVIEW

## Welcome, newly licensed CPAs!

*Congratulations to the following professionals for earning their CPA licenses during the past year.*

*They'll be recognized and presented with certificates at the May 15 Annual Meeting:*

Randall F. Andrews Jr.  
Patrick J. Breheny  
Amy Cyr

Hilary S. Cyr  
Noah Ferrante  
Katherine R. Filpus  
Peggy Anne Frank  
Zachary Gilbert  
Robert Gould-Wetmore  
Edwin F. Grant  
Kestrel Diana Harvell  
Brian S. Kupresanin  
Kyle M. Landaman  
Grace Little

Thomas MacGregor  
Krista Marie Maran  
Jonathan M. Marcotte  
Carol A. McCoy  
Dylan J. Oxley  
Amy Marie Pickering  
Michael E. Sly  
Casey Sudbeck  
Gregory M. Surette  
Paige Trask  
Meredith Wicks



## Board of Governors slate for FY June 1, 2025-May 31, 2026

### President

Jake Black, CPA, BerryDunn

### President-Elect

TBD

### Treasurer

Spencer Hathaway, CPA, Baker Newman Noyes

### Secretary

Heather Perreault, CPA, Town of Falmouth

### AICPA Elected Representative

David Stone, CPA, CFE, MBA, BerryDunn

### AICPA Designated Representative

Jake Black

### Board members

Dave Barrett, CPA, CMA, University of Maine

Micah Davis-Johnson, CPA, CFA,  
Aries Wealth Management

Mike Santo, CPA, Wipfli

Kirin Schrum, CPA, Purdy Powers

J. Kenneth Stewart III, SVP, M&T Bank

### Board Nominees

Matt Barbour, CPA, McLeod | Ascanio

Stefan Lange, CPA, MBA, VP, Controller, Partners Bank

### Student Representative Nominee

Riley Andrews, University of Maine



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Want to get involved with the MECPA? Check out opportunities [here!](#)

# Congratulations to our Finding True North Award winners

## THE RISING STAR

*For outstanding performance  
and advancement in the early career stage*

### Riley Andrews

Intern, BerryDunn; student, University of Maine

Riley is an audit intern at BerryDunn in Bangor, where she'll work full-time after completing her MBA at the University of Maine next month.

She has consistently demonstrated strong leadership and initiative, balancing high-level client work with a commitment to mentoring and developing others.

Riley has been an invaluable member of the MECPA Board, serving as its student representative for the past year. She has shared insights that have contributed to the success of MECPA pipeline efforts, including the kickoff of our mentor program. She has accomplished all of this while actively progressing through the CPA Exam and pursuing her degree.



Riley Andrews

## THE WISE SAGE

*A respected, encouraging mentor  
and trailblazing leader*

### Rick Cyr, CPA

Principal, Baker Newman Noyes

Rick, a principal at Baker Newman Noyes, provides leadership to the firm as director of assurance services and member of the Management Committee.

He's responsible for more than 100 professionals across five offices.

In addition to his impressive technical skills, Rick is known throughout the firm for being an outstanding mentor. He's respectful to all, finding time – no matter how busy – to listen and advocate on behalf of staff and colleagues.

Sharing his experience and perspective, he assists other professionals in navigating life in a demanding, yet rewarding career.



Rick Cyr

## THE GIVER

*For generously contributing time and talent  
to the profession and community*

### Louise Soucy, CPA

Owner/founder, Soucy Accounting Services

Louise owns a bookkeeping business on Mount Desert Island, where she works with a variety of clients, including small non-profits that rely on having a knowledgeable CPA available to help. Louise is always willing to step in.

She volunteers and works closely with the University of Maine alumni society, coordinating events, writing the column for her graduating class and speaking to admitted local high school students about university programs. Louise serves on the Causeway Club Finance Committee and previously was president. She also serves on the MDI Hospital Board. Louise enjoys giving back to her community through her work and beyond.



Louise Soucy

## THE FORWARD THINKER

*For leadership in driving innovation,  
inclusion and progressive ideas*

### Marc Powers, CPA, CVA

Principal, Purdy Powers & Co.

Many of Marc's clients are entrepreneurs and entrepreneurial businesses, indicative of his embrace of innovation.

He was instrumental in building the firm, but has shown a willingness to address clients' changing needs by expanding what was primarily a tax/audit practice and spearheading a local valuation and litigation support practice, including forensic/investigatory accounting.

Marc considers himself a life-long learner and encourages staff members to be the same. He was a believer in flexible work schedules before the pandemic made them vogue. He continues to model different ways to work effectively while pursuing personal passions and hobbies.



Marc Powers

## MANY THANKS

to our 2025 Annual Meeting sponsors:

Cambridge Trust  
Human Interest

Payroll Management  
UWorld



## The Future of Accounting: Embracing a human-first culture

By Carla McCall, AICPA Chair

The accounting profession is so much more complex and rewarding than it used to be.

For too long, the public has viewed the discipline through a narrow lens of number-crunching and compliance work.

This outdated perception must change if the profession hopes to attract and retain the next generation of talent.

Modern accounting is a dynamic, technology-driven, strategic field, offering businesses insights that go far beyond traditional financial reporting – and there are wide-ranging opportunities for meaningful career growth.

By communicating this evolution, CPAs can reshape public perception and inspire new colleagues.



Carla McCall

### Solving the Talent Pipeline Challenge

A major concern for the profession is the declining talent pipeline. While

attracting new professionals is critical, the greater challenge lies in retention. Human capital expectations have changed: long hours and rigid structures are no longer appealing.

To remain competitive with other fields, CPA firms must rethink their environments by fostering flexibility, innovation, and a sense of purpose.

One significant shift gaining traction is the move away from billable hours. Measuring success by output rather than input allows firms to reward efficiency and effectiveness rather than time spent.

This model aligns with modern expectations and enhances job satisfaction by enabling CPAs to focus on high-value work instead of merely logging hours.

### Key Considerations for Young CPAs

Those entering the profession can embrace change and chart a course.

Here are key insights for early-career accountants:

- **Leverage Technology:** Automation and AI are transforming the field, enabling CPAs to focus on strategic advisory roles rather than repetitive tasks.

- **Prioritize Value Over Hours:** Make the move to impact-driven work. Understand the value you bring to the firm in performance output versus the input of hours.

- **Seek Value Alignment:** Work for organizations that prioritize well-being, flexibility, and career development.

- **Commit to Continuous Learning:** The field is evolving rapidly, making life-long learning essential to staying ahead. Demonstrate intellectual curiosity.

CPA firms must redefine success by prioritizing people over profit. Creating a human-first culture means embracing flexibility, fostering mentorship, and recognizing employees' contributions. Leadership plays a crucial role – without top-down commitment, cultural change stalls.

By adopting a human-first mindset, firms will not only enhance employee satisfaction but also drive better client outcomes and long-term success.

The future of accounting is not just about numbers, it's about people. It's time for the profession to fully embrace this reality.

## AICPA's New Quality Management Standards

All firms with A&A practices will need to move from their current quality control (QC) systems to quality management (QM) systems.

While their QC systems could serve as a base, there are several substantive changes when shifting to QM that require time and resources to implement.

[Resource page here.](#)



### Maine Retirement Investment Trust deadline nears

MERIT enforcement begins July 2025. All employers with five or more employees must register with MERIT and begin making contributions or certify their exemption to

avoid penalties starting in 2025.

Employers who fail to enroll in MERIT without reasonable cause may be subject to penalties.

[Register here.](#)

# Q&A with AICPA's new CEO: What he wants you to know

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from the Indiana CPA Society

In 2025, a new CEO of the American Institute of CPAs and Association of International Certified Professional Accountants took the reins from longtime leader Barry Melancon, CPA, CGMA.

Mark Koziel, CPA, CGMA, has hit the ground running to get acclimated to his new position.



Mark Koziel

This isn't his first experience with this global Association – he had worked with the AICPA for 15 years in multiple capacities before accepting a role as president and CEO of Allinial Global, where he worked from 2020 to 2024 until being selected as Barry's successor.

So our members can get to know him a little better, Mark recently sat down with INCPAS to share what he's most looking forward to as he moves the Association and CPA profession into the future.

## What excited you most about stepping into the role of CEO?

From the start, I have absolutely loved the CPA profession. I actively promote and encourage others to consider a career in this great profession.

I've been fortunate to encounter and accomplish many things, gaining experience in public accounting, corporate finance, politics and public affairs.

For the past five years, I served as CEO of an international association of firms with \$6 billion in revenues.

When I left the Association in 2020, I didn't expect to become its CEO, but my international experience made me a strong candidate. Since WWII, there have only been five CEOs of this esteemed organization.

It is an honor and privilege to serve. I do not take the role lightly, and I am committed to advancing the profession to serve the public interest and meet market demands.

## What are three things you're looking forward to in your first year?

1. Additional Pathway to CPA Licensure

First and foremost, advancing discussions already in the market to create an additional pathway to licensure.

Creating flexibility for those wrestling with the time and cost of education is critical. This conversation has been going on far too long. It was clear that state societies, state boards of accountancy and members in firms and businesses wanted to see this happen.

Even before I started, the team was working on ways to support that. Education is important, as is experience and examination. We will continue to explore how competencies fit into the ongoing health of our profession while maintaining what the public expects of us.

I worry about mobility but have said we need to help our members navigate it and solve for it as quickly as we can.

Meanwhile, there is much more outside of licensure that needs to be done to shore up accounting talent, including continuing to examine firm business models.

2. Reconnecting with Members and Listening

We started an email address, [Ask-Mark@aicpa-cima.com](mailto:Ask-Mark@aicpa-cima.com) and have thus far received just shy of 500 responses – and I've responded to all of them. It's important that we listen and react to members' needs.

For state societies and the AICPA, we have the challenge of keeping the profession self-regulated and having challenging standards to make sure we set the bar high.

But we are also here to serve our members, and I'd like to lean into that a little more.

I've said for years, our members seem to remember more what we do TO them, not for them.

I'd like to do more for members. One thing we're discussing is more focused communities. More on that in the short-term.

3. Reconnecting with Team Members

I plan to check in regularly to make sure we stay focused on our strategic direction to help our members. It's a great team, and I've missed being part of a larger organization.

I've been working hard in these early days to reconnect and look for ways to make their jobs easier, so they serve our members better.

## What has been the biggest challenge of the role so far?

I regularly receive requests to comment on the Washington, D.C., landscape for our U.S. members, as well as for our professionals worldwide and other accountancy bodies seeking guidance on their readings.

The political landscape is certainly interesting and, dare I say, challenging? During my initial days, the team has been focused on securing meetings with key figures in Washington and globally. It's a challenging task because the names keep changing and the topics we need to discuss seem to shift by the hour.

Working to keep up with the current uncertainty has certainly been at the forefront. Our Washington team has done a great job with it, but I worry greatly that our members might not get the support they need from the IRS based on the current landscape.

Keeping up with regulatory changes has been the greatest challenge and will hopefully settle in the second half of the year.

## What excites you about the near future of the profession?

As I mentioned before, the CPA profession is the greatest profession in the world! I'm excited to see it continue and will do my best to help shape the future. There are many opportunities to advance this greatness.

We need to focus on increasing the pipeline, building on the work of the National Pipeline Advisory Group and collaborating with states. Practice changes and helping firms grow through additional services are crucial.

ESG and sustainability remain important, but there's much more. Artificial intelligence will reduce mundane tasks, allowing us to focus on complex, client-facing work.

Expanded services like client advisory services (CAS) enable us to be trusted advisers. New audit tools will add value by providing insights beyond standard reports. We can help Main Street small businesses simplify reporting and oversight.

Creating future-ready finance professionals with the Finance Leadership Program is essential. The list goes on, and there's no shortage of opportunities.

That's what keeps me excited about the future.



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