



BEYOND THE NUMBERS: KIRSTEN LEBREUX

CPA appreciates advice to listen to mentors and advocate for herself

Name: Kirsten Lebreux

Employer/title: Baker Newman Noyes,
Tax Supervising Senior

Time in the accounting profession:
4 years

Time as a member of the MECPA?
2 years

How has being an MECPA member helped you or allowed to help someone else? It has allowed me to expand my professional network and improve my golf game through clinics! It's a terrific way to stay up to date on the CPA application and Exam process to assist young professionals at my firm as they embark on their CPA journey and learn about exciting new developments in the accounting industry, such as the use of artificial intelligence. As a member of the MECPA Difference Makers Committee, I gain exposure to widespread volunteer opportunities in Greater Portland.

Other volunteer organizations you're involved in? Your role? What do you enjoy about it? At Baker Newman Noyes, I'm a member of the Women's Committee, with a focus on creating allyship



Kirsten Lebreux, right, on the links with her sister Katelyn, who is also a CPA.

for women in a professional setting through various skill-building and leadership workshops. I support the United Way of Southern Maine by participating in the annual Day of Action and the

– See **BEYOND**, page 6

EXECUTIVE DIRECTOR NOTE

Your village helps weather changes

While packing during a recent move, I came across Hillary Clinton's *It Takes a Village* book. Lots has changed since its 2007 release, but her theme still resonates.

Technology evolves at lightning speed. Societal norms shift seismically. Legislative environments give new meaning to the term 'survival of the fittest.'



Trish Brigham

Amid all this change, the MECPA is your 'village.' We try to make it easier to adapt to shifting client and industry demands in a variety of ways. These include legislative and professional updates and events that allow you to blow off steam and make valuable personal and professional connections.

Gratefully, we also celebrate a few wins together (licensing changes, for one).

We believe it's more important than ever to have a support system, and we work to ensure that your membership is ever more valuable to you. As always, we welcome your feedback.!

– Executive Director Trish Brigham

Summer's a fine time for both disconnecting and connecting

Enjoy learning new skills or refining ones you already have? See below for excellent upcoming professional development programs.

Plus, our Difference Makers Committee created some great summer events that allow for in-person connections and fun:

PROFESSIONAL DEVELOPMENT

July 28, July 31 & Aug. 5 (virtual)
Surgent's Overview & Analysis of the New Tax Law: Part 1 – Individual Taxation
Presenters: Mike Tucker, Karen Davis, Ed

Renn; 4 CPE.
Register: [July 28](#), [July 31](#) and [Aug. 5](#).

July 24, July 29, Aug. 1 & Aug. 6 (virtual)
Surgent's Overview & Analysis of the New Tax Law: Part II – Business Taxation
Presenters: Mike Tucker, Bob Lickwar, Lance Weiss; 4 CPE.
Register: [July 24](#), [July 29](#), [Aug. 1](#) & [Aug. 6](#).

Aug. 13
Forum Discussions: Shaping the Future of Accounting
Hosted by BerryDunn. **In-person:** 9 a.m.,

2211 Congress St., Portland. [Register](#).
Virtual: 1 p.m. [Register](#).

Aug. 14 (virtual)
How Automation & AI Enhance Management Accounting
2:30 p.m., 1 CPE. [Register](#).

Aug. 19 (virtual)
Planning with Tax Advantaged Long-Term Care Insurance
8:30-10 a.m., 1.5 CPE. FREE for members. [Register](#).

– See **CALENDAR**, page 4

MEMBER NEWS

Three great goals: Grow, support, advocate

Dear members,

It's an honor to serve as the new President of the Maine Society of CPAs. As I begin, I want to thank our past President Barbara Belik and dedicated Board members for their leadership and service to our profession.

Having been on the Board for the past three years and currently serving as Co-Chair of our Pipeline Committee, I've seen firsthand the strength of our Society and the passion our members bring to advancing the accounting profession in Maine.

One effort I'm most proud to have been part of is launching the **Team Up to Move Up Mentor Program**. Now in its second year, this program pairs college students with experienced CPAs

PRESIDENT'S LETTER

to offer guidance, support and a clearer path into the profession.

Early feedback has been overwhelmingly positive, and I believe programs like this are vital as we work to build a stronger and more inclusive pipeline of future professionals.

Looking ahead, my focus will be on continuing to grow member engagement, supporting educational and leadership opportunities for CPAs at all stages of their careers



Jake Black

and advocating for policies that protect the integrity and value of our profession.

I also hope to hear from more of you – your input and involvement are what make the Society thrive. So please be on the lookout and join us at one of our many upcoming summer events.

Whether you're a student just beginning your journey, a young professional finding your path or a seasoned CPA sharing your knowledge, there is a place for you here. Let's continue working together to strengthen the accounting community here in Maine!

Thank you for the opportunity to serve. I'm excited for what's ahead.

– Jake Black, President,
Board of Governors



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Questions? Call Stephanie: 714-332-0140

MEMBER NEWS: THANK YOUs



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Let's do great work together.
800-734-6880



MECPA.org



Volunteers from BerryDunn (above) and Freeman & Company help out at the Husson ALIVE! program in May in Bangor.

Thank You!

We appreciate everyone who helps the MECPA fulfill its mission. These recent volunteers were especially generous:

All mentors in the inaugural Team Up to Move Up Mentor Program: Shehzi Ansari, Matt Barbour, Kasey Bull, Leah Clair, Derek Collin, Ryan Dawson, Laura Everett, Rob Gould-Wettmore, Jay Grant, Stefan Lange, Ben Lewis, Elizabeth McCarthy, Kirin Schrum, David Stone, Tabitha Swanson and Sam Wartenberg. We hope many of these mentors return for Year 2, and we welcome new ones!

Volunteers at the Husson ALIVE! program for high school students. Thanks to BerryDunn and Freeman & Company for sponsoring the event. From BerryDunn: Jake Abbott, Jake Black, Alex Daigle and Bess Whitney; Freeman & Company: Justin Freeman, Jill Black, Donna Oxley, Mike Jones and William Patin

YETI cooler donation: Ken DeSimone (congrats to winner Shehzi Ansari!)

All who helped to ensure children weren't hungry during April school vacation week via The Locker Project's efforts. Sharing this from the organization's Executive Director Kathryn Sargent:

"Just a quick note to thank you for donating to our 4th Annual Mac 'n Cheese Drive! This year's collection effort was a huge success. We had more than a dozen new partners and collected twice as much as last year. ... The tally currently stands at 11,380 boxes and 2,989 cups. That's roughly 35,000 servings of mac 'n cheese!"

"We still have an enormous supply on hand. This incredible community support means we'll be able to keep sharing this kid favorite with hundreds of Greater Portland families in the coming weeks."

MEMBER NEWS: COMING UP ...

Having a ball!



Board member Kirin Schrum, left, and Executive Director Trish Brigham enjoy a friendly Skee-ball competition earlier this month at Arcadia in Portland. Kirin is member of the MECPA's Difference Makers Committee, which organized the get-together as well as other upcoming social events. (Check them out at right.)

Interested in sponsoring an event? Please reach out!

Generous sponsors allow us to host events like the ones at right and our Annual Meeting (Payroll Management, Inc., Human Interest, Cambridge Trust and UWorld for our May 2025 event). Sponsors reduce our costs and make more great experiences possible. If you're interested in becoming a sponsor, we'd love to hear from you. Please [email Trish Brigham](#).



Mark your calendars

(continued from page 1)

Aug. 26

LIVE VIRTUAL SESSION: Overview and Analysis of the New Tax Law: Part 1 – Individual Taxation

Presented by Surgent. 9 a.m.-12:30 p.m. Hosted by the Massachusetts Society of CPAs. Enter discount code: MULTISTATE1.

[Register.](#)

Aug. 27

LIVE VIRTUAL SESSION: Overview and Analysis of the New Tax Law: Part II – Business Taxation

Presented by Surgent. 9 a.m.-12:30 p.m. Hosted by the Massachusetts Society of CPAs. Discount code: MULTISTATE1.

[Register.](#)

Sept. 16-17 (in person)

Office of the State Controller's Governmental Accounting and Auditing Training

16 CPE, Augusta Civic Center, North Wing. Distinguished lineup of national speakers and the Governmental Accounting Standards Board. Topics may include: Legislative Update, Using AI to Overcome Staff Shortages, Grants Management. [Contact April Newman](#) (April.D.Newman@maine.gov) FMI.

Nov. 5-6 (virtual)

SCORE Tax Forum

FMI and to [register](#), [go here](#).

See Surgent's extensive library of courses and on-site training programs/packages [here](#). And visit [mecpa.org](#), where we frequently update/add offerings.

IN-PERSON SOCIAL CONNECTION

Aug. 9

Soccer match: Hearts of Pine

Portland's newest professional soccer team. 6 p.m. Limited tickets available. [Contact Trish Brigham](#) if interested.

Aug. 21

Fore Fun Golf Scramble

Nonesuch River Golf Club, Scarborough. All skill levels welcome. Extras for MECPA members. (See flier on next page for details).

[Register.](#)

Through Sept. 3

Summer Season of Impact 2025

Keep track of your volunteer hours at any Maine-based nonprofit through Sept. 3, then [send your total hours to Trish Brigham](#). Send photos of your activities to Trish any time as well!

Coming in November

XGolf in Portland and Bowling in Bangor. Stay tuned!





8 a.m. start, 9-hole scramble

Individual-hole competitions and prizes.
Open to all. Extra perks for MECPA members.

Nonesuch River Golf Club
304 Gorham Road, Scarborough

\$75 – includes cart and breakfast;
\$15 box lunch available

[REGISTER HERE!](#)

If you register as a foursome,
one member must [contact Trish Brigham](#) with
player names/contact info. Individual registrants
will be assigned to a foursome.

Brought to you by
the Maine Society of CPAs
and our sponsors:



Just FORE Fun ... Sign up for our Aug. 21 9-hole Scramble

Our X-Golf event last November was as popular as the golf clinic we hosted two summers ago. Accountants evidently love golf, and we've got more for you.

Come to our **Fore Fun Golf Scramble** Aug. 21 at Nonesuch River Golf Club in Scarborough. (See details above.)

We have fun extras for MECPA members and prizes that include the cool Bogg bag at right, generously donated by M&T Bank.

Thanks you to sponsors, Payroll Management, Inc., and Aries Wealth Management.

[Register here.](#)



CPAs-to-be and finance pros: Become an Associate Member

We welcome CPAs-to-be and non-CPA finance professionals who'd like to engage with us. They can reap the many benefits of the MECPA by becoming Associate Members.

Do you know someone studying for the CPA Exam? Encourage them to [join the MECPA](#). They might even win a \$2,000 CPA Review course from Gleim Exam Prep like Danielle Berard of Albin, Randall & Bennett did this month.

BEYOND THE NUMBERS

– Continued from page 1

American Heart Association's annual Heart Walk. In the spring, I look forward to participating in Mary's Walk with my family and friends to support funding for breast cancer research. What I enjoy most about these volunteer events is the opportunity to form connections with new people, partner with colleagues outside of the office for important causes and personally give back to my community in a meaningful way.



Kirsten Lebreux

Best advice you've received? The best advice I received is that everyone has their own plan, so do not worry about what everyone else is doing; just concern yourself with you. Advocate for yourself and take ownership of your career path. Monitor your own performance, seek out your own opportunities, build your own relationships, and listen to guidance from your mentors.

When you have free time, what do you do? I enjoy shopping, hiking, going to the beach and golfing with friends and colleagues. I like to gather with friends and family, try new food venues, and listen to live local music.

Favorite vacation spot? I love exploring my home state of Maine. My favorite vacation spot is Bar Harbor, where I can always count on New England cuisine, scenic hikes and boutique shopping.

MEMBER NEWS: BOARD INVOLVEMENT

Welcome new 2025-26 Board members

STEFAN LANGE

Accounting is a great career because:

The opportunities and number of career paths are nearly endless. As accountants, we're far more than just number crunchers and bean counters – we provide the information that enables businesses and individuals to make informed decisions and achieve success. I wholeheartedly recommend accounting to anyone who is looking for a fulfilling and impactful career.



Stefan Lange

Why I joined the MECPA Board: To give back to the profession. By drawing on my unique experiences and perspectives, I aim to help shape the future of the accounting profession in Maine and support the next generation of CPAs.

Favorite spot in Maine: Baxter State Park – its remoteness and untouched beauty are unrivaled in the Northeast.

MATT BARBOUR

Accounting is a great career because:

The opportunities for growth and career fulfillment in the accounting industry are almost unmatched. Whether you want to be running a firm of professionals, catering to a small group of valued clients or helping run the internal finances of companies small to large, a degree in accounting can take you there.

Why I joined the MECPA Board: The MECPA and Trish [Brigham] in particular have always been very supportive of our practice and pushing for things that benefit our industry across the state. It made sense to lend what I can to helping further the organization's mission.

Favorite spot in Maine: This is a tough one as it depends on what mood I'm in or who I'm with. But if I could only go to one place in Maine one last time it would have to be any of the coastal Harpswell harbors or coves to take in the sights of Maine's beautiful rocky coast.

"I've learned that you shouldn't go through life with a catcher's mitt on both hands. You need to be able to throw something back."

~ Maya Angelou

A little seasonal inspiration for considering getting more involved in your MECPA. All Board committees below welcome new members:

Difference Makers: Networking and social event planning

Pipeline: Promoting the profession, outreach to students

Taxation: Providing expert perspective & advocacy

Innovation & CPE: Learning and professional development programming

FMI: [Contact Trish Brigham](#).



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NOT OPTIONAL.

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FPA New England intent on broadening collaborations

From the Financial Planning Association of New England

FPA New England is a community of financial planning professionals across Massachusetts, Vermont, Maine and New Hampshire.

We're committed to fostering collaboration with accountants and other allied professionals through engaging programming such as coffee meet-ups, Happy Hours, educational webinars, workshops and cross-industry networking events.

We're launching an initiative to focus efforts beyond Boston and bring more events and networking opportunities to professionals across New England. We're excited to build stronger local connections and create spaces where financial planners and accountants can learn from and support one another.

Here's a list of our upcoming events. Details to come:

July 24

Happy Hour: 5:30-7:30 p.m., \$20, Harpoon Brewery, Boston. [Register](#).



Date TBD in August

Happy Hour. Outside Portsmouth, N.H., or Kittery, Maine.

Sept. 25

"Cross Industry/Build Your Client Service Team," Alibi @ Liberty Hotel. [Register](#).

Date TBD in October

Panel or speaker & speed networking at Bentley College

Date TBD in November

Coffee Hour, Portsmouth & Boston

FMI: [Contact Paul Gaudio](#) (pgaudio@crestwoodadvisors.com.)



New MECPA Board member Stefan Lange, left, a mentor in our inaugural Team Up to Move Up Mentor Program, enjoys some tacos and discussion at the University of Maine with his enthusiastic mentee, Ernest Mamphay.

We're excited for Round 2 – Are you our next mentor or mentee?

Our first Team Up to Move Up Mentor Program, through which we match accounting and business college students with working accounting professionals, was a resounding success with 16 match-ups and loads of positive feedback.

Many longer-term working relationships were formed.

We were thrilled to have several mentees attend our Annual Meeting in May, and most walked away with a free CPA Exam review course review thanks to meeting sponsor UWORLD.

We're kicking off Round 2 of the program in September. If you're interested in participating as either a student mentee or a mentor, please [contact Trish Brigham](#).

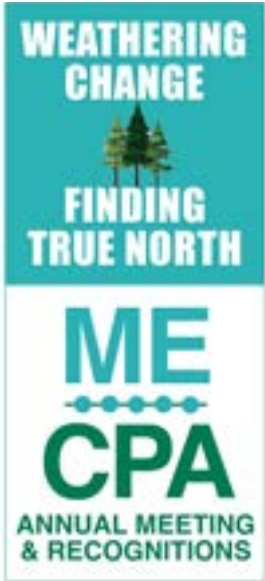


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MEMBER NEWS: ANNUAL MEETING WRAP-UP

2025 Annual Meeting in photos



Top: Attentive participants in Brunswick; middle left: Guest speakers, from left, Jennifer Elder, Bridget Kenneally, Victoria Navarro and Tom Morgan; middle right: speaker Kymberly Messersmith; bottom left: New CPAs, from left: Michael Pingree, Meredith Wicks, Casey Sudbeck and Jonathan Marcotte; bottom right: 2025 Finding True North Award winners, from left: Riley Andrews, Rick Cyr, Marc Powers and Louise Soucy.

We loved hearing this after the meeting!

"I just had a lovely interview with a firm I got in touch with through the Annual Meeting. Thank you for facilitating connections for young professionals. It has been so valuable." – Sarah Shepro



MECPA members Karla Brannen, left, and Bob Grieshaber met in May with U.S. Sen. Susan Collins (R-Maine) during the AICPA Spring Council meeting in Washington, D.C.

AICPA Spring Council report from our reps

MECPA Key Persons Karla Brannen and Bob Grieshaber represented the MECPA at the AICPA Council's Spring Meeting in Washington D.C. in May. They met with Maine's federal legislative delegation and/or staff.

Along with other state CPA Society staff, members and volunteers, they advocated for issues impacting the profession and taxpayers, including:

STEM

Supported legislation that would allow existing K-12 STEM grant funding to be used for accounting education.

Pass-Through Entity Tax (PTET)

Supported retention of the ability for pass-through entities to fully deduct the entity's state and local income taxes on the business at the federal level.

The recently passed federal legislation removes the limit on pass-through businesses' state and local tax (SALT) deductions.

WIN!

529 Savings Plan

Supports the Freedom to Invest In Tomorrow's Workforce Act, which expands the use of 529 savings plans to cover postsecondary credentials. This was included in the recently passed federal tax bill.

WIN!

Disaster relief

Supports the Filing Relief for Natural Disasters Act which allows postponement of federal tax deadlines for taxpayers affected by a qualified state-declared (by the state's governor) disaster. The House passed this bill earlier this year, and was approved by the Senate last week.

WIN!

Advocacy results: A mix of successes and back to the drawing board

The past six months have seen an incredible level of advocacy work on behalf of the CPA and accounting community. Issues have run the gamut from CPA Exam eligibility to PTET credits.

[Go here](#) for an archive of members-only Legislative Updates.

CPA Licensure:

Thanks to forward-looking activism by state CPA Societies around licensure pathways, the AICPA and NASBA approved changes to the Uniform Accountancy Act (UAA).

These changes will:

- Enable states to adopt a third licensure pathway (earn a bachelor's degree, complete two years of professional experience, and pass the CPA Examination).

- Shift to an "individual-based" mobility model, which allows CPAs to practice in other states with just one license.

- Add safe harbor language to ensure CPAs who meet existing licensure requirements preserve practice privileges.

The UAA Ninth Edition will be released this summer, and adoption timeframes will vary by jurisdiction. Nearly 30 states have passed legislation accommodating alternate pathways to licensure. [Go here](#) to see an update of legislative activity around the country.

The MECPA submitted a bill to introduce alternative pathways, but it was rejected by the Department of Financial & Professional Regulation. We'll continue to work with OPFR staff to address the issue of

alternate licensure pathways in Maine. The MECPA successfully lobbied for a bill that led to CPA Exam candidates being able to take the Exam with 120 credit hours, instead of 150. This bill goes into effect in September.

[This article](#) in CFO Dive provides additional context for our advocacy work around licensure.

Maine State Tax

We continue talking with Maine Revenue Services. MRS took into consideration our feedback on their amendment to Rule 801, Apportionment, by minimizing its complexity and removing the sourcing phrase.

It was replaced with "where the services are received."

Pass-through Entity Tax & Tax Credit was another issue we urged MRS to take action on.

Maine is one of only 14 states that does not allow PTET credits. PTETC were adopted after TCJA's cap on State and Local Tax (SALT) deductions.

The MECPA was joined by several other business groups in Maine, including the Maine Manufacturers Association, the Maine Chamber of Commerce and the Retailers Association, but the bill was ultimately tabled and will be carried over to the next legislative session.

Given the changes in the 2025 federal tax bill, we'll be monitoring action by Maine Revenue Services, in an effort to support conformity with the federal tax code, as appropriate.

Interested in joining the MECPA's Tax & Advocacy Committee? Contact Mike Santo at mike.santo@wipfli.com or Trish Brigham at trish@mecpa.org.

ADVOCACY

Shaping the future of accounting – let your voice be heard

In addition to advocacy work that was the primary focus of the Spring Council meeting in Washington, D.C., the AICPA unveiled its **Finance and Accounting 2040: Rise to the Future Together** initiative.

A key part of this national effort are Future Forums, facilitated conversations designed to surface bold ideas, explore disruptive trends and spark innovative thinking to co-create a shared vision for where the profession needs to head by the year 2040.

It's important for as many professionals as possible to be engaged in this process of envisioning the future of the account-



ing and finance profession.

The MECPA will host several discussion forums over the next few months, in virtual and in-person formats.

The first, for southern Maine members,

is Aug. 13.

Shaping the Future of Accounting, hosted by BerryDunn, will be held in two parts.

An in-person session is set for 9-11 a.m. at BerryDunn's office in Portland (2211 Congress St.) [Register here](#).

The second, at 1 p.m. that same day, is a virtual discussion. [Register here](#).

Plans for an in-person discussion in northern Maine are in the works.

Additional forums will be communicated via email and the [MECPA website](#).

Interested in hosting one of these sessions? Please reach out to [Trish Brigham](#).

LEADERSHIP

"People don't quit jobs, they quit managers." This familiar phrase highlights the critical importance of effective leadership in an organization's retention strategy. Good talent management remains a top concern for the accounting profession, making investment in leadership development a valuable proposition.

Women's Leadership luncheon

BEE BOLD, Aug. 5, 11:30 a.m.-1 p.m., South Portland.

We're excited to partner with NBT Bank and QueenBEE Networking group to host an event aimed at building connections and confidence for current and rising female leaders. [Register](#).

Put away those stereotypes

Women Leaders have an extra challenge in overcoming stereotypes.

[Read about it here](#).

5 positive Leadership Points

Provided by [Fearless Foundry](#)

Here are five ways to practice allyship rooted in real relationship-building:

1. Lead with listening, not assumptions. Ask, invite, and honor someone's experience. Listening means letting go of the need to be right.

2. Use your privilege to uplift, not

overshadow. Make introductions. Share credit. Amplify, don't override.

3. Practice inclusive language. Words shape belonging. Respect pronouns. Learn terminology. Correct mistakes with humility. Be the kind of leader who shows that learning is always welcome.

4. Interrogate systems, not just behaviors. Surface-level inclusion isn't enough. Ask how hiring, pay, and leadership practices affect who gets seen, heard, and supported.

5. Show up when it's hard and stay consistent. Advocate without needing applause.

PIPELINE

Add your chapter to the Great Accounting Career Story!

As we savor the sweet summer months in Maine, fall seems a long way off.

But alas, as happens every year, the lazy days of August quickly give way to the hectic pace of the fall/back to school season.

This fall, the MECPA literally heads to campus as part of its many efforts to promote the accounting profession and attract new talent. Here's a look

at our fall 'syllabus:'

Team Up to Rise UP Mentor program

Pairing working professionals with accounting and business majors. We had 16 students in 2024, and we have plans to grow during Round 2.

On-campus Accounting Awareness events

For high school students interested in accounting. Details

coming soon for programs at St. Josephs College and Southern Maine Community College in November.

Accounting ELO, Experiential Learning Opportunities and series

Firms and businesses host high school students who are interested in learning more about accounting career opportunities.

Campus Career Fairs

Take us along when your firm attends these sessions.

High School classroom visits

If you, your colleagues or clients with accounting backgrounds would like more information and/or to get involved [contact Trish Brigham](#).

Our efforts are more effective and provide the greatest pay-back with your involvement.



Peonies for sale at a roadside stand in Bath. – Patricia McCarthy photo

Let's remember that pipeline expansion is a team sport

This article, reprinted, with permission from our friends at the Center for Accounting Transformation, reiterates the importance and value of your involvement by sharing your story.

By Donny Shimamoto, CPA, CITP, CGMA

Today's accounting professionals are more than technical experts – we are trusted advisors, strategic thinkers and community leaders. In a world shaped by constant change, accounting has evolved into a profession of impact, innovation, and purpose. At the Center for Accounting Transformation, we believe it's time the world sees that, too.



Donny Shimamoto

That's why we launched the **Agents of Transformation** initiative: to spotlight professionals who are using their skills, leadership and creativity to make a positive impact through accounting.

We have been especially proud to partner with the state accounting associations, whose support and participation has helped us amplify these stories and inspire the

next generation of change-makers.

Why We're Doing This

The accounting profession is at a crossroads. Demand for accounting and advisory services continues to rise, but fewer students are majoring in accounting. Too often, accounting is misrepresented as nothing more than number-crunching and spreadsheets.

We know the truth: Accounting is about problem-solving, building trust, shaping sustainable businesses and accelerating innovation.

Through **Agents of Transformation**, we're working to reshape perceptions. We're showcasing real people—taking both traditional and non-traditional paths – who are driving progress, strengthening communities, and creating new opportunities.

By highlighting these stories, we can inspire the next generation to see the accounting profession not just as a career, but as a platform for making a difference in our world.

Your Role: Why We Need You

We're looking for both accounting professionals and other professionals working at accounting firms who are ready to champion the future of our profession. By joining the **Agents of Transformation**

network, you'll:

- Inspire students and career explorers with your journey and leadership.

- Help reframe what it means to be an accounting professional – moving beyond stereotypes to showcase the real opportunities the profession offers.

- Help non-accountants see how they can #improvethe-world by working at an accounting firm.

- Support a vibrant, diverse, and forward-looking future for accounting and finance.

You don't need to be a CFO or tech guru to make a difference. Whether you're a staff accountant, a CEO, or even a marketing manager in an accounting firm – your story matters.

As an **Agent of Transformation**, you have the opportunity to show others what this profession is really about: purpose, impact, and possibility. If you care about shaping the future of the accounting profession and want to inspire the next generation, all it takes is your story.

Spirit Behind the Movement

Transformation isn't just about technology or trends – it's about people. It's about embracing collaboration, innovation, responsibility, and resilience.

Rooted in values like responsibility and accountability, family and community, and unity and harmony, this movement calls on all of us to lead with heart and purpose.

For those of us in the accounting profession, this initiative is a chance to live those values – by sharing stories, advocating for belonging, driving innovation, and leading with integrity.

Whether you're championing sustainable business practices, embracing new technologies, or mentoring future professionals, your actions help shape a profession that is as ethical and adaptive as it is impactful.

Together, we can create a profession that is more universal, more innovative, and more inspiring than ever before.

Let's move forward, knowing that every story shared and every effort made contributes to a future where accounting empowers individuals, builds business resilience, strengthens communities, and drives meaningful change.

Join our Mission

If you're ready to be part of the change – we invite you to join our mission. Help students and professionals see the full potential of a career in accounting.

[Go here](#) to learn more, share your story, and become an **Agent of Transformation**.

INDUSTRY NEWS



A peaceful, gray evening at Scarborough Beach. – Patricia McCarthy photo

A strategic framework for AI adoption in CPA firms

At our Annual Meeting in May, Jennifer Elder presented a great session about AI adoption strategies that minimize risks and maximize rewards. She delves more deeply into this timely topic here:

By Jennifer Elder, CPA, CSP

In an industry built on precision, trust and compliance, artificial intelligence can feel both exciting and daunting. Yet, firms that strategically embrace AI can significantly improve efficiency, reduce errors, uncover insights and enhance client service.



Jennifer Elder

For CPA firms, adopting AI is no longer optional – it's imperative. To navigate this journey with confidence, rather than delay or chase after the latest app, firms should follow a structured approach.

Here's how accounting firms can adopt AI strategically and sustainably

1. Define your AI vision and goals

Start with strategy, not technology. Align your AI adoption goals with your firm's broader business objectives, whether that's increasing efficiency, enhancing quality, reducing costs or improving client experience.

Key questions to ask:

- What are our firm's strategic priorities?
- What problems or inefficiencies does AI have the potential to solve?
- Are we aiming to boost productivity, reduce manual work, improve accuracy, or deliver faster insights?

Practical Tip: Identify a few critical pain points. These could be bottlenecks in workflow, repetitive tasks or areas where client service is lagging.

2. Assess readiness and capabilities

A successful AI implementation de-

pends on both technological infrastructure and human readiness.

Evaluate:

- Current data infrastructure: Do you have clean, structured and accessible data?
- Staff mindset and skills: Is your team open to change? Do they need training in AI literacy?
- Cultural and regulatory barriers: Are there hesitations around automation or concerns about compliance?

Key questions to ask:

- What's our level of AI maturity?
- What training or support would help staff embrace AI tools?
- Are our cybersecurity and data governance practices robust enough to support AI use?

3. Identify high-impact use cases

This is where opportunity meets practicality. The best use cases are:

- Painful (they solve a real problem),
- Practical (they're feasible with existing data) and
- Profitable (they deliver a clear ROI).

Methods:

- Survey staff to uncover inefficiencies and repetitive tasks.
- Observe manual processes that slow decision-making.
- Look at what similar firms are doing with AI.

Quick win examples from the field:

- Transaction matching: Use AI to match GL transactions with receipts or bank data.
- Variance analysis: Auto-generate commentary for financial variances.
- Expense management: Detect fraud, auto-categorize expenses and speed up approvals.
- Chatbots: Answer FAQs for internal finance or client queries.
- Contract review: Use AI to extract

terms and flag risks in legal documents.

Key questions to ask:

- What tasks are repetitive, error-prone or time-consuming?
- What AI tools could automate or assist with these tasks?

4. Create a business case

Even the best AI ideas can stall without a compelling case. For each potential project, evaluate:

- Risk: Operational, financial, reputational, legal.
- Cost: Initial investment, training, maintenance.
- Timeline: How quickly can it be implemented?
- Governance: Who owns it? Who monitors it?

Tell a story:

- Why this? Explain the pain point and the opportunity.
- Why now? Highlight industry trends, competition, or client demand.
- What's the benefit? Quantify expected improvements in hours saved, accuracy gained or revenue growth.

Key questions to ask:

- Who are the key stakeholders?
- How will we measure success?

5. Mitigate risks

AI introduces legal, ethical, and security concerns. Before you deploy:

- Compliance: Understand how AI fits within regulatory frameworks.
- Security: Ensure sensitive financial and personal data is protected.
- Ethics: Avoid bias in algorithms and maintain transparency in how AI decisions are made.

Key questions to ask:

- Who will oversee AI governance?

– See AI, page 13

AI STRATEGIES

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- How will we ensure compliance with evolving standards?
- How will we monitor for unintended consequences?

6. Implement a pilot project

Don't try to transform the entire firm overnight. A low-risk, high-impact pilot lets you learn, adapt, and build momentum.

Steps:

- Select a small team and a contained project.
- Set clear KPIs, such as time saved, accuracy improvements or reduction in turnaround time.
- Define roles and usage policies.
- Test and gather feedback.

Pilot Project Ideas:

- Implement AI in one department, such as AP automation.

- Test an AI assistant to draft internal reports.
- Use Copilot in Excel or Power BI to summarize dashboards.

Key questions to ask:

- How will we track performance?
- What feedback will we collect?
- What does success look like?

7. Evaluate, adjust and scale

After the pilot, conduct an After Action Review with the team.

Debrief:

- What worked?
- What surprised us?
- What could be improved?

Scale thoughtfully:

- Expand successful projects firmwide.
- Select the next use case.
- Continue building a culture of experimentation and improvement.
- Don't forget to celebrate wins. Rec-

ognition fuels momentum and fosters a change-positive culture.

Key questions to ask:

- What should we do differently next time?
- What is the next most promising opportunity?

Final thoughts

AI adoption in CPA firms isn't about replacing accountants—it's about empowering them to focus on analysis, insight, and strategy.

With the right roadmap, even traditionally conservative firms can innovate responsibly.

Start small, think big, and scale smart. The firms that will thrive in the coming years are those that embrace change with purpose.

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Speaking of AI ... how are firms using it?

According to CPA.com, one area seeing rapid growth is AI-assisted tax preparation, with some firms reporting over 80% automation of individual return preparation.

Another important trend, some of you may have already encountered, particularly when evaluating the 2025 federal tax bill, are domain-specific AI-models, like Blue J. [Read more](#)

Aligning data with processes

Accountants, like most business professionals today, are awash in data.

But more, isn't always better.

As [this article](#) indicates, collecting data that can inform strategic growth

and decision-making, the four Ws and one H should be considered: when, why, where, who and how. Innovative operating processes, may be a positive byproduct of this analysis.

Private equity: the new cowboy in town

Private Equity firms are expanding their reach into the public accounting space, often providing welcome financial support for investment in technology and human resource management.

As [this article](#), originally published

by NASBA, and reprinted with permission in the Nebraska State CPA Society newsletter, discusses, adaptations to organizational structure will likely be required, to maintain the integrity and independence public accounting firms are known for.

And further on audit independence ...

Participate in the AICPA Audit Benchmark survey and receive some great feedback to inform your firm's

audit transformation strategy. The survey closes Aug. 8. [Go here](#) for the survey.



Here's to finding a bit of zen this summer, as this Peaks Island garden statue seems to be demonstrating. – Patricia McCarthy photo

NEWS FROM ANOTHER NORTHERN NEW ENGLAND NEIGHBOR



VTCPA Annual Meeting

The Vermont Society of CPAs held its 2025 Annual Meeting on May 29, bringing together members, students, and special guests for a day of updates, recognition, and professional insight.

Highlights included the election of the 2025–2026 Board of Directors, with Kevin Markowski stepping into the role of Chair. The Board thanked outgoing members Tim Keefe and Mark Dayvie for their contributions and welcomed new members Karen Bartlett, James Manning and Nate Lalonde. Members also honored Frank Cody for his outstanding service as a longtime VT CPA volunteer and advocate as the AICPA Council representative.

The meeting featured updates on legislative advocacy, financials, and new Society initiatives, including the launch of an Emerging Leaders Committee and expanded student outreach. Attendees also heard from featured speakers Jennifer Elder and Mathew Barewicz, and closed the day with a member raffle and reception.

