



PKF Mueller

**A YEAR
IN REVIEW
2022**

2022 OVERVIEW

1 LEADERSHIP CHANGES

Effective January 1, Jeffrey A. Delheimer was appointed President of PKF Mueller, while David J. Nissen continued as the Firm's CEO.

2 PARTNER PROMOTIONS

Get to know our newly elected Partners:



Kevin J. Bissell, CPA

Kevin is the leader of the Firm's Government niche with over 25 years of public accounting experience working with municipalities, school districts, districts, and other special-purpose units. This experience allows him to effectively perform, review, and supervise various audit and tax client engagements.



Patrick J. Conwell, CPA, CCIFP

Patrick has over 17 years of experience providing professional auditing experience, assisting clients with Internal Audit services, reviewing and supervising audits and financial statements, and other consulting engagements. He is also on the leadership team of the Firm's Construction and Private Equity niches.



Gregory A. Mills, CPA

Greg has over 26 years of public accounting experience with extensive experience in attestation services, providing audit, review, and other consulting services to various closely held companies. He also specializes in Employee Benefit Plan Audits.



Aaron J. O'Connor, CPA

Aaron has over 25 years of public accounting experience, providing high-level assurance and advisory services, including transactions and IPOs. He contributes deep GAAP knowledge and significant SEC reporting experience to the Firm.



Christopher J. Gent, CPA, CISA

Chris has over ten years of public accounting experience providing assurance, accounting, and consulting services, including CFO, controllership, and outsourced accounting services to clients in various industries. Gent's background gives him a firm grasp on changing generally accepted accounting principles for US GAAP and IFRS reporting.

2 PARTNER PROMOTIONS (CONT'D)



James Hare III, M.A.S., CPA

For the first nine years of his career, James worked closely on audit and review engagements, specializing in auditing 401(k) plans. In 2022, he joined the Client Advisory Services Department and is heavily involved in the Firm's Philanthropy efforts.



Alex Krog, CPA

Alex joined the Firm in 2012 and is a leader in the Employee Benefit Plan Audit group. Recently, his focus has been in the private equity area, having performed extensive work on both buy and sell-side due diligence for transaction engagements.



Joseph A. Kostro, CPA

Joe has over 16 years of public accounting experience, specializing in audit, accounting, and tax services for commercial entities and not-for-profit organizations. He is a leader in the Not-For-Profit niche and often speaks at educational seminars.

3 OFFICE MOVES

We moved office locations in Orland Park near the end of 2021 and celebrated with an open house in the summer. Our Sarasota office was also moved to a new location, effective December 5, 2022. Be sure to update your records with our new addresses:

**15303 S. 94th Avenue, Suite 200
Orland Park, IL 60462**

**2601 Cattlemen Road, Suite 502
Sarasota, FL 34232**

4 PODCASTING

Check out our debut series, *Business Owner's Guide: Tips, Trends, and Talks from a CPA*, featuring over 20 episodes on hot-button topics for entrepreneurs and business owners. Also included are conversations dedicated to State & Local Tax.

In addition, we recently launched *The Partner Series: Developing Strategic Partnerships for Client Success* to introduce clients to our various value-added services offerings.

Listen to either podcast on our website, Apple Podcasts, Spotify, or wherever you get your podcasts.

5 CLIENT EDUCATION

Many webinars and workshops were hosted to share valuable knowledge with our clients:

- Do You Qualify for the Employee Retention Credit?
- Not-For-Profit Accounting Updates
- LeaseCrunch: Expedite Adoption of the New Lease Accounting Standard
- Nonprofit Business Considerations When Hiring Talent & Doing Business Abroad

Did you miss our live webinars?

Watch our webinars on-demand on our website or YouTube page.

<https://www.pkfmueller.com/insights> or @MuellerCPA on YouTube

6 EVENTS

We were once again pleased to host our annual Illinois and Sarasota Client Appreciation events, and Chicago Mixer.

7 SOCIAL MEDIA

We launched the official PKF Mueller Instagram page in early January! Follow us @pkfmueller.

8 AWARDS



Top 127th largest CPA firm and on the "Firms to Watch" list



Best Place to Work in Illinois for 12 consecutive years



Best Place to Work in Chicago for two consecutive years



Beyond the Top 100: Firms to Watch



Managing Partner Elite

PKF Mueller CEO, David J. Nissen, CPA/ABV, CVA, was named one of the 2022 Managing Partners Elite by *Accounting Today*. This award honors the ten best leaders of public accounting firms of all sizes across the country.

A MESSAGE FROM OUR PRESIDENT

I want to take this opportunity to thank all our clients and colleagues who have helped make our firm's success possible.

As I reflect on the past year, I am proud of the progress we have made as a firm by continually growing our client base and expanding our services. Despite the economic downturn, we have also made significant investments in our people, technologies, and infrastructure.

Coming out of the COVID-19 Pandemic, we spent a good portion of our efforts assisting many clients with the Employee Retention Credit (ERC) by providing guidance on updated qualifications and how to maximize their credit. We can expect that there may be similar opportunities from here on.

Looking ahead to 2023, we are focused on continuing to provide the highest quality service to our clients and continuing to invest in the three items mentioned above. All are essential and are how we will meet our clients' needs due to technological changes, industry standards, government regulations, and future business landscapes.

Again, thank you to our clients for their continued support, and we look forward to continuing to serve you in the future.



A handwritten signature in black ink that reads "Jeffrey A. Delheimer". The signature is fluid and cursive.

Jeffrey A. Delheimer, CPA
President

PKF Mueller

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