

NEWSLETTER



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GREAT NIGHT at our Annual Meeting

Huge THANK YOU to all of our sponsors! A special THANK YOU to all of our students and Pledges, Kymber Messersmith and Kent Absec for joining us and speaking with such inspiration, NH Secretary of State David Scanlan, Samantha Kenny, Jessica Bouchard, Robin Houston, our Executive Committee and our Board of Directors! Can't wait to do it again next year!



2025 Award Winners

President's Award

Cathi Colman, CPA
Saba Colman & Hunt

Volunteer of the Year

Mallory Vincent, CPA
Mason + Rich

Business Firm of the Year

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Marlene Gazda-Hamel Dedicated Employee Award

Christine Chrysafidis, CPA
Leone, McDonnell & Roberts, P.A.



Letter from our CEO Robin Houston

Dear Members,

As we reach the halfway point of the year, I want to extend my heartfelt thanks for your ongoing support and dedication to the New Hampshire Society of CPAs. Your active involvement continues to strengthen our profession and ensure that CPAs remain trusted leaders in financial and business matters across the state.

I'm especially pleased to share an important legislative achievement made possible in part by your advocacy: the successful passage of **House Bill 236**. This landmark bill introduces a long-awaited **"Retired CPA" status**, a significant step forward in acknowledging the lifelong contributions of our members who have stepped away from active practice but remain proud of their professional designation.

The Retired CPA status provides a formal pathway for retired professionals to maintain their identity as CPAs—honoring their careers, supporting their ongoing engagement with the profession, and allowing them to remain involved in Society activities without the requirements of active licensure. This change reflects our collective effort to make the CPA designation more inclusive and representative of the full arc of a CPA's professional life.

HB 236 is a product of collaboration—between NHSCPA leadership, our Tax and Legislative Committee, and many of you who lent your voices during public hearings and discussions with legislators. Your participation made a real impact, and we are grateful for your efforts in helping shape a more responsive and modern regulatory environment for our profession.

Looking ahead, we anticipate additional legislative activity that may affect areas such as licensure and competency pathways, firm mobility, and workforce development. We will continue to keep you informed and advocate for policies that support the future of the CPA profession in New Hampshire.

In addition to our legislative work, we remain deeply committed to **building the CPA pipeline**. We've expanded our outreach to high school and college students through classroom visits, career panels, and partnerships with educators across the state. Our goal is to spark interest in the accounting profession early and provide meaningful pathways into the field. Through scholarships, mentoring, and student events, we're working to ensure that the next generation of CPAs is informed, inspired, and ready to lead.

Thank you once again for being a valued member of the NHSCPA community. Your commitment, expertise, and leadership continue to inspire.

With appreciation,
Robin Houston



Letter from our President Jess Bouchard

Dear New Hampshire Society of CPA's Member,

Welcome to the NHSCPA's Fiscal Year 2026! This year promises to be one full of exciting activity within the Society and the profession. *We are so glad that you are here!*

This past year has seen a flurry of activity across the country, with many states moving forward with new legislation to adopt different requirements for becoming a CPA. These changes aim to increase the pipeline of candidates sitting for the CPA exams. Most recently, the AICPA and NASBA have approved a new CPA licensure path model, highlighting the national recognition that change is needed.

We are working diligently behind the scenes to determine what the proposed legislation will look like for the State of New Hampshire. Our goal is to help open up the pipeline of CPA candidates within NH while keeping requirements consistent with other states to allow for licensure mobility. Stay tuned for more information from the NHSCPA soon. We will seek your input and support to take the next step in allowing more flexibility in becoming a CPA within New Hampshire.

At the Annual Meeting on May 13, 2025, the Membership approved an amendment to the bylaws allowing a student to serve as a board member of the NHSCPA. Annually, a student can be nominated to the board if they meet the eligibility criteria outlined in the bylaws: a student enrolled at an educational institution, demonstrating an active interest in the Society's mission, and registered as a student member of the Society (as further defined in the bylaws). This amendment aims to enhance the board's representation, ensuring the inclusion of the student perspective within the NHSCPA's governance functions.

We are thrilled to welcome Samantha Kenney as the Society's FIRST student board member! Her energy and perspectives will be extremely valuable to the board. As always, be on the lookout for various events, CPE opportunities and other ways to get involved. I personally am looking forward to the Women's Golf Event in September.

Our goal is always to ensure that all CPA's throughout the State of New Hampshire are heard, represented and supported, especially our Members. Please do not hesitate to reach out at any time. Thank you for all that you do for the profession. Here's to the year to come!

My best,

*Jessica Bouchard, CPA, President
New Hampshire Society of CPA's*

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Mergers & Acquisitions Conference 2025



We were excited to partner with McLane Middleton at the 1st Annual **SOLD OUT** M&A Conference at Jimmy's Jazz and Blues Club on June 4th. Numerous panel discussions sharing insights, analysis, and strategies for success in today's M&A market

BIG THANK YOU to Jessica Oliveri, Ellen Boyd, and Mike McLean



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VTCPA

ANNUAL MEETING

May 29, 2025



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.



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OVER THE BORDER – NEWS FROM THE MECPA

Advocating for you is always the No. 1 priority

Kudos and thank you to MECPA Tax Committee members who meet regularly to review tax legislation, testify to the Legislature 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](#) to get involved.



Jennifer Elder



Bridget Kenneally



Kymberly Messersmith



Tom Morgan



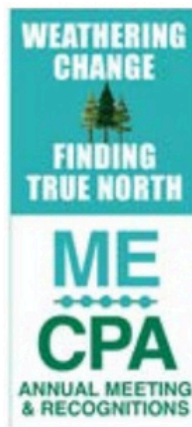
Victoria Navarro

Our Annual Meeting is a sure bet for engaging sessions & great networking

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 Deloitte; Tom Mor-



gan, University of New England business Professor; 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 from 8:30 a.m.-1:30 p.m. at The Brunswick Hotel in Brunswick. [Register here.](#)

Thanks!

As we wind down another membership year, we thank all of our Board members for serving, especially two outgoing members: President Barb Belik and Sam Hornblower, recent co-chair of the Innovation & CPE Committee.

Barb, an educator and attorney, was a valuable asset for our pipeline initiatives. And we'll miss Sam's hard work and abundant enthusiasm.



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

Lively, easy-flowing conversations, lots of smiles and great feedback was the perfect way to celebrate the conclusion of our first mentor program April 17 at the University of New England.

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 consensus was that it was a valuable learning experience for both mentees and mentors – and that many of the work relationships developed will contin-



Participants in the wrap-up of our successful Team Up to Move Up Mentor Program mingle at the University of New England on April 17.

ue 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.

Three Due Diligence Items For Business Owners to Focus on Prior to Going to Market for a Potential M&A Transaction

Written by
Attorney John DeWispelaere

When a business owner decides to go to market and to sell their business, they want to fully maximize the value of their business. One of the best ways to accomplish this is by presenting the cleanest and most comprehensive package to prospective buyers. One item that many business owners fail to do as they prepare for a potential sale is conduct a comprehensive due diligence review of the business. This failure is due to a couple of factors – sellers fail to appreciate the level of detail required by buyers in connection with a sale transaction and do not want to spend the time and money to take on this work until they know they have a buyer in hand. Unfortunately, avoiding the work associated with this review often results in increased time spent addressing issues that will arise when the buyer is doing its due diligence. Having the buyer raise issues that could have been addressed delays transactions (“time kills all deals”) and gives the buyer bargaining power.

We encourage our sellers to think about the pre-transaction diligence process as an investment in their business that will help them achieve a successful sale transaction. If a business owner goes to market without conducting pre-transaction due diligence, there will more than likely be due diligence items that a potential buyer will view as red flags. A buyer will often require that these issues be rectified prior to closing a deal. Buyers may still be willing to transact but at a lesser valuation due to the risk of these flagged items to the potential buyer. Conversely, if a business owner invests in pre-transaction due diligence and irons out any potential flagged due diligence items before going to market, the lack of flagged due diligence will likely instill confidence in the buyer and result in a greater valuation of the business. For example, if a business owner invests in pre-transaction due diligence and presents a comprehensive and clean business package to potential buyers, the business valuation may increase by an additional .5x or 1x EBITDA multiple.

To summarize, the business owner’s investment in pre-transaction due diligence can have a direct correlation to a greater valuation of the business and, at a minimum, avoid renegotiating terms with the buyer or delaying a closing, which in and of itself carries risk.

The three pre-transaction due diligence items we urge our business owner clients to address before going to market are (i) legal due diligence, (ii) financial due diligence, and (iii) tax due diligence.

Legal Due Diligence: Legal due diligence involves: (i) making sure there is a comprehensive and accurate capitalization table that evidences the ownership of the company since its inception.

If there are any gaps in ownership record keeping, we work with our client to close those gaps by documenting the missing corporate records to the extent possible and explaining any gaps that cannot be documented; (ii) reviewing the corporate records to make sure that (a) the business has adopted bylaws or an operating agreement (you would be surprised how often these documents are missing even in a company with multiple owners), (b) it is clear who the directors, officers, or managers of the business are and have been, and (c) the business has documented appropriate authority either by meeting minutes or written consents for all major events that occurred in the business' history – e.g. any change in the company's federal tax status, purchases of other business or the purchase and sale of real estate, or the issuance or redemption of any equity, the merger with any subsidiary, or the recapitalization of the business.

Financial Due Diligence: Financial due diligence focuses on ensuring that the financial statements are consistently prepared throughout the business' history, determining whether the business has any abnormal accounting procedures, and if possible, if the business is not GAAP compliant, the business' exceptions to GAAP. In pre-transaction financial due diligence for middle market companies, it is now standard to obtain a pre-transaction quality of earnings. A quality of earnings is a report that examines the quality and sustainability of the business' earnings – essentially a deep dive into the business' financial statements to assess how earnings are generated, identify any red flags or unusual trends, and determine if the reported earnings are likely to be recurring and sustainable.

Having this information before identifying a buyer results in a high degree of confidence in the company's EBITDA calculation and streamlines the buyer's validation of the metrics underlying the business' enterprise value.

Tax Due Diligence: Tax due diligence focuses on both the business' federal and state tax filings and returns. If the business is an S Corporation, we need to ensure (i) that the business properly elected to be an S Corporation and its corporate records – e.g. operating agreement or bylaws – were updated to reflect this election and (ii) that the business maintained its S Corporation election since its election (i.e. it has not taken any actions that could invalidate this election such as the issuance of equity to a non-eligible shareholder). Regarding state tax returns, we need to ensure that the business has filed, or files, all tax required state tax returns – for example, (a) has the business filed employment tax returns in all states where it has employees, including all remote employees, and (b) has the business filed all state and local tax returns in states where the business earns income.

In closing, although pre-transaction due diligence involves time and expense, business owners should view it as an investment that will undoubtedly facilitate closing a transaction on the best terms and an expedited timeline once it goes to market.



John is a corporate transactional attorney with McLane Middleton, who advises businesses and owners on various transactional matters, including corporate governance, entity selection, contract drafting, succession planning, and mergers and acquisitions.

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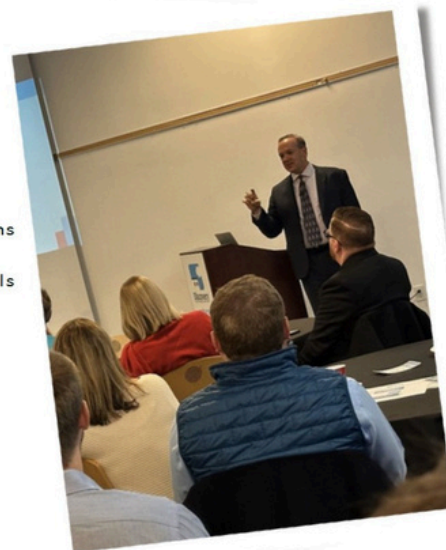
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**A Dedicated letter
by Daniel Hebert**

Senior Director of Education

Jump\$tart Coalition for Personal Financial Literacy



The NH Jump\$tart Coalition is a vital organization dedicated to fostering financial literacy among young people in New Hampshire. Established twenty-five years ago in response to the increasing complexity of personal finance management in today's world, the coalition aims to equip students with essential financial skills that will serve them throughout their lives.

As financial literacy becomes more critical, especially for young individuals facing challenges like student debt, rising living costs, and a constantly changing economy, the NH Jump\$tart Coalition focuses on addressing these issues head-on. The coalition is not only a state affiliate of the national Jump\$tart Coalition for Personal Financial Literacy, but also comprises various local organizations committed to advancing financial education. By working collaboratively with educators, businesses, and community groups, NH Jump\$tart provides a robust platform for developing practical financial skills among students of all ages.

One of the key initiatives of the NH Jump\$tart Coalition is the organization of various programs and events that promote financial education. These programs include workshops, seminars, and interactive activities designed to engage students in real-world financial scenarios. By simulating financial decision-making processes, participants can better understand the implications of budgeting, saving, and spending.

Topics covered in these educational programs are diverse and comprehensive. Students learn about the significance of budgeting, which involves tracking income and expenses to ensure that financial resources are allocated wisely. Understanding the importance of saving is also emphasized, as students discover techniques for building a financial cushion for emergencies, future goals, and investments. The coalition delves into the world of investing, teaching students about stocks, bonds, mutual funds, and the power of compound interest borrowing.

Advocacy is another essential part of the NH Jump\$tart Coalition's mission. The organization actively works to promote the integration of personal finance education into school curricula. Recognizing the importance of equipping students with the skills they need to thrive as adults, the coalition campaigns for state education policies that prioritize financial literacy as a core subject. The good news is that beginning in the 2026 academic year, personal finance will now be a state graduation requirement in New Hampshire.

As NH Jump\$tart continues its mission, it remains committed to inspiring and empowering young people through financial education. The organization believes that by instilling financial knowledge and confidence, they are helping to shape a generation that is ready to face financial challenges and seize opportunities. Through ongoing collaboration and innovative programming, NH Jump\$tart is paving the way for a financially educated future, ultimately contributing to a more prosperous New Hampshire.



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AICPA, NASBA approve new CPA licensure path by Bryan Strickland

approved to post

The boards of directors of the AICPA and the National Association of State Boards of Accountancy (NASBA) approved an expansion of accountancy's model legislation to include an additional path to CPA licensure.

The approved amendments to the Uniform Accountancy Act (UAA) add the option to earn CPA licensure with a bachelor's degree, two years of professional experience, and passage of the CPA Exam.

The UAA will continue to allow CPA licensure with one year of experience, passage of the CPA Exam, and either a bachelor's degree with 30 additional credit hours or a bachelor's degree and a master's degree. All paths require an accounting concentration at either the undergraduate or graduate level.

The new pathway, proposed in March, will be included in an amended UAA to be released early this summer.

Changes to the UAA also include:

- A shift from state-based mobility to an individual-based practice privilege that maintains a CPA's ability to practice across state lines with one license.
- The addition of safe-harbor language that allows CPAs who were licensed under differing education, experience, and exam requirements as of Dec. 31, 2024, to continue to have practice privileges under mobility.

"By aligning our model legislative framework with the laws recently adopted in certain states, we're encouraging removal of outdated barriers and reaffirming our commitment to a truly mobile CPA profession," Sue Coffey, CPA, CGMA, CEO–Public Accounting of the Association of International Certified Professional Accountants, said in a **news release**. "Businesses today demand seamless practice across state lines, and this action provides legislators and regulators with a model under which CPAs can meet that need without disruption. This is how we protect the public while keeping the profession strong, relevant, and ready for what's next."

AICPA, NASBA approve new CPA licensure path

by Bryan Strickland

approved to post

The UAA, jointly published by the AICPA and NASBA, provides state legislatures and state boards of accountancy with a national model that can be adopted in whole or in part to meet the needs of each individual jurisdiction. The updated UAA, according to the news release, maintains that oversight and disciplinary authority over licensees continues with state boards of accountancy.

“NASBA and boards of accountancy remain committed to maintaining public protection while implementing these changes to the UAA,” NASBA President and CEO Daniel J. Dustin, CPA, said in the release. “We will continue to work closely with state boards as the new pathway and changes to CPA mobility are implemented.”

According to the release, the AICPA and NASBA will continue to assist CPAs with navigating practice mobility as states enact legislation.

The new pathway incorporates a broader role for professional experience to be determined at the jurisdiction level. Individual states will need to formally enact legislation and/or adopt rules and regulations, depending on the jurisdiction, before candidates can pursue this path. To date, 14 states have done so.

Associated Links in this article:

[Original Article](#)

[New Pathway Proposed in March](#)

[News Release](#)

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Forbes Top CPA 2025 list!



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Interested? please reach out to Robin Houston at rhouston@nhscpa.org



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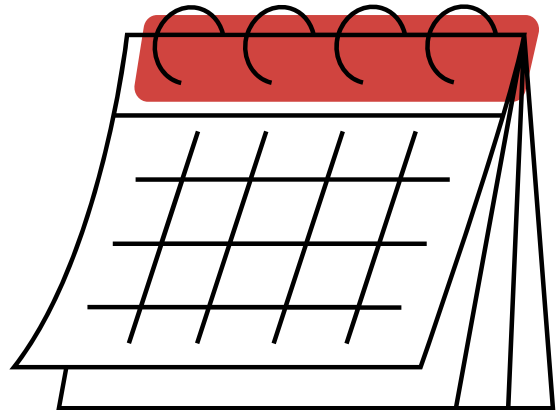
Women's Golf Outing

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