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FOR IMMEDIATE RELEASE:

July 3, 2008

ASSOCIATION FOR ACCOUNTING MARKETING INTRODUCES NEW BOARD OF DIRECTORS

Jamie Trayner to lead organization in 2008 – 2009

KANSAS CITY, Mo. — The Association for Accounting Marketing (AAM) has announced its board of directors for the 2008/2009 term. Composed of some of the leading professional service marketers in North America, the board will help guide AAM's continued growth.

Jamie Trayner – President

Jamie is the Director of Marketing for The LBA Group in Jacksonville, Florida. She leads the firm's vision for growth by directing the client service and marketing efforts for all three LBA affiliates: LBA Certified Public Accountants, LBA Healthcare Consulting Services and LBA Retirement Plan Services. She works with the firm's leaders to ensure premier, proactive client service and mentors the firm's future leaders as they develop their own client and professional relationships. Jamie is involved with identifying and developing new industry and service niches and for facilitating LBA's involvement and support of local community organizations. She also provides LBA clients with marketing consulting services. Jamie has been a member of AAM since 1998 and has served on numerous committees, held several committee chair positions and has been a member of the Board of Directors since 2004. She is also involved in the local Jacksonville community as a member of the Women's Auxiliary Alliance for the Children's Home Society.

Julie Tucek –President-Elect

Julie Tucek is the Marketing Director for Legacy Professionals LLP, a regional certified public accounting Firm headquartered in Chicago. Julie joined the Firm in 1998. Prior to joining the Firm, she was the first Marketing Director (and Marketing Coordinator) at Eggleston Smith, P.C., a regional CPA firm in southeastern Virginia (now Witt Mares). At Legacy, Julie is responsible for managing and coordinating all aspects of the Firm's marketing, public relations, and new business development efforts. She works with her partners and managers to strategize on new business opportunities and works closely with them to generate and close new business. She provides marketing training and coaching at all levels in the Firm. She also has significant experience in collateral materials design and development as well as in tradeshow planning and execution. Julie previously served on the AAM Board of Directors from 2001 through 2004. She is also a member of the Chicago Chapter of AAM. She has spoken at AAM's Annual Conference and at a Chicago chapter meeting on the Proposal Process and Tracking Results and on the 2004 Salary Survey. She has been published and quoted in numerous accounting trade publications including CPA Marketing Report, Practical Accountant, and the Illinois CPA Society's INSIGHT Magazine.

D. Scott Moore – Vice President

Scott is the director of marketing and business development for Dixon Hughes PLLC, the largest accounting firm based in the Southeast. Scott has over 14 years of marketing experience, leading the development of successful programs for companies ranging from small professional service firms to widely known brands such as Michelin. His career has been dedicated largely to marketing financial

services including accounting, financial planning, life insurance and banking. Scott has served on the boards and led the publicity efforts of community organizations such as Safe Harbor (shelter for domestic violence victims) and the Coca-Cola RiverPlace Arts Festival. He also was recognized as one of the "Best and Brightest Under 35" by *Greenville Magazine*.

Marc Busny – Secretary

As the chief marketing officer of Tofias, Marc is responsible for developing and executing the marketing strategy, overseeing the firm's client satisfaction programs and managing its marketing and business development activities. Experiences include new product development, market research, competitive analysis, positioning and business development. He has been quoted by *The Boston Business Journal*, *Worcester Telegram & Gazette*, *Practical Accountant*, *Accounting Today* and *Web CPA*. He has also been profiled by *CPA Marketing Report*. In addition to his many civic and charitable activities, Marc has also taught money and banking in the Chelsea Public Schools as part of the Boston University/Chelsea Schools partnership.

Lora DeSanto – Treasurer

Lora is currently a national marketing director at Grant Thornton, one of the six global accounting, tax and business advisory organizations. Her time is spent managing the firm's strategic relationships and directing several key firm initiatives including institutional acceptance and private equity. Responsibilities include developing and implementing the launch of several key firm initiatives with an emphasis on enhancing the firm's brand awareness among key influencers on Wall Street and throughout the private equity industry. Through her involvement with the firm's national strategic relationships, Lora identifies opportunities for thought leadership including speaking opportunities; by-lined article submissions; and white paper development. Prior to joining Grant Thornton six years ago, Lora worked in the national tax practice at PricewaterhouseCoopers with tax specialty leaders in developing and implementing marketing plans for each practice area. She was a legacy Coopers & Lybrand marketer where she focused on market development for the southeast. Lora started her career at a regional accounting and auditing firm in Philadelphia. She has been a professional services marketer for nineteen years.

Neil Fauerbach – Immediate Past President

Neil Fauerbach has spent most of his career in the professional services field, working with CPAs, architects and engineers. Neil is the director of business development and marketing for Smith & Gesteland, a local firm in Madison, Wis. He is involved in all areas of sales and marketing including research, public relations, sales training, direct marketing, event management, and consulting. Neil holds board positions on several for-profit and not-for-profit companies.

Arthur Kuesel – Member-at-Large

Art specializes in helping CPA, law, and financial services firms meet their strategic marketing, business development, and management challenges. He especially enjoys developing marketing systems and programs that produce significant, measurable and revenue-enhancing results. Previously director of marketing for Brown Smith Wallace LLC in St. Louis, and regional marketer for Wipfli in Milwaukee, Art brings to his work extensive experience in goal setting, program development and ROI enhancement, as well as a solid knowledge of the business side of running an accounting and consulting firm. He excels in helping clients with all areas of marketing, business development and sales. Art holds a degree in marketing and business communications from the University of Wisconsin–Eau Claire. He is a board member of the Association for Accounting Marketing (AAM), which he previously served as a conference chair and speaker, and was involved in the leadership of the Wisconsin AAM Chapter. He has also been a volunteer educator for Junior Achievement.

Katie Tolin – Member-at-Large

As the marketing manager for Rea & Associates, Inc., a regional firm with 11 Ohio locations, Katharine (Katie) A. Tolin leads a team that is responsible for the marketing, business development and public relations of the firm. Since joining Rea in 2003 as its first-ever marketing professional, she has worked to build a marketing culture, expanded the marketing department and is currently helping lead the formalization of industry niches. In addition, she has five years of experience working at a local law firm where, as a single-person marketing department, she led an entire re-branding campaign. For the past

three years, she has served as chairperson of the Association for Accounting Marketing communications committee where she works to elevate the status of the organization to its various publics. In addition, she is chair-elect of the marketing committee of Moore Stephens North America where she has also served on various conference planning committees. As a long time supporter of Junior Achievement, she has served on the community awareness committee of the East Central Ohio organization for the past eight years and volunteers as a classroom instructor. Over the years, she has also served on various fundraising and awareness committees for a number of local not-for-profits. Katie graduated with distinction from OhioNorthernUniversity where she earned a Bachelor of Science in business administration and from EmersonCollege in Boston with a Master of Arts in communications.

Erinn Keserica – Member-at-Large

As the firm's Director of Marketing for Frazier & Deeter in Atlanta, Georgia, Erinn Keserica brings more than 15 years experience in marketing, management, advertising and public relations. She is responsible for planning, implementing and tracking results of programs and campaigns for the firm. She also assists client with marketing communication solutions which include branding, strategic planning and execution, and marketing campaigns. Her unique background includes creative and account management for both agency and client side positions. Specialties relating to her positions involve strategic brand positioning, new product launches, trade show & event planning and production, media relations, organizing and executing marketing and advertising campaigns, and communicating with clients' to optimize results. Prior to joining the firm, she worked for national marketing and advertising firms. Her experience covers strategic work in the areas of consumer packaged goods, retail, restaurant, healthcare, professional services, broadcast media, technology, travel and business to business. She received her Bachelors of Arts in Public Relations from Georgia State University in Atlanta, Georgia.

Kerry Sullivan-Lechner - Member-at-Large

Kerry Sullivan-Lechner is the Marketing Director for Anderson ZurMuehlen. Grown from within the firm, Kerry has brought marketing to the forefront of operations. In her fourteen years of service, Kerry has successfully facilitated the institution of several strategic endeavors combining client service and staff engagement in marketing activities. Kerry is responsible for directing firm-wide marketing efforts, developing and executing the firm marketing plan, overseeing the client satisfaction survey program, and managing firm-wide marketing activities. Kerry works towards shifting the marketing culture at Anderson ZurMuehlen; educating staff at all levels, serving her community, and focusing a large firm located in six distinct communities throughout the northwest region. Her latest challenge has been directing marketing communications, strengthening the firm's brand, and developing the centralized proposal program. She has experience in event marketing and management, market research, and building a marketing culture within the firm. Kerry is actively involved as a member of the Association for Accounting Marketing serving as chair of the Membership Committee from 2004-2007. She serves as a mentor to staff and a role model for employees throughout the firm. Kerry is an active member of the Helena community, volunteering for the Foundation for Animals. She served as the Pet Calendar Project chair for 2007 and 2008 increasing revenues and awareness throughout the greater Helena area.

Alan Vitberg - Member-at-Large

Alan is the Director of Marketing for The Bonadio Group. He has ten years of strategic planning, marketing, sales and marketing communications experience in professional services, combined with over ten years of advertising agency experience. During Alan's tenure he played a key role in helping TBG double in revenue and staff size, and achieve a position as a nationally ranked Top 100 CPA firm. His responsibilities include brand stewardship, strategic and market planning, new product development and launch, staff development and training, web site development and management, and management of all advertising and public relations activities. Alan has been a Finalist for the prestigious American Marketing Association Marketer of the Year Award; he is a two time winner of the Practical Accountant Practice Innovation Award; and is a past recipient of the Marketer of the Year Award from Moore Stephens North America. Alan holds a BA from Case Western Reserve University, and a Master's degree from George Washington University.

Michelle Class - Member-at-Large

As Marketing Director at Barnes Dennig, Michelle is responsible for determining the marketing initiatives

and strategies Barnes Dennig develops to market their full menu of services to existing and new clients. Her primary responsibilities include planning and managing the 20+ seminars designed to educate attendees on the happenings in their industry, and overseeing and improving the four industry-specific compensation studies. Michelle was named to the 2007 Cincinnati Business Courier's Forty Under 40 Class. She is also a graduate of the 2002 Class of Leadership Northern Kentucky and was elected President of her class by her peers. As a community volunteer, Michelle currently serves as Chair of the Hospice of the Bluegrass - Northern Kentucky's first-ever Capital Campaign and is a member of the gala committee. She is also an active member of the Association for Accounting Marketing. As a member of the newsletter committee, she has co-edited several editions of the award-winning newsletter, MarkeTrends. Additionally, in 2005, Michelle was named Volunteer of the Year by this organization – a prestigious award that identified Michelle as a leader of the 620 member organization. She earned a Bachelor of Arts in Organizational Communication, with a minor in Journalism from Northern Kentucky University.

Raissa Evans – Member-at-Large

Raissa Evans is the Senior Manager in the Practice Growth department at PKF Texas, where she has been since 2003. With a background in technology, she brings non-traditional business acumen to the team. She is responsible for assisting the firm's strategic implementation, including project management, campaign development and tracking, niche practice development, budgeting, event marketing, media relations, research, technology directives and pipeline management. A member of the firm's Staff Advisory Committee, the Leading Edge Magazine and PKF University taskforces, she is a key contributor to PKF Texas' internal culture. Working closely with the Human Capital and Technology departments she provides input into shaping programs that will benefit the firm's internal and external clients. She was responsible for leading the development team to launch the company's Web site redesigns in 2003 and 2007, as well as the accounting-technology blog From Greg's Head. As co-founder of the AAM Houston Chapter, she has worked diligently to promote the organization in the Houston marketplace. Supporting AAM at the national level, she has served as a Chapter Development Committee member and now as the second national Board member from PKF Texas, continuing the tradition set by Karen Love. She is actively involved in the community, donating her time to such organizations as the American Heart Association, Center for AIDS, American Marketing Association and the Greater Houston Partnership.

Laura Snyder – Member-at-Large

Laura graduated from the State University of New York at Geneseo in 1992 with a Bachelor of Arts degree in Interpersonal and Organizational Communication. Experienced in both corporate and agency settings, Laura has assisted companies with marketing communications activities for 15 years. She is a member of the PKF NAN SuperMarketer Task Force, which is responsible for developing marketing program for the association's 90+ member firms. She is also the Chairman of the Marketing Committee for ProfitCrew, an association of public accounting firms designed to help construction industry members maximize their operational and financial performance. She is the Secretary of the Financial Institutions Forum, a nonprofit organization dedicated to the education of bank executives. She is active in the Association for Accounting Marketing, serving as the past chair of the Marketing Achievement Awards committee, the current co-chair of the Conference Committee, and as a board member of the Atlanta chapter.

For additional information on the board members or the organization, contact AAM headquarters at 816.221.1296 or info@accountingmarketing.org.

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The Association for Accounting Marketing is the only association in the country formed specifically to address the growing marketing needs of public accounting firms. The members are comprised of marketing professionals, CPAs and consultants, vendors, educators and students who seek to expand the business of public accounting. Since 1989, AAM has provided members with the information, resources and market intelligence needed to excel and grow in their careers.