

CPAs reveal their favorite mentors

11 CPAs weigh in on the teachers, colleagues, and role models who inspired them.

By Cheryl Meyer

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Most CPAs have mentors during their career, and many of these advisers, both informal and formal, offer direction, support, motivation, wisdom — even friendship, which continues for years.

So why do some mentors stand out? We asked 11 CPAs to describe their most influential mentors, and what made them not only significant but also unforgettable. Here are their responses:

Allan Koltin, CPA, CGMA, CEO of Koltin Consulting Group, Inc., in Chicago, believes mentors challenge you, "set you straight when you go sideways, and raise you to a level of performance you can't get to on your own." And that's exactly what **Irwin Friedman, CPA**, former managing partner of Friedman, Eisenstein, Raemer & Schwartz LLP (FERS) did for Koltin, his protégé. Friedman recognized quickly that Koltin thrived in roles involving leadership and development, Koltin said. So Friedman created a position on an alternative consulting track to use his skills. "He saw something there and took a major risk — and mentored me when there was no pathway," added Koltin. "He coached me to excel. It was a 16-year journey."

Charlotte Wall, CPA, joined San Francisco firm Spott, Lucey & Wall Inc. CPAs in 1990, upon graduation from California State University, East Bay. Her experience was so positive and enriching that she never left. "I stayed because I had good support here and did interesting work," she said. That support came from former senior partners **Crista Lucey, CPA** (who still works at the firm), and **Thomas Spott, CPA** (now retired). "On a daily basis Tom encouraged me, and told me what a great accountant I was," she noted. "Crista helped me take the steps to work on leadership skills, and would help me when I was struggling with marketing. I think of Tom as my cheerleader and Crista as my strategist."

David Crenshaw, Esq., CPA, chief financial officer and corporate secretary for audit confirmation company Confirmation.com, in Brentwood, Tenn., remembers the advice he collected from **Jack Kiger, CPA**, former professor and accounting department chair at the University of Tennessee. Kiger, now retired, stressed to Crenshaw the importance of attention to detail, and doing a stellar job at whatever he was asked to do. "He took me under his wing and

picked me as his teaching assistant," Crenshaw said. "He instilled in me the view of being a true servicer of clients. We still trade emails frequently."

Trevor McCandless, CPA, president and founder of Fusion CPA and recruiting firm Fusion CXO, in Atlanta, received valuable counsel years ago from two informal mentors at his prior firm, Metcalf Davis (now Warren Averett CPAs & Advisors): **Bryan Hirsch, CPA**, now a member in the firm's tax division, and **Wayne Williams, CPA**, previously a tax partner and now an independent tax consultant. Hirsch offered McCandless support and helped him develop his own form of entrepreneurialism, and Williams took the time to talk through assumptions and interpretations of things McCandless would read. Williams also instilled in him the attitude to persevere, and to "spend an extra five minutes on something ... to see it through," McCandless said.

Jacob "Izzy" Zuber, CPA, president of Jacob I. Zuber CPA PC, in Brookline, Mass., took 10 accounting courses at Boston University, five of them from World War II veteran **Richard Towle**, a meticulous and effectual professor and a CPA for Pannell Kerr Forster (PKF P.C.) in Boston. "He became my role model in that I also wanted to teach and work," said Zuber, who eventually taught accounting at Salem State University, in Salem, Mass., for a few years. When he later needed career advice, Zuber also consulted with Towle prior to his death in 2007, he said.

Todd Behrend, CPA, principal, international tax, at Ryan LLC, in Atlanta, travels the globe meeting with clients, using expertise he learned in part from **Bill Fowler, CPA (inactive)**, former senior partner with Arthur Andersen, beginning in 1994. Fowler, now retired from public accounting, coached Behrend on how to be a successful international tax adviser. "Bill believed in a need to get on a plane and spend time with clients who were located out of the U.S.," Behrend said. So Fowler soon put him on a flight to Munich and helped Behrend craft a relationship with a German investor whom he still serves, 24 years later. "Bill and I remain friends to this day, and I continue to get guidance from him on various matters," he added.

Kathy Johnson, CPA/CFF, CGMA, owner of CPA Forensics Plus Inc., in San Bernardino, Calif., said she was young and impressionable when first out of college, and was fortunate enough to work for **Jody Lodovic, CPA (inactive)**, then chief financial officer for newspaper company MediaNews Group in Dallas. (Lodovic went on to be president of the company and is now retired.) "He instilled a level of confidence in me that I wasn't sure was there," Johnson said. "He just made me feel important, and was a great teacher."

Chad Allen, CPA/CITP, partner and director of audit & attest services at Hutchins & Haake LLC, in Overland Park, Kan., said his favorite mentor was **David Belpedio, CPA**, who supervised Allen early in his career at MarksNelson LLC, in Kansas City, Mo. (Belpedio is still a partner at the firm.) Allen, then a manager in the assurance and business advisory wing, said Belpedio helped him grow and determine goals in all areas of his life, not just work. "He lit a fire in me every time we would talk," Allen said. "David, more than anyone else, pushed me out of my comfort zone."

Jerry Lee, CPA, CGMA, an accounting instructor at St. Olaf College in Northfield, Minn., gained his inspiration from one of his own college professors. **Dennis "Sam" Erickson**, now deceased, was a professor of tax at Minnesota State University, Mankato, and a national lecturer for the AICPA, per his [obituary](#). He taught Lee the ropes of corporate and individual taxation and made accounting compelling. "He regaled us with all sorts of interesting stories to keep our attention," noted Lee. "The main thing I learned from Sam was: No. 1, how to define a problem; No. 2, where you can get the resources to resolve the problem; and No. 3, that you are not the only solution to the problem."

Adam Pierce Nubern, CPA, 30-year-old owner of Nuventure CPA LLC, operates his accounting practice out of his Casita Travel Trailer, and focuses primarily on clients who live on the road. "Pretty much all of my clients are traveling around the world in a backpack," he quipped. In 2009, Nubern took a job as an accountant at Kiesling Associates LLP (now part of BKD LLP), in Colorado Springs, Colo., where he worked under partner **David Aspenson, CPA**. Aspenson, still a partner with BKD CPAs & Advisors, supported Nubern in his quest to travel, advised him on how to handle stress, and taught him how to treat both clients and employees. "The biggest thing he imparted on me is how important it is to be mindful and in the moment," versus "rushing to do the next task," Nubern said.

Kristin Krauskopf, CPA, founder of her own public accounting firm in Mount Vernon, N.Y., wanted to be a writer or editor, and so she started her career as an intern at *The New York Review of Books* in Manhattan. Not sure where to place her, the company put Krauskopf under the wing of **Norman Stein**, the company's senior accountant. Stein pushed Krauskopf to excel, taught her tenacity and persistence, and convinced her to become a CPA. Stein died in 1981, shortly before Krauskopf graduated from the New York Institute of Technology, Manhattan campus. "I passed the exam on the first attempt to honor him," she said.