MEET THE ADVISORY BOARD

Featured in this Issue: Peter Berlant (pg. 3)

The goal of the Whitman Accounting Alumni Council is to develop a network among Whitman accounting alumni and Whitman alumni practicing in the accounting field. By doing so, we hope to assist alumni in reconnecting to the school and University, specifically the Lubin School of Accounting in the Whitman School of Management.

CURRENT ALUMNI POLL

Q: Who is your favorite famous Syracuse Alum?

A. Bob Costas
B. Dick Clark
C. Betsy Johnson
D. Joyce Carol Oates
E. Donovan McNabb

To vote, copy and paste the link, below, into your web browser:

https://www.surveymonkey.com/s/JXV8XGC

ANSWERS TO LAST ISSUE’S ALUMNI POLL

Q: What are Syracuse University’s “true” colors?

A. Trick Question! Only Orange............... 7%
B. Orange and Blue............................. 36%
C. Orange and Grey............................. 0%
D. Rose Pink and Pea Green.................. 57%

Thanks to those of you who voted!

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STAY IN TOUCH!

To better help us keep in contact with you, please provide us with a personal email – doing so allows us keep in touch with you in the event that you switch jobs and we can no longer reach you at your old address. Also, if you know of any Whitman Accounting Alumni who would be interested in receiving these e-mail newsletters and any other Alumni Council news distributions, please contact Marc Ben-Ami at: marcb@botwinick.com.

Please include the recipient’s name, graduating year, and e-mail information.

ABOUT THE ALUMNI COUNCIL

In an effort to connect the Whitman accounting alumni and Whitman alumni with the University the Accounting Alumni council organizes various activities as described below.
The Accounting Alumni Council organizes various efforts to accomplish our goals. These include the following:

- Provide quarterly e-newsletters distributed to Whitman accounting alumni and students
- Mentor program that matches SU students interested in accounting with an alumni in the industry
- Semi-annual networking events at the Lubin House in New York City
- Periodic social events, including happy hours and tickets to sporting events
- Presentations to students by accounting alumni
- Development and maintenance of the accounting alumni directory
- In addition to organizing the above activities to accomplish our goals, the Accounting Alumni Council has also coordinated fund-raising activities for an annual scholarship benefiting a Syracuse University senior accounting major who is remaining at SU for his/her graduate degree.

### GIVING BACK TO WHITMAN ACCOUNTING

*Fundraising Challenge kicks back up!*

Each year the Accounting Alumni Council works to fund a scholarship to benefit a Syracuse accounting major in their senior year who has elected to obtain a Masters in Accounting at Syracuse University. As we have progressed and evolved, the council has increased our scholarship from about $1,000 in its inaugural year, to $4,925 for the 2014 school year.

Thank you to everyone who participated! With personal contributions, and money raised through raffles and online auctions of donated prizes, we are on our way to providing another scholarship to a prospective masters student. The winner of the 2014 scholarship was Ashley Thombs.

**Congratulations, Ashley!**

For more information on the scholarship or our fund raising efforts, please contact Amy Bacon at amy.m.bacon@us.pwc.com, or Jared Kass at jared.kass@mdly.com.

This year, along with the Accounting Advisory Board, we are kicking off a friendly challenge to the represented accounting firms in an effort to promote giving back to Syracuse University, which has given so much to us.

The challenge is simple: to be the firm with not only the highest dollar amount of donations, but with the highest percentage of participation from Syracuse Alumni employees.

The winner of the firm challenge will be announced at the 2015 Beta Alpha Psi Banquet. We hope a little friendly competition can go a long way in our collective impact to the University.
In the Spotlight: Peter Berlant

As interviewed by Ellen Firth ('09 BS, '10 MS) & Allison Howgate ('07)

Peter L. Berlant, CPA, CFE, CGMA, is the Associate Partner-In-Charge of Anchin, Block & Anchin LLP’s Financial Services Practice and a member of the Firm’s Private Client, Private Equity and Litigation, Forensic and Valuation Services Groups. Peter’s primary area of practice focuses on pooled investment vehicles including investment partnerships and mutual funds. He has spent nearly 35 years advising investment companies, high net worth families, private foundations and middle-market, privately held companies in a wide variety of industries and their principals. In addition, he has provided expert reports, testimony and advice in a variety of commercial disputes and matrimonial matters.

Peter is an active member of the American Institute of Certified Public Accountants (AICPA), having served three terms on the Governing Council. He is also active in the New York State Society of Certified Public Accountants (NYSSCPA) where he served as the inaugural Chair of the Investment Companies Committee and Chair of its Investment Companies Conference. Peter has previously served as the Vice President for Professional Issues and Comment and as a member of the Executive Committee of the Board of Directors of the NYSSCPA. Peter is a member of the Association of Certified Fraud Examiners, the Managed Funds Association, the Hedge Funds Association and the New York Hedge Fund Roundtable.

A 1980 graduate of Syracuse University, Peter continues to be involved through his service on the Advisory Board to the Lubin School of Accounting at Whitman.

Alumni Council (AC): You’ve spent your entire career at one public accounting firm, Anchin, Block & Anchin - why?

Peter Berlant (PB): It’s been a great, varied and fascinating career, working with many wonderful people including my partners, our staff, and our clients. I’ve been given the chance to travel, learn and grow. As the need or interest arose, I’ve taken on new challenges and adapted. Being involved in the profession’s leadership on a state and national level and helping to shape its future from the perspective of our firm and its clients are opportunities which were afforded to me early in my career and continue to this day. I’ve never felt bored, constrained or lacking new challenges. The camaraderie at Anchin is unique. We are like family, and I’ve never found a reason to change.

AC: What would you say the most rewarding aspect of your job is? The most challenging?

PB: There are several in both categories. As to rewards, helping a client to solve a problem, close a deal or plan their business and personal transitions come to mind. Helping to nurture and mentor young people is also very satisfying. The challenges are many, but I look at them as opportunities. Again, finding the solution to a seemingly intractable situation, while mentally challenging, is incredibly rewarding when you succeed. Dealing with negative people, those whose mindset is that it can’t be done, is unbelievably frustrating though turning them around is thrilling. Working with my firm and profession, and the people in it, is both rewarding and challenging. Both have changed, some for the good and some not. We’ve seen an increasing amount of regulation,
not all of which is effective, but all of which affects us. It’s frustrating to see regulation that constrains our clients’ ability to succeed gets in the way of our ability to service them.

The motivations of today’s staff are different than when I started, and we’ve adapted. In the face of the explosion of texting and other impersonal forms, I’m challenged to communicate the importance, in a professional services relationship, of face-to-face communication and strong writing and communication skills, in general. As much as people perceive this as a numbers business, I see it differently; it’s a people business, and we can’t lose sight of that. My goal is to transfer that ingrained understanding to the people coming up behind me before it’s too late. While our firm’s turnover is low, we’ve had very skilled people leave “to try something different” when those opportunities exist here. Our challenge is to understand their motivations and feed them.

AC: What are your goals moving forward in your career? Where do you see yourself in 5 years? Anticipate any changes?
PB: My simple goal is to continue to impart what passes for wisdom, borne from my experience, to the next generation while servicing my clients at a very high level. I want to leave the firm and the profession in the best position I can for the future. After all, I’ll be counting on them to pay me in retirement.

Five years from now I’ll be on a glide path toward that retirement. If I’ve done my job right, I will be nearing irrelevance.

I’ve never been good at predicting change, other than I’m sure it will happen. That said, technology will continue to evolve at breakneck speed, and we’ll adopt it and adapt to it.

AC: You continue to remain involved with Syracuse through Whitman’s Accounting Advisory Board. What would you say the objective of the board is? What are the goals that are most important to you?
PB: Our objective and most important goals are to help keep the accounting education at Whitman competitive and relevant to the needs of the profession. We provide a bridge between academia and the “real world”. While the relevancy of the curriculum is imperative, the teaching faculty is also vital to the process. We provide a forum for confidential, free exchange of ideas and criticism from students to the department and administration. Our mission is to help to make sure the Whitman students are among the best prepared for the challenges they’ll face as they enter the profession.

AC: What do you enjoy most about staying involved with your alma mater?
PB: Meeting each new class of incoming students and watching them grow personally, and in their skills, as they head toward graduation and employment. Having the opportunity to get in front of a class or Beta Alpha Psi, to talk about the profession, my personal experiences or to bring a practical view to the theoretical is invigorating. The long-term friendships with faculty, the administration, fellow Advisory Board members, and former students are a tremendous added benefit.

AC: Do you think Syracuse adequately prepared you for your professional career?
PB: Absolutely, though my Syracuse education was not typical. I was a dual major in Accounting in the School of Management (it wasn’t the Whitman School yet) and Television, Radio, Film in Newhouse. While the accounting and business courses provided a solid foundation for my career, and my Newhouse experience fed my lifelong interest in writing, speaking and communication, the education I got in self-motivation, planning and organization as I ran across the campus several times a day (our Management School classes were in Sims and
In the Spotlight: Peter Berlant (cont.)

Slocum), was invaluable. I learned the value of mental flexibility and a fluid schedule.

AC: When recruiting, what do you look for in an Anchin entry-level accountant? Are there certain qualities you focus on over others? In general, do you think Syracuse students are meeting your expectations?

PB: We’re highly selective in our recruiting, and it’s the intangibles that set the great candidates apart. We walk in with an expectation of a solid education. As you know, GPA is one measure, but not nearly enough. We want people who are self-motivated and have clear career goals. We value long-term relations and are looking for people we believe have the desire and potential to become our partners. We’re looking for people who will add to the fabric of our firm, not just fit in. We see what the candidate did when not in class. Did they get involved in any extracurricular, charitable or community activities? Did they take on leadership roles? Through the years, we’ve been successful at finding enough candidates from Syracuse to want us to keep coming back for more. Our Anchin/Whitman Alumni group has grown and is among the largest pools of talent from any one school within our firm. On that measure alone, yes, the Syracuse students are exceeding our expectations.

& JUST FOR FUN...

1. Dream job (don’t say your current job...)
   PB: Winery Owner and winemaker or Sommelier. Any job which pays you to taste wine all day, though the first is a way to turn a large fortune into a small one.

2. Favorite SU Memory
   PB: Sitting in professor Wessel’s astronomy class with Roosevelt Bouie on one side of me and Louis Orr on the other, then watching them play basketball in Manley Field House; an absolutely insanely loud venue and the beginning of SU Basketball success. My freshman year was Coach Boeheim’s first year as head coach, and I’ve been able to witness it all.

3. If you could go back in time (via DeLorean) and spend a week there, to when would you travel?
   PB: June 28 to July 4, 1776, Philadelphia, PA. I’d be sitting in the gallery of the Continental Congress watching the debate over the birth of our country. (Okay, there was no gallery, but we’re dreaming aren’t we?)

4. If you could meet any historical figure, who would you choose and why?
   PB: Benjamin Franklin. He was an original Renaissance man with varied interests and skills. He traveled the world at a time when few others could. He was a visionary. I would love to engage him in a conversation about his inventions, the sciences, politics, the press and whatever else came to mind.
MENTORING PROGRAM

The Alumni Council Mentoring Program was created in order to provide current Whitman students with a contact in the accounting industry who can be used as a mentor for career preparation in the accounting industry. Examples of discussion topics include: advice on different careers in accounting, tips on obtaining internships/jobs, or general advice on working after college. This relationship should not be used by the student (mentee) to solicit employment from the mentor unless the mentor initiates the discussion. There are approximately 90 Whitman students within the mentor program, with more signing up each semester.

The Accounting Alumni Council is looking for Alumni willing to mentor current SU students majoring, or interested in majoring in Accounting. If you are interested in participating, please contact Cindy Hand, at chand@kpmg.com.

WHITMAN IMPRESS PROGRAM UPDATE

In October, 2013, a group of forty Whitman stakeholders, representing faculty, staff and stellar young alums, came together for an innovation tournament to brainstorm initiatives to develop and educate our undergraduate students to be competent, engaged, ethical business professionals with strong leadership skills. Focusing particularly on “soft skills” and extracurricular experiences, our goal was to develop a program that would ensure that our undergraduates leave Whitman with a sustainable competitive advantage throughout their lives and careers. The IMPRESS program was born!

Launched in fall 2014, every freshman admitted into the Whitman School becomes part of one of four Houses: Adams, Harrison, Marshall and Waverly. Each of these houses have its own insignia and be led by a ‘House Master’, chosen for excellence in teaching, communication and student engagement. These four House Masters guide their 75 –100 students through their first business course at Whitman and encourage them to become engaged in multiple extracurricular activities, for which they will be rewarded with ‘points’. Every year, the House with the greatest points will be awarded the Whitman Cup at an annual celebration. When each student is looking for internships and job opportunities, the employers will be able to see two ‘scores’ on their resume – their GPA and their IMPRESS score.

Below is an update on the program from Adams House Master Professor John Petosa:

“As part of class, the students were exposed to 4 young alums who taught them about the various professions they chose and how they got there. They attended lectures in Whitman where experts in retail management, marketing, leadership, banking and manufacturing all came to share what they think is important for the students to understand as they progress in their academic careers. Outside of Whitman, our students were exposed to the Pan Am 103 Remembrance program and even attended a lecture on forensics by Barry Schenck. The opportunities were abundant for our students to broaden their minds and recognize that they are part of a world-wide business environment in addition to a University wide experience. There are a number of lectures planned for the Spring to continue our growth and development and a Whitman Olympics is being planned to further the competitive spirit amongst the houses. My team continues the climb to the top. The House of Adams is in 3rd place as of right now. I have challenged my house that if we win I would get the Adams logo tattooed on my bicep. So far, my skin is safe!” – John Petosa, Adams House Master
SU SPORTS NEWS

As the 2014 - 2015 basketball season and ACC schedule is in full swing, both the Men’s and Women’s Basketball teams have had a season full of ups and downs. Jim Boeheim and the Men’s team have recently implemented a self-imposed post season ban for the 2014 - 2015 season, amidst an NCAA investigation for improper benefits and rule violations. Although it was a long shot for the Men’s team to make the NCAA tournament this season, this loss of post season play stings specifically for Senior All - Conference player Rakeem Christmas. This ban will end a 6 year streak of tournament appearances for Jim Boeheim and the Orange.

Quentin Hillsman and the Women’s team have a smoother path to the tournament, as the team is currently ranked 23 in the nation, and is poised for a deep run this season.

Even with the rocky starts and a post season ban, we have full confidence in our storied basketball program and successful coaches to bring success to the university on the court this season and in the near future.

Check back soon for more updates on the Syracuse Basketball Program and a preview into the upcoming football season in the next issue of WHITMAN SCHOOL ACCOUNTING ALUMNI E-NEWSLETTER.

WE WANT TO HEAR FROM YOU!

The Accounting Alumni Council would like to encourage you to share any experiences you’ve had with us!

In addition, if anyone has any thoughts about how to improve future newsletters, ideas for presentations, or suggestions on events you would like to attend with fellow alumni, please email us at SU.ACC.Alumni.Newsletter@gmail.com

ACCOUNTING EVENTS

Joseph I. Lubin House Event

We hope you join us at the next Accounting Alumni Lubin House event, scheduled for Thursday, June 18, 2015. As always, we expect the event to be well-attended by a wide array of current and future alumni, as well as several members of the Whitman Accounting faculty. Lubin House events are hosted by the Alumni Council on a semi-annual basis and remain a great way to connect, reconnect, and network with former classmates and fellow Syracuse Accounting Alumni.

Beta Alpha Psi Banquet

The semi-annual Beta Alpha Psi Banquet will be held the evening of Thursday, April 16th at the Genesee Grand Hotel in Syracuse, NY.

If you are interested in attending or would like to receive additional information pertaining to this event, please contact Mitch Franklin, faculty coordinator, at mifrankl@syr.edu.
IMPORTANT LINKS!

Please view the Accounting Alumni Council website at: http://whitman.syr.edu/Academics/Accounting/AAC/

Please view the alumni website at: http://whitman.syr.edu/Alumni/

The Whitman School of Management has a career services page, which includes both career counseling and networking/job postings. If you would like to find out more, visit the Whitman School of Management website at: http://whitman.syr.edu/Career/Alumni/

In addition to the above Whitman Alumni website through Syracuse, here are some additional networking websites:

LinkedIn: SU Accounting Alumni Group: http://www.linkedin.com/e/gis/94224/3F4AE764F16E
Whitman Alumni Group: http://www.linkedin.com/e/gis/95205/62C3F409DE2E

Current Whitman Accounting Alumni Council Members:

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