Anglin Reichmann Armstrong has many things to celebrate. This State of the Firm report provides a brief overview to support firm transparency, recognition of our efforts and context as we move into 2020. Thank you to our team, new leaders, our clients and partners for these successes and new opportunities!

**Growth and Recognition**

For the past year, Anglin Reichmann Armstrong has focused on the integration of our Huntsville, Alabama, and Pensacola, Florida, offices. Our merger with Bloomer Geri & Company in Pensacola, Fla., effective September 1, 2018, was several years in the making, and we are making progress to align our team and strategies. We held our first all-firm retreat with representation from both offices, and we also finalized our firm’s strategic plan! We are unifying our approach to marketing and business development, recruitment, talent development and client service.

**Wealth Management Services Exceeded Growth Averages**

Anglin’s alliance with HK Financial Services (HKFS) through the past year has exceeded expectations. Combined with our insights on clients’ tax and accounting positions, this partnership truly focuses on client goals. And it shows. Business performance was double the average for a CPA firm in year one of offering wealth management services. HKFS has a clear differentiator in their Guidance Planning Strategies (GPS) approach, and our clients really like it.

**Industry and Niche Specialization**

Once again, our firm enjoyed growth in several niche areas of the firm. This includes continued growth in our R&D Tax Credit Studies service line, our comprehensive CFO services through Anglin’s Solutions Services Group, and our industry niche in Government Contracting. We will invest in activities that continue to raise our firm’s profile and reputation in these areas.

**2019 By the Numbers**

<table>
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<th>Firm Revenue Growth:</th>
<th>32%</th>
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<td>Total Employees:</td>
<td>76</td>
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**Best Accounting Firm Recognition**

Speaking of our reputation, Anglin Reichmann Armstrong was one of just 90 U.S. firms named to two top accounting firms lists by Forbes. (Many firms were only named to either the tax or accounting list!) We were named to “America’s Top Recommended Tax and Accounting Firms,” lists based on nominations by corporate clients, enrolled agents, CPAs, CFOs and tax lawyers. Survey analysis included each firm’s depth of services, but also the level of value provided to clients. We are very honored that our clients, peers and other professionals recognized us.

In addition, Anglin was named to Accounting Today’s “Best Accounting Firms to Work For” in their 2019 survey, nominated by employees and compared with firms across the country. We were very proud to be ranked #7 on this list. We were further honored in Alabama as a 2019 Finalist for the Better Business Bureau Torch Award for Ethics. And in Pensacola, we were named in the 2019 Best of the Bay top annual ratings for Best Accounting Firm. See the full awards list in our Marketing and Visibility section of this report.

**Professional Events**

- Hosted Gov Con Growth Summit
- Sponsored NCS Golf Tournament, Orlando
- Attended AICPA G400 Conference, Chicago
- Attended Alabama Society of CPAs 100th Anniversary Annual Meeting and Gala
- ABC Excellence in Construction (Associated Builders & Contractors)

 Managing Partner Gary Anglin represented the firm at the ASCPA 100th Anniversary Gala.
Employee Development

A primary objective in Huntsville and Pensacola is recruitment and staff development. In 2019, we sent eight employees to a comprehensive training opportunity through Unanet and CPAmerica, in sunny San Diego. This involved advanced training in Unanet government contracting software as well as leadership skill building. The Unanet and CPAmerica Next Gen training provided a great way for team members to bond and advance their careers with Anglin.

New staff continue to participate in Anglin’s Pooled Staff Department to provide experience in a variety of engagements and across multiple departments. This approach helps staff build skills and determine where they most want to focus as accountants, CPAs and advisors in the future. Several of our Pool employees were moved or promoted to new positions in the firm last year.

Employee Growth

New Accountant Hires (11)
Christina Bethune – Staff Accountant
Kayla Burgess – Senior Accountant (Rehire)
Kelly Fox – Consultant
Caroline Guinn – Staff Accountant
Laken Hooper – Staff Accountant
Leah Lawrence – Staff Accountant
Whitney O’Rear – Senior Accountant
Sutton Parker – Staff Accountant
Cassandra Sanders, CPA – Supervisor
Erin Sebenick – Process Improvement Lead
Bridget (Michelle) Waller – Staff Accountant (Rehire)

Admin Hires (5)
Hannah Adams - Pensacola Receptionist
David Bier, COO - Pensacola (Rehire)
Sonya Cannon, HR Director
Martina Langford – Tax Administrator
Kami Minor – Solutions Administrator

We work hard to provide new opportunities to our staff and professionals at Anglin, and the following sections note these career and professional successes in 2019.

Community Leaders

Kathy Davis was admitted and engaged in Leadership Pensacola’s LEAP program which is a 10-month-long program designed to identify, foster and inspire current and emerging leaders to gain an understanding of the issues facing the Greater Pensacola area and develop the leadership skills necessary to address them. Anglin’s commitment to identifying leaders that can impact the communities in which we live and work (through Leadership Huntsville & Leadership Pensacola) demonstrates our commitment to lead, serve and give back to the communities that have been so supportive of our business.
Employee Advancement

Promotions
Kayla Burgess – Staff to Senior Accountant
Rachel Bray – Senior Accountant to Supervisor
Blanton Calvert – Staff to Senior Accountant
Christopher Cook – Supervisor to Manager
Kathy Davis – Supervisor to Manager
Rebecca Givens – Senior Accountant to Supervisor
Denise Miles – Manager to Firm Administrator
Lucy Perko – Staff to Senior Accountant
Andrew Turner – Staff to Senior Accountant

New Certifications
- Kelly Fox – Lean Six Sigma, Green Belt
- Megan Van Horn – CPA
- John Prince – CPA
- Caroline Wasson – MBA
- Whitney O’Rear – MBA
- Phillip Williamson – Certified in QuickBooks Online, and QuickBooks Desktop
- Christina Bethune – QuickBooks ProAdvisor for Desktop 2019 and QuickBooks Online

Retired
- Jean Bryan – Administration

New Boards/Professional Achievements

Boards Joined in 2019
- Estate Planning Council, Megan Van Horn
- FICPA West Florida Chapter, Secretary, Megan Van Horn
- Big Brothers Big Sisters of North Alabama, Treasurer, Meg Hampton
- Pensacola Catholic High School, “Building on Faith, Family and Tradition” Capital Campaign, Donna Bloomer

Ongoing Board Service
- Estate Planning Council of NWFL and Leadership Pensacola (LeaP) with the Pensacola Chamber Foundation, Kathy Davis, CPA
- Estate Planning Council, Denise Godwin
- Huntsville/Madison County Chamber of Commerce, David Bier
- HEALS, Inc., Past President, David Bier
- Huntsville Botanical Gardens, David Bier
- Heart of the Valley YMCA, Governance Chair & Annual Campaign Chair, David Bier
- Boys and Girls Club, Board of Directors, Gary Anglin
- Cyber Huntsville, Board and Executive Committee, Gary Anglin
- Alabama Society of CPAs, Chair Ethic Committee, Member Nominating Committee, Gary Anglin
- Alabama Society of CPAs Political Action Committee, Board, Gary Anglin
- Hudson Alpha Institute for Biotechnology, Professional Advisors Council, Gary Anglin
- Friends, Inc. Board, Kavitha Hichkad

Professional Speaking/Presentations
- QuickBooks class, University of Alabama in Huntsville, Deborah Jacobs
- QuickBooks class at University of Alabama in Huntsville, Kandy Gardner
- Accounting & Financial Women’s Alliance (AFWA), A&A Update Meeting, Jason Miller & Meg Hampton
- Accounting & Financial Women’s Alliance (AFWA) annual conference, Accounting & Auditing Update, Meg Hampton
- CPAmerica Leading Partner Conference, Panelist, Gary Anglin
- CPAmerica Regional Conference, Atlanta, discussion leader, Gary Anglin
- Entrecon Conference, Pensacola, speaker, Gary Anglin
- Pensacola Chamber of Commerce, presenter, Donna Bloomer
Marketing and Visibility

Anglin continues to make strides in elevating our name recognition in Pensacola through strategic marketing and public relations. We were excited to win an Association for Accounting Marketing – Marketing Achievement Award (AAM-MAA) for our publicity of the Pensacola merger and firm communications strategy, along with our marketing partner Ingenuity Marketing Group in St. Paul, Minnesota.

Other Firm Awards and Recognition

- BBB Torch Award Finalist – Ethics in Business Practice
- Chamber of Commerce - Small Business Awards Finalist
- “Best of the Bay” Best Accounting Firm Ranking – Pensacola
- Forbes Magazine - Recommended Tax & Accounting Firms
- Accounting Today - Best Places to Work
- Business Alabama - Largest Firms in Alabama
- AICPA G400 - Top 400 firms below Major Firm Group

AICPA George Willie Scholarship & Internship Participation

Anglin was honored to be one of 5 firms in the country chosen to be a sponsoring firm for the George Willie Ethnically Diverse Student Scholarship and Internship program. The program honors George Willie, a former chair of the AICPA’s PCPS Executive Committee and the AICPA Minority Initiatives Committee. Over Willie’s 35-year career, he promoted accounting careers to students and young professionals pursuing the CPA license. Anglin’s pursuit and investment in the program is focused around its commitment and support for diversity and inclusion in our industry.

Camara Strong was chosen as the recipient of the scholarship and internship with our firm. She is a Senior studying accounting at Alabama A & M University and is from Maryland. Following graduation, she plans to attend graduate school to pursue an MBA and plans to work in public accounting.
Community Involvement

The firm donated $200,000 in time to nonprofit organizations during 2019, which involved 820 volunteer hours for the year. These numbers far surpass 2018 thanks to our combined community involvement in Huntsville and Pensacola.

Serve Day

To celebrate volunteerism and give back to our community, Anglin Reichmann Armstrong hosted a ‘Serve Day’ on October 18. The event involved more than 50 professionals from the firm’s Huntsville and Pensacola, Fla., offices. Service activities focused on youth, seniors, animal welfare and nutrition.

Anglin employees, organized in small groups, worked on six different Serve Day projects for four organizations in Huntsville. Anglin’s Pensacola team added a fifth organization and seventh project for Serve Day at the Pensacola Humane Society where they spent time tending to shelter cats, created chewable dog toys and made dog treats.

Activities in Huntsville included projects and grocery deliveries for aging seniors, landscaping and yard cleanup for a pet shelter, hydroponic gardening to provide fresh veggies for families, and spruce-ups at a youth center. Organizations and teams included the following:

**CASA – Care and Assurance for the Aging**
- Yard Work Team – Chris Cook, Capt.
- Grocery/Personal Care Products Delivery Team – Maggie Douglas, Capt.
- Wheelchair Ramp Assembly Team – Leah Lawrence, Capt.

**Greater Huntsville Humane Society**


Manna House
- Hydroponic Garden Care and Planting Team – Caroline Wasson, Capt.

Boys & Girls Clubs of North Alabama
- Fall Festival Cleanup Team – Raven Howlet, Capt.

Pensacola Humane Society
- Treats, Toys and TLC Team – Andrew Turner, Capt.

Aside from the organizations designated in Serve Day, we also supported the following organizations during the year:

HASBAT
HEALS
Heart of the Valley YMCA
Huntsville Botanical Gardens
Alabama Builders and Contractors
Big Brother & Big Sisters
Village of Promise
Friends Inc.
Fantasy Playhouse
Randolph School
Veteran’s Flight (Pensacola)
Catholic High School (Pensacola)
Boys and Girls Club - Leaders and Legends
Hudson Alpha Institute for Bio Technology
UAH - Dr. Gene Bryson Scholarship

Other Community Activities
- Manna House with ASCPA – Hundreds of meals served through our efforts with our local CPA society
- Microwave Dave Day - Sponsorship for blues concert honoring local hero/musician and supporting music education
- Boys and Girls Club - Leaders and Legends
- Free to Teach – donated school supplies to help teachers focus on teaching
- Kids to Love Christmas Angels – providing gifts to area foster kids
- Toys for Tots – Pensacola was heavily involved with donating toys and was a drop off center
- Buddy Walk - Huntsville did a sponsorship of an auction item and Pensacola raised a $1,000
- St. Johns Sunset Run – Church sponsorship race
Team Social Activities

**Field Day** – firm divides into groups and competes in a traditional field day

**Open House** – Anglin hosted an open house for clients and friends

**Tinsel Trail** – city holiday fundraiser in Huntsville, buy a tree and decorate it

**Commemorative Rocket** – painted a rocket through the Huntsville Chamber of Commerce event to celebrate the 50th Anniversary of the moon landing

**Cotton Row Run / Liz Hurley Run / Savage Adventure Race** – local 10K is Cotton Row; 5K for breast cancer awareness

**Maggie Moos Ice Cream Socials** – ice cream truck arrives during busy season and other times for a team break and treats

**Chili Cook-Off** – team members tried to best each other with tasty and spicy chilies

**Fishmas** – partner-supported Captain D’s fish fry dinner

**Thanksgiving Lunch** – an annual firm sponsored potluck lunch for staff and their families

**Christmas Party** – Gary hosted the annual Christmas party at his house, catered by local Chef Boyce. The Pensacola Christmas party is an annual lunch with secret Santa and games
Looking Forward in 2020

We are continuing to focus on our new strategic plan and the opportunities to integrate and expand our team in the Huntsville and Pensacola markets. Through our ongoing talent development and recruitment, award recognition and brand visibility and high value services, Anglin is in a great position to go farther in 2020.