



CERTIFIED PUBLIC ACCOUNTANTS & BUSINESS ADVISORS



EVOLVE 2023

GovCon & Construction Growth Summit

GovCon & Construction Growth Summit Agenda

April 20, 2023

8:00 am – 8:45 am	Welcome, Check-In, Self-Serve Breakfast	
9:00 am – 9:10 am	Opening Remarks – Anglin, Michelle Jenkins , CPA, Partner	
9:15 am – 10:00 am	Major General (Ret.) Vincent E. Boles Topic: Strengthening YOUR Foundation for Growth	
10:10 am – 10:55 am	M&A Panel – Different Avenues for Succession Planning & Where to Start Panelist: Jeremy Mosteller , CPA, Partner Anglin Corey W. Jenkins , Shareholder, Lanier Ford Dustin Mendenhall , Financial Advisor, Avantax Planning Partners Moderator: Ryan Campbell , CPA, CGMA, CVA, MAcc Partner, Anglin	
11:00 am – 11:45 am	Major Changes to Retirement Plans with Secure Act 2.0 – Kevin Dement , Avantax Planning Partners	
11:45 am – 12:30 pm	Lunch/Networking	
	BREAKOUT SESSION	
12:30 pm – 1:15 pm	<i>Owner Panel – Construction – Carriage House</i> Panelist: Jamie Pearman – Early Services, Inc. Sean Lee – Lee Builders, Inc. Jack Fite – Fite Building Company Jimmy Wall – Jesse Stutts, Inc. Moderator: Tiffany Brighthwell – ABC North Alabama	<i>Owner Panel – Government Contracting – Grand Hall</i> Panelist: Larry Lewis – Project XYZ Steve & Alice Lessmann – Signalink Jim Barrett – EthicTech Shellie Mitchell – OASYS, Inc. Moderator: Meg Hampton , CPA, Anglin
	BREAKOUT SESSION	
1:20 pm – 2:05 pm	<i>Leveraging Cloud Platforms Without Risking Reputation</i> <i>Construction – Carriage House</i> Michael Calkins – Egnyte	<i>Is Government Contracting a Slam Dunk for Your Business? – Government Contracting – Grand Hall</i> Leigh Christian & Sonja Greene – The Catalyst Center for Business Entrepreneurship
	BREAKOUT SESSION	
2:15 pm – 3:00 pm	<i>The Power of Meaningful Metrics – Construction – Carriage House</i> Luke Kinzer , CPA, Partner, Anglin LeAnne Goode , CPA, Manager, Anglin	<i>Financial Benchmarking and Tax Credit Considerations – Government Contracting – Grand Hall</i> Christopher Cook , CPA, Partner, Anglin Jessica Cassidy , CPA, Manager, Anglin
3:15 pm – 4:15 pm	Keynote Speaker – Dr. Anirban Basu – Show Me the Money	
4:15 pm – 4:30 pm	Closing Remarks – LeAnne Goode , CPA, MBA, Anglin	
4:30 pm – 6:00 pm	Networking / Happy Hour – Sponsored by Anglin CPA	

Our Speakers



Michelle Jenkins, CPA

Partner - Anglin Reichmann Armstrong, P.C.

Michelle Jenkins is a Partner in our Solutions Advisory Services Department. She joined the firm in 2012 and specializes in government contracting. Michelle earned her Master of Business Administration in 2011 from the University of Alabama at Huntsville. She earned her Bachelor of Science in Accounting from the University of Central Oklahoma in 2008. She helps to tailor forward pricing budget tools and helps improve the capabilities of her clients' accounting systems. She is also called upon frequently to identify and translate key analytics to help contractors track financial performance and efficiently manage their businesses.

Michelle focuses on building key partnerships within the government contracting industry and serves as the voice for women finance leaders, providing insights on future trends that help her colleagues and clients serve the industry well.

Michelle's experience and leadership in the government contracting industry has helped companies achieve growth, compliance, and solid business foundations which makes her the go-to-advisor in this niche.



Vincent Boles

Major General (Retired)

Vincent Boles was commissioned from the ARMY ROTC program at Niagara University as a Distinguished Military Graduate in 1976. He has served in a variety of assignments over a 33-year career, to include Command at every possible level and a number of combat deployments.

His final Army assignment was as the Assistant Deputy Chief of Staff, G4 on the Army Staff in the Pentagon, where he oversaw Logistics Operations and Readiness for the 1.1 million Soldier force to include the surges into Iraq and Afghanistan.

Retiring in 2009 to Madison, Alabama, he established Vincent E. Boles, Inc. A leadership and logistics consulting practice, speaking and working with corporate and association groups around the nation and overseas on the subject of Leaders and their team's "Best Getting Better." His audiences have included: Deloitte; Fidelity; USAA; Ernst and Young; AIG; The United States Secret Service; The Boy Scouts of America and The American College.

He is the author of "4-3-2-1 Leadership... What America's Sons and Daughters Taught Me on the Road from 2d Lieutenant to 2-Star General" Now in its 3rd printing a recent review of the book commented: "He didn't write this book exclusively for the military audience and he does us all a great service by putting these leadership lessons into one volume and sharing them."

In 2011 he was inducted in the US Army Ordnance Corps and Niagara University ROTC Halls of Fame. He serves as an adjunct professor of Leadership and Logistics at the University of Alabama Huntsville and the Defense Acquisition University - South.

Our Speakers



Jeremy Mosteller, CPA, CGMA
Partner - Anglin Reichmann Armstrong, P.C.

Jeremy Mosteller is a Partner in the Tax Advisory Services Department. He has over 20 years of experience in public accounting, and he supports the Firm's management and operations as a member of the board. Jeremy earned his Bachelor of Science in Accounting from Auburn University. Jeremy focuses on client relationship development to understand clients' needs and how the Firm can continually strive to deliver an exceptional client experience. In addition to supporting the Firm's growth and strategy, he also provides tax advisory and consulting services for high net-worth individuals and corporations, provides tax review oversight and technical expertise, and provides comprehensive tax planning and advisory services. He also supports the Firm's Research & Development (R&D) tax practice, provides Employee Stock Ownership (ESOP) services, and assists with wealth management planning. Jeremy's industry focus includes health care and government contracting.



Corey W. Jenkins
Shareholder, Lanier Ford

Mr. Jenkins advises corporate and individual clients on a broad range of business related matters at all stages of the business life cycle. He assists clients with various corporate transactions, such as mergers, stock sales, asset sales, complex licensing arrangements, joint ventures, strategic alliances, employee stock-ownership plans (ESOPs), management buyouts, corporate restructurings, and other commercial and business-related transactions. He also advises clients on estate and gift tax issues and prepares simple and complex estate plans.



Dustin Mendenhall
Financial Advisor, Avantax Planning PartnersSM

Dustin Mendenhall is a financial planning consultant for Avantax Planning PartnersSM. In collaboration with a client's CPA, Dustin provides integrated planning and investment strategies for growing and protecting individuals and business clients' wealth. He designs personalized wealth management solutions by integrating estate planning, risk management, and retirement planning. Additionally, he supports business owners by reviewing their company retirement plans and optimizing for tax efficiency and helps with business transition strategies. His focus is based on each client's unique objectives and priorities. CREDENTIALS Series 66 advisory license. Dustin is a licensed life, annuity, accident and health insurance agent.



Stephen Armstrong, CPA
Partner - Anglin Reichmann Armstrong, P.C.

Stephen Armstrong is a Partner at Anglin Reichmann Armstrong with over 25 years of experience in public accounting. He is a graduate of the University of Alabama, where he earned his Bachelor of Science degree in accounting in 1993. Stephen supports Anglin's management and operations by representing the firm as CFO and Treasurer of the Board. In addition to supporting the firm's overall growth and strategy, Stephen focuses on client relationship development to understand clients' needs and how Anglin can proactively help them in the future. Stephen leads the firm's wealth management planning services, supports outsourced CFO services, and supports tax planning services. His advisory services provide clients with a better understanding of their current financial situation and make future business decisions. Stephen's industry focus includes construction, government contracting, and manufacturing.

Stephen serves on the board of the Associated Builders and Contractors of North Alabama, and he is a previous board member of the Land Trust of North Alabama. Stephen's thought leadership and solution-focused mindset positions his clients and the firm for growth and continuous improvement.

Our Speakers



Ryan Campbell, CPA, CGMA, CVA, MAcc
Partner - Anglin Reichmann Armstrong, P.C.

Ryan Campbell is the Partner-in-Charge of the Pensacola office at Anglin Reichmann Armstrong. He earned his Master of Accountancy in 2004 from the University of Alabama in Huntsville. In 2003, Ryan earned his Bachelor of Science in Business Administration-Accounting and graduated summa cum laude from Troy State University. He has over 18 years of experience in public accounting. In addition to expanding Anglin's client base in Pensacola, Ryan provides quality consulting services, including CFO and outsourced accounting services, business valuation, and advisory and accounting support. He also offers individual tax preparation and planning for high-net-worth individuals. Ryan represents the firm at various speaking engagements, such as webinars and conferences, to provide industry insight for clients and other firms. His industry focus includes construction, government contracting, manufacturing, professional services, and real estate.

Ryan serves as the Treasurer for the United Ministries of Pensacola and is a graduate of the Emerging Leaders Academy, Upstream Academy. Ryan's dedication to his clients allows business owners to feel supported through difficult decisions by providing them with the most accurate industry knowledge and guidance.



Kevin Dement
Principal of Client Development with Retirement Plan Services of
Avantax Planning PartnersSM

Kevin Dement is a principal of client development with retirement plan services of Avantax Planning PartnersSM. He partners with CPAs, tax professionals, and financial professionals on the client development and sales of company retirement plans. Kevin has over 30 years of retirement plan experience. Kevin has expertise in defined contribution, cash balance, defined benefit, 403(b), 457(b) and non-qualified compensation plans. In the sales role, Kevin reviews retirement plans to help ensure the client has the customized plan they are looking for with increased owner contributions and the maximum tax deductions possible.

EDUCATION & CREDENTIALS

After attending Loras College, Kevin obtained his FINRA Series 6 and 63 securities licenses. He also holds the Qualified 401(k) Advisor designation (QKA) and the Certified Plan Fiduciary Advisor designation (CPFA).



Jamie Pearman
CEO - Early Services

Jamie began her career with Early Services in 1986 as office manager. After serving as office manager for 15 years, she stepped into the role of Vice President and began helping run the day-to-day operations of the company. After serving as Vice President for 12 years, she took on the role of President where she transitioned into running the company. In 2018, she has transitioned into the position of CEO where she continues to direct the company with the help of her father, Jim Early, Sr, and her son, Scottie Pearman. Jamie was born and raised in Birmingham but relocated to Decatur in 1986, where she has remained for the last 37 years. She has three adult children and grandchildren. Jamie has served as Chairman of the Board and on various committees for Associated Builders and Contractors, North Alabama Chapter and currently serves on the Board of Subcontractors Association of Alabama (SubAla).

Our Speakers



Sean Lee

Vice President and Sr. Project Manager - Lee Builders, Inc.

Sean Lee is a Vice President and Sr. Project Manager for Lee Builders, Inc. in Huntsville, Ala., where he has worked for the past 32 years with a brief interruption to complete his Building Science Degree at Auburn University. From a very young age, Sean has had a passion for both hard work and the construction industry. His interests have always been in the commercial building segment where he enjoyed his many years spent physically working on the jobsites. Sean worked his way up from a general laborer to carpenter to assistant superintendent, then spent five years as a Project Superintendent. In mid-2000 he started as a Project Manager. Currently, he manages all office and financial activities, is a Sr. project manager, and has a leading role in safety.

Sean is a strong supporter of the Associated Builders and Contractors (ABC) organization where he has served on the board for several years and was Chairman of ABC North Alabama in 2022. He was a carpentry instructor for three years at North Alabama Craft Training Foundation and has also served on their board of directors for over 10 years, acting as Chairman for three years.



Jack Fite

President, CEO and Principal - Fite Building Company

Since purchasing 50% of Fite Building Company, Inc in 1994 and 100% in 2007, we have grown from 15 employees to over 120. Annual sales have grown from +/- \$5 million to over \$100 million. Since 1994, we have expanded our company from a small design-build contractor to a diversified general contracting and construction management firm building medical, institutional, church, financial, retail and industrial projects as well as maintenance for large industrial clients. Fite is licensed and operating in Alabama, Kentucky, Tennessee, Texas and Mississippi.



Jimmy Wall

President - Jesse Stutts, Inc.

Mr. Wall has over 38 years experience in the electrical contracting business. During this time he has worked as a laborer, apprentice, electrician, supervisor, estimator and project manager to President. Projects include commercial, industrial, pole line and substation construction. Projects related to hospitals as an estimator or project manager include a new multi story hospital, a major 5 floor addition to an existing hospital including ER and LDR areas, many projects in Huntsville Hospital and Fox Army Hospital. The previous three years has been serving as President of Jess Stutts, Inc., during this time the company has more than doubled in size while maintaining a strong financial position and not losing sight of quality installations.



Moderator: Tiffany Brightwell

President - Associated Builders and Contractors North Alabama Chapter

Tiffany Brightwell joined the ABC North Alabama Chapter as President in 2013. In her role at ABC, she oversees the Chapter's daily operations. ABC is a nationwide construction association built on the Merit Shop philosophy, helping members develop talent, win work, and deliver that work safely, ethically and profitably. The North Alabama Chapter serves over 200 member companies in Huntsville and surrounding areas. Tiffany is a 2005 graduate of the University of South Alabama and received her IOM designation in 2014. She and her husband live in Priceville with their two children.

Our Speakers



Larry Lewis

CEO at BizTech & President of PROJECTXYZ

Larry Lewis is co-founder and president of PROJECTXYZ, Inc. He has over 30 years of experience in government contracting, business, and technical leadership roles. As president, he leads corporate development activities, business development, strategic planning and partnerships, new venture development, acquisitions, and financial management.

Larry is heavily engaged in the startup community serving as the CEO of the Business Technology Development Center (BIZTECH), Huntsville's oldest business incubator. He was appointed by the City of Tusculumbia, Alabama to serve on the Shoals Economic Development Authority (SEDA). This organization provides economic development and work force development services for the two counties and the four primary cities that make up the Shoals region. He is the 2022-2023 Board Chair.

Larry is also Advisory Board Chair for Alabama A&M's RISE Foundation, an organization that promotes commercialization and business development of the University's technology and technical capabilities. He also serves on the board for the Business Council of Alabama; Past Board Chair for the United Way Huntsville/Madison County; Board Member for The Catalyst Center for Business and Entrepreneurship; Board Member for the Faith Initiative.

Larry has a Bachelor of Science degree in technical industrial management and an MBA in finance and strategic planning from The University of Alabama in Tuscaloosa.



Alice & Steve Lessmann

Signalink, Inc.

Alice Lessmann is a native of the Huntsville / Madison area. She earned her bachelor's and master's degrees from the University of Alabama in Huntsville. Presently, Alice is the CEO of Signalink, Inc., a small company she and her husband Steve Lessmann own, located in Madison, Ala. She has served many roles within the community such as elementary school PTA board and numerous school chair positions in the past. She currently serves on the Signalink Serves Board, Madison Youth Football and Cheer Board as Vice President, and volunteers with her church. Alice is a retired Lieutenant Colonel from the Alabama Army National Guard and a member of the Association of the United States Army (AUSA,) the National Guard Association of the United States (NGAUS) and Women in Defense (WID) She is also a Certified Registered Nurse Practitioner (CRNP) and continues to keep her license current. She and her husband, Steve, met while serving in a Patriot Missile Unit together and are both veterans.

Steve Lessmann earned an early education in the value of hard work and the importance of creating opportunities for himself. At various points during and after high school, he held several jobs including graphic illustrator, insurance sales, cook, and he even spent time on a dynamite crew. Eventually, he decided to join the military. His time in training provided an increased level of discipline and purpose, characteristics that continue to guide his personal and professional decisions. An entrepreneur at heart, Steve founded Signalink after retiring from the military in 2005, where he serves as president. The award-winning business has earned designations including Best Professional Services, Technology Business of the Year, and, most recently, placing silver in the 2022 Alabama Small Business of the Year Award Ceremony. He and his wife Alice acquired Cepeda Systems & Software Analysis (CSSA) in 2022 where he serves as president.

Now Steve is focused on growing the businesses, and its employees, to their full potential. He's also working on identifying and positioning someone to take the lead in the future. While he is proud of what has been accomplished professionally, he is most fulfilled having a front-row seat to seeing his wife and two children - Leah and Ben - achieve their goals.

Our Speakers



Jim Barrett

Executive Vice President of Engineering for Ethic Tech

Jim Barrett is the former CEO of Analytix, LLC which he co-founded with his wife, Renee Barrett, in 2007. Analytix was acquired by Ethic Tech, a Veteran Owned Small Business (VOSB) and SBA 8(a) Certified Native American Company, on 7/1/2021. Analytix provides engineering and cyber services support to multiple governmental agencies, including Missile Defense Agency, PEO Missiles and Space, CCDC (AMRDEC), and the Operational Test Agency (OTA). Jim Barrett now serves as the Executive Vice President of Engineering for Ethic Tech continuing engineering and cyber services under the 8a and veteran owned umbrella in support of federal customers.



Shellie Mitchell

Chief Executive Officer - OASYS, INC.

Shellie Mitchell is the Chief Executive Officer of OASYS, INC., a government technology services company, based in Huntsville, Alabama, specializing in big data, data analytics, cyber and software engineering. Shellie manages all facets of the Company's operations, including business development, proposal writing, customer relations, finance and accounting, and other areas. With over 21 years of experience, she provides OASYS with the leadership critical to building value, accelerating growth and profitability, and strengthening operations in an increasingly competitive environment.

Prior to joining OASYS, Shellie held technical leadership positions for small and large of contractors in the defense industry, including Deputy Program Manager, Test Management Engineer and Product Assurance Manager. During her career, she has supported a wide variety of U.S. Government customers including the AMCOM Logistics Center (ALC), U.S. Army's 160th Special Operations Aviation Regiment (SOAR), PEO Aviation, Future Combat Systems (FCS), Department of the Army Simulation Training and Instrumentation Command (STRICOM), the Defense Finance and Accounting Service (DFAS), and the Air-to-Ground Missile Systems (AGMS) Project Office. She has significant experience providing subject matter expertise and leading teams with respect to software development, program planning, quality assurance, configuration management, information assurance, risk management, business process re-engineering and cost estimation.

Shellie founded Friends of 400 Foundation in 2014 as a 501(c)(3) organization dedicated to improving the physical, emotional, spiritual and relational challenges experienced by at-risk youth from low income, primarily single-parent families in Huntsville, Alabama. Ms. Mitchell has Bachelor's (BSBA) and Master's (MSBA) degrees of Business Administration in Economics from Mississippi State University.



Moderator: Meg Hampton, CPA, MAcc

Manager - Anglin Reichmann Armstrong, P.C.

Meg Hampton is a Manager in the Audit and Assurance Department. Meg attended the University of Alabama, where she earned a Master of Accountancy in 2009 and a Bachelor of Science in Accounting, graduating cum laude in 2008. Meg has over 12 years of experience in public accounting, providing audits, reviews, compilations and preparations of financial statements to clients in various industries. Meg is certified as a Peer Review Captain and works with the peer review team to provide value to firms around the country. In addition to these services, she has several years of experience in solutions and tax and provides support to clients in these areas. Her industry focus includes government contracting, employee benefit plans, construction, and not-for-profit agencies.

Meg serves as the Treasurer of the board for Big Brothers Big Sisters of The Tennessee Valley and is a Volunteer Instructor Coach with the Catalyst Center. She is also very involved in the training webinars that Anglin hosts throughout the year. Meg's ability to share her knowledge thoughtfully and her approachable nature allow clients to navigate future business decisions confidently.

Our Speakers



Michael Calkins
Engineering Practice Lead - Egnyte

Michael has spent his career working to make technology accessible to those in the AEC industry. Having begun his career practicing architecture, he gained an appreciation for the benefits the implementation of a new tool can bring. He went on to apply his industry knowledge and experiences with technology in the software industry as a trainer and consultant. In his current role as Engineering Practice Lead at Egnyte he guides go-to-market strategy and industry engagement.



Leigh Christian
The Catalyst Center for Business Entrepreneurship

Leigh Christian is one of the founders The Catalyst Center for Business and Entrepreneurship. She has been involved for 20+ years with The Catalyst and has served in many capacities. She is currently serving as our Project Manager for the TechRich and 7(j) programs. Leigh also owns Plans to Prosper Consulting and serves as a small business consultant primarily for government contractors. Leigh specializes in Government Contracting, Innovation, and Technology, Business Development, Proposal Management, Strategy, Startup, Teaming, and other areas of small business. Leigh has a Bachelor's in Business Administration from Faulkner University and an Associate's in Retail Merchandising from Calhoun College and holds professional designations in Advanced Contract Management and Contract Management.



Sonja Greene, MBA
The Catalyst Center for Business Entrepreneurship

Sonja Greene, MBA is the President/CEO of Greene Development Company, Inc., a Woman-Owned Small Business that provide strategic solutions, Administrative Services, Professional Development Training, and Business Development. Sonja was the 2019 Innovate Huntsville Entrepreneur of the Year Finalist. She is indeed a Southern Girl and proud of it. She has made it her duty to inspire, encourage and empower women. Her passion is leadership. She has served as a professional panelist for Auburn University, spokesperson in press conferences for small businesses, instructor for the School of Business and a Focus '27 graduate of Leadership Huntsville Madison County. She served on the Women's Economic Development Council Board of Directors, and WEDC Foundation Board and she was also an Emissary for the Huntsville Madison County Chamber of Commerce. A past general business coach and current deputy project manager of the 7(j) Management and Technical Assistance Program for The Catalyst Center for small business owners and aspiring entrepreneurs. She is currently the President for the Huntsville Madison County Auburn Board. She is the 2021 Auburn Women's Summit Panelist Speaker. She serves on the Women's Council for Madison Hospital supporting the Huntsville Hospital Foundation. She is the Co-Host for a weekly Podcast, Manifest Monday with Dr. Kreslyn Kelly-Ellis. She is a writer for the Semi-Monthly publication, the Powerhouse Magazine, a magazine to empower women. She is the weekly podcast host of "The Greene Thing with Sonja Greene" to talk candidly about real issues that change lives. She is most proud of her role as Taylor and Sydney's Mother, and GG to her grandbabies. As a national speaker on topics like "Who's Your Tribe and Your Leadership Is Showing", her spirit is contagious, and power filled. She believes when you pour into others, you soar. Her favorite quote is by Zig Ziglar, "You can get everything in life you want if you will just help enough other people get what they want".

Our Speakers



Luke Kinzer, CPA, CFE, CGMA, MBA
Partner - Anglin Reichmann Armstrong, P.C.

Luke Kinzer is a Partner in the Audit and Assurance Department at Anglin Reichmann Armstrong with over ten years of experience in public accounting. Luke earned his Master of Business Administration from the University of Alabama in Huntsville in 2015. He also attended Auburn University for his undergraduate where he earned his Bachelor of Science in Accounting in 2006. Luke supports clients with planning, strategy, auditing, and advisory services regarding Employee Stock Ownership Plans (ESOP), noncash compensation, and business combinations. As Anglin's Employee Benefit Plan Audit Quality Center Representative, Luke is instrumental in the firm's audit and consulting services for retirement plans. Luke also performs peer reviews, agreed-upon procedures, and a supervisory role for the firm's auditing and compliance services. Luke also supports the firm by providing various training opportunities to inform clients and staff of auditing and financial requirements. His industry focus includes biotechnology, government contracting, construction, and employee benefit plans.

Luke serves as Treasurer of the Madison County Volunteer Lawyers Program and is a Past-President of the Huntsville Chapter of the Alabama Society of CPAs. Luke's consultancy services and industry knowledge allows his coworkers and clients to make informed decisions to reach their business goals and enjoy future success.



LeAnne Goode, CPA, MBA
Manager - Anglin Reichmann Armstrong, P.C.

LeAnne Goode is a Manager in the Audit and Assurance Department. She earned her Master of Business Administration-Accounting from the University of North Alabama in 2016. LeAnne also attended the University of North Alabama for her undergraduate, graduating magna cum laude with a Bachelor of Business Administration in 2013. She is experienced in public accounting, assisting with audit and accounting services. LeAnne supports her clients with reviewed and audited financial statements and employee benefit plans. She has a great deal of experience working with clients of various sizes in the manufacturing, not-for-profit, construction, and government contracting industries. LeAnne also serves as the Anglin Pool-Staff Manager, training new employees to learn the company's processes and procedures. In this role, LeAnne also supports new employees with career development and shadow opportunities.

LeAnne is an active member of Phi Mu Fraternity Alumnae and the University of Northern Alabama Alumnae Association. She is a member of ABC of North Alabama and serves on their membership committee and is a member of their Future Leader's Exchange program. LeAnne's proactive approach with clients and staff ensures they are prepared for the future and have the resources or knowledge to be more efficient moving forward.



Christopher D. Cook, CPA
Partner - Anglin Reichmann Armstrong, P.C.

Christopher Cook is a Partner in the Tax Advisory Services Department. He earned his Bachelor of Science in Business Administration-Accounting where he graduated summa cum laude in 2013. Chris has over seven years of experience in public accounting, supporting many clients, including high-net-worth individuals and corporations, with tax planning and advisory services. He leads Anglin's R&D tax credit service, a specialty income credit for creating new technology or processes. Chris' industry focus includes: information technology, government contracting, manufacturing and real estate, as well as biotechnology and professional services.

Chris is a member of the University of Alabama at Huntsville Alumni Association. He also serves as a board member for the Microwave Dave Music Education Foundation and Alabama Values Progress. Chris's careful analysis and advisory services ensure clients can make informed strategic decisions to move their company forward.

Our Speakers



Jessica Cassidy, CPA, MAcc
Manager - Anglin Reichmann Armstrong, P.C.

Jessica Cassidy is a Manager in the Solutions Advisory Services Department. She earned her Master of Arts in Accounting in 2012 from the University of Illinois. In 2010, Jessica earned her Bachelor of Science in Accounting and Management from Purdue University. She has over 10 years of experience in public accounting, providing tailored consulting services to each client based on their financial goals. Jessica helps mitigate and solve problems that arise by communicating the accounting procedures and processes with her clients. In addition to providing consulting services, Jessica prepares and maintains records of various financial information, such as bank statements; end-of-month reporting; budgeting, and bookkeeping services. These services help clients evaluate their current financial information and help prepare clients for future business decisions and goal setting. Jessica supports clients within the government contracting industry to maintain up-to-date accounting information in the Deltek Cost-Point software system. She also helps clients using the QuickBooks® desktop and online platforms. Her industry focus includes government contracting, healthcare, and not-for-profit agencies.

Jessica's consultancy allows her clients to understand their financial information better and use it to support future business decisions strategically.



Dr. Anirban Basu
Chairman & CEO of Sage Policy Group, Inc.

Anirban Basu is Chairman & CEO of Sage Policy Group, Inc., an economic and policy consulting firm headquartered in Baltimore, Maryland with an office in Orlando, Florida. The firm provides strategic analytical services to energy suppliers, law firms, medical systems, government agencies, and real estate developers among others. In 2014, Maryland Governor Larry Hogan appointed him Chair of the Maryland Economic Development Commission (2014-2021). He serves as Chairman of the Baltimore County Economic Advisory Committee. He also serves the chief economist function for Associated Builders and Contractors, the Construction Financial Management Association, the Modular Building Institute, and the Maryland Bankers Association. He has taught at several universities, most frequently at the Johns Hopkins University. He currently teaches History of Economic Thought at Goucher College as their Distinguished Economist in Residence. In 2007, 2016, and 2022, the Daily Record newspaper selected Dr. Basu as one of Maryland's 50 most influential people. The Baltimore Business Journal named him one of the region's 20 most powerful business leaders in 2010. Dr. Basu is currently on the boards of the University of Maryland School of Law, St. Mary's College, the University of Maryland Medical Center, the University System of Maryland Foundation, the Lyric Opera House and the Archdiocese of Baltimore School System. Dr. Basu earned his Bachelor of Science degree in Foreign Service at Georgetown University. He earned his Master's in Public Policy from Harvard University's John F. Kennedy School of Government, and his Master's in Economics from the University of Maryland, College Park. He acquired his Juris Doctor at the University of Maryland School of Law. He completed his doctoral work at UMBC with a concentration in health economics.



Event Coordinator: Kami Minor
Director of Marketing & Communications - Anglin Reichmann Armstrong, P.C.

Kami joined Anglin Reichmann Armstrong in May of 2019. Kami has her Bachelor of Science degree in Public Relations and Speech Communications from the University of Central Arkansas. She has experience in public relations, marketing, administration, management and team leadership training. Before joining Anglin, Kami worked as a website administrator and communications manager for a faith-based not-for-profit and as a national account executive for a global telecommunications company.

Kami manages firm-wide communications, marketing, and Anglin's business development initiatives. She is a member of the Association for Accounting Marketing (AAM). Kami earned her Digital Marketing Fundamentals Certificate from Association for Accounting Marketing in 2023. She also is an active board member of a local HOA and serves as the architectural approval chair. Kami also serves as a volunteer with Madison City School District.

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