



# The 2016 MP Elite

Our annual list of great accounting firm leaders

BY DANIEL HOOD

**Rising to the rank of managing partner can be a grueling experience. Those who start their own firms have to put in years of hard work before they can be sure they'll last.**

Those who take the position in an already-established firm face an even longer time climbing the hierarchy and proving themselves. So by the time a person takes the helm, you can be pretty sure they have

demonstrated some grit, some mettle, some vision, some leadership, and some political and personal savvy.

That does not mean, however, that they are all the same. While becoming a firm leader

is impressive, there is a small portion of that elect group who go beyond — who point the way to the future, who set the best practices that others follow, and who lead the most successful, most admired firms.

These are the Managing Partner Elite.

As we picked this year's class, we noticed certain traits that many of them share (beyond high growth rates, naturally):

▶ **They live culture.** In many cases, they drive their firm's culture — it's a reflection of their personality. But even when it's more broadly sourced from across the firm, they champion it constantly.

▶ **They do more than treat staff like family.** Every firm says that it does this, but the MP Elite actually create concrete initiatives to give it meaning, like career development pro-

grams, official flex-time policies, and the like.

▶ **They lead elsewhere, too.** Not only are they deeply involved in their communities, but they often take leadership roles at charities and local organizations.

▶ **They like technology, but they're not generally geeks.** For most, technology is an enormously valuable tool that they are not afraid to leverage — but it's still just a tool, a means to an end.

For all that they have in common, though, the best leaders are still unique individuals, and each offers their own lessons. With that, we introduce the 2016 Class of the MP Elite.



## Losses to gains

**Antonio Argiz / MBAF  
Chairman and CEO since 1997**

When nine-year-old Antonio Argiz's parents sent him alone to Miami to escape Castro's revolution, Cuba's loss became America's gain. And when young college pitcher "Tony" Argiz decided that his fastball wasn't quite enough for the Major Leagues, baseball's loss was accounting's gain — and it's been quite a gain, for his firm, for the profession, and for his community.

In his almost-20 years at the helm of MBAF, Argiz has boosted its revenue almost tenfold and its staff fivefold, while expanding its geographic reach across the country and around the world, creating a widely respected powerhouse that stands out in the profession for its international expertise — and its diversity. With all that, he still finds time to be deeply involved in his communities, whether by volunteering with the American Institute of CPAs and his local state board, or serving a wide range of charities and civic groups, where he's made a lasting mark as a past chair of the Greater Miami Chamber of Commerce, the United Way of Miami-Dade, and the Orange Bowl.



## Plan-maker

**Richard Berkowitz /  
Berkowitz Pollack Brant  
Founded firm in 1980**

We'd say that there seems to be something in the Florida air that turns out great firms, but in the case of Berkowitz Pollack Brant, it's pretty clear that the firm's success has less to do with the air and much more to do with founder Richard Berkowitz. From the firm's inception, one of his goals has been to build  
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a place where people can develop great careers, a focus he retains to this day, where it's led to a proactive embrace of the workstyles of Millennials — and a stunningly low single-digit turnover rate.

He has paired that concern for culture and environment with strong, detailed plans for the firm's future. BPB has long since blown past Berkowitz's original strategic goal of entering *Accounting Today's* Top 100 Firms list at No. 95 (they were No. 68 in 2016), and he has guided it in developing industry-leading practice specialties in international tax, real estate, and wealth and estate advisory. He has even planned for the firm's future without him: They have had a succession plan in place for over five years, under which Berkowitz has been grooming and mentoring the next CEO to succeed him when he transitions to the chairman's role next January.



### The Wise MP

**Joey Havens / Horne**  
Executive partner since 2012;  
joined in 1984

Leaders are rare, but rarer still are leaders who develop other leaders — and Joey Havens is definitely one of those. It shows in the “Wise Firm” culture he has installed at Horne, an incredibly positive and empowering ethos that urges employees to “beBetter,” even as it gives them unparalleled flexibility and support to do so. (It's well worth a look at [www.wisefirm.com](http://www.wisefirm.com).)

Some may see values like trust and servant leadership and transparency as secondary to expertise and billable hours, but the results at Horne are clear: Under Havens, the firm has grown its revenues over 40 percent, grown its staff almost 30 percent (while significantly lowering turnover), and innovated in service areas like its new cybersecurity practice.



### A true standout

**Diane Medley / Mountjoy Chilton Medley**  
Co-founded predecessor  
firm in 1988

Medley is one of only four women leading firms among the Top 100 — but while that certainly makes her stand out, she's not in our MP Elite list because she's a woman.

She's on the list because she built the firm she co-founded from scratch into the largest firm in Kentucky, a powerhouse with a spot among the leading firms in the country that's now pursuing an aggressive regional expansion plan. Underpinning all that success is a strong focus on leadership and talent, with programs for identifying and grooming rising stars, and an active Next-Generation Committee to help with recruiting and retention. And while being a woman wasn't what got her on the list, Medley's commitment to female leadership helped cement her spot: 37 percent of MCM's partners and principals are women, and the Accounting MOVE Project named it one of 2016's Best CPA Firms for Women.



### An eye on the future

**Jeffery Mowery / Mowery & Schoenfeld**

MP since 2008; co-founded firm in 1996

It's hard enough to lead for today — leading for tomorrow is even more difficult, but Jeffery Mowery manages to do both, with a strong grasp of what his firm needs to succeed now, and constant effort to prepare for what's ahead. Whether it's expanding into new service areas like wealth management and working with “search funds,” establishing an annual strategic planning process; staying on top of technology by going paperless before most other firms and hiring an internal IT manager; or moving the firm's mindset to focus as much on its team members as its clients so that it has a strong bench of talent going forward, his initiatives are as much about tomorrow as today. And to give you an idea of how far ahead he's planning, he's already identified his successor as MP, though the transition is still at least five years off.



### All cylinders

**Charles Postal / Santos, Postal & Co.**  
MP since 2002; joined 1986

In any given firm, you can find any number of people who are really good at one thing — maybe they really understand technology, or they inspire those around them, or they're great at execution — but not so good at everything else. What sets the MP Elite apart is that they're generally really good at a broad range of things, and Charles Postal is a per-

fect example of that.

During his tenure, Santos Postal has quadrupled in revenues and quintupled in staff; completed five acquisitions; added six new practice areas; launched annually revised strategic and succession plans; implemented a host of cutting-edge technology innovations; and been named an *Accounting Today* Best Firm to Work For five times. Given that he is clearly firing on all cylinders, it should come as no surprise that Postal won a Digital CPA Innovative Practitioner Award this year.



### Cutting edge

**Scott Price / A-LIGN**  
MP since 2013; co-founded in 2009

Some people see the future and work toward it, and others live there already. Price is one of the latter, running his firm now the way everyone will in five or 10 years. From a single office in Florida he has expanded to offices in major markets all over the country, with clients all over the world, thanks in no small part to his ability to leverage technology and the firm's remote workforce — which has also helped him significantly grow his international client base. A-LIGN has also built its own secure documentation upload system, and Price has made innovation in sales and business development a priority. At the same time, he has created a “Strategic People Plan” with an emphasis on engaging with and actually listening to the firm's employees.



### Truly elite

**Jeffrey Weiner / Marcum**  
MP since 1990; joined in 1981

Weiner was a member of our inaugural class of the MP Elite in 2012, and it's no accident that he returns this year — he's one of the most admired firm leaders in the country, and continues to lead Marcum to new heights, remaining just as aggressive in both M&A and organic growth. When he first made the list, we noted his national drive; now we can note his international drive, with a major presence in China. He keeps the firm innovative with new offerings in practice areas like LGBT services, cybersecurity, and alternative investments, and built a stable of affiliated companies in wealth management, technology, executive search and more. With his firm's revenue, reach and relevance continually on the rise, Weiner is truly one of the Elite. AT

## THE MP ELITE

### CLASS OF 2015

Jason Blumer  
Gregory Burbach  
Michael Gillis  
Cathy Iconis  
Brian Mandell-Rice  
Steven Marcus  
Jody Padar  
Harvey Wallace

### CLASS OF 2014

Louis Grassi  
William Hagaman  
Benjamin Hamrick  
Steven Kelly  
Elizabeth Mercier  
John Milligan  
Mark Radetic  
G. Brint Ryan  
Kathy Ryan  
John Sensiba

### CLASS OF 2013

Brian Amann  
Andy Armanino  
John Bly  
Tom Bonadio  
Tracey Early  
Ed Guttenplan  
Jim Kaufman  
Victoria Martin  
Maria Montie  
Greg Skoda

### CLASS OF 2012

Charles Allen  
Scott Becker  
Timothy Christen  
Robert Ciarrufoli  
David Graling  
Kenneth Guidry  
Alan Long  
Gary Shamis  
Steven Templeton  
Jeffrey Weiner