Ray Petkovsek, CPA
President-elect
A smooth succession

Certified Public Accountant Ray Petkovsek’s involvement with the WICPA Educational Foundation, Inc. allows him to promote accounting careers and financial literacy to local high school and college students.

Petkovsek, a member of the WICPA for 17 years and current president-elect of the Board, knows the positive impact that exposing students to accounting careers can make.

Growing up on a dairy farm near Willard convinced Petkovsek early on that milking cows wasn’t for him. He attended the University of Wisconsin–Eau Claire, where he earned a bachelor’s degree in public accounting in 1973.

“After a few accounting classes, I discovered this was worth my effort—and the rest is history,” he said.

Petkovsek’s first accounting job was as an income tax auditor for the Wisconsin Department of Revenue. In 1974, he joined White, Reinholtz & Pfefferkorn CPAs, working in public accounting. From 1983–1986, he developed real estate in Madison. In 1984, he began his own CPA practice, now known as Petkovsek & Moran, LLP in Madison.

Petkovsek added staff over the years. In 2000, he formed a partnership, and acquired a small firm in 2005. Petkovsek & Moran has six full-time and three part-time employees, including partners Dave Moran, Tina Lough Nelson and Brian Burant.

To Petkovsek, having good math skills isn’t the most important quality that a great CPA can possess. Most importantly, he or she should “have an inquisitive and analytical mind to explore and analyze data; a keen ability to listen to and decipher what the speaker is saying; and excellent writing and speaking skills to clearly communicate your thoughts, ideas and solutions to the recipient,” he said.

As president-elect, Petkovsek said he would work to help members “realize what a valuable resource this organization is for them and their career. Significant opportunities are available for education, mentoring students and young professionals and volunteering your unique skills within your community.”

An avid musky fisherman, Petkovsek also enjoys spending time with his family, astronomy, woodworking, traveling and architectural design.

He and wife, Sue, live in Madison. They have three children: Kim, 37, Brian, 33 and Roger, 31.

Sandra S. “Sandy” Chapman, CPA
Vice President
Making the connection

Sandra S. “Sandy” Chapman, CPA at Engleson and Associates in Holmen, spent most of her childhood watching her parents develop a successful car dealership. Working with her parents and their CPA during her teen and college years strengthened Chapman’s desire to become a CPA.

A WICPA member since 1998, Chapman has been involved with the Accounting Careers Committee. As a Board member, she would like to see the organization strengthen its connections with high school teachers, college professors and its members. Connecting long-time members with new members and connecting the Board to committees are among her other goals.

Involvement with the Accounting Careers Committee has opened Chapman’s eyes to the value of her membership. She said she would also work to improve member involvement and encourage member mentoring.

“We could expand the Young Professional Group to other geographic areas of Wisconsin,” she said. “We could suggest that an experienced CPA team up with a new CPA to speak to a high school or college class. We could possibly encourage a challenge to have every WICPA members’ firm or company be represented in at least one WICPA activity throughout the year. I would also like to see partners bringing younger staff to WICPA events, committee meetings, CPE courses or forums. Those types of events are great vehicles for getting young staff involved in the WICPA and meeting local CPAs.”

Chapman described a great accountant as someone who “would be an active contributor by making the most of opportunities to build their careers; to contribute to the success of their firm by helping grow the business, mentoring coworkers and serving the needs of their clients and to contribute to their community by volunteering and to strengthen their profession by being an active member of the WICPA.”

She encouraged new members to “get involved immediately and indefinitely.”

In her spare time, Chapman enjoys participating in her children’s busy lives, attending football, basketball or baseball games, piano lesson, gymnastic meets and dance performances. She and her family also enjoy swimming, biking and hiking. She and her husband, John, have two children, Ryan, 10, and Samantha, 7.
Jean M. Hansen, CPA
Vice President
Life-long learner

By Leah Grunewald

after experiencing the economic downturn during the early 1980’s, Jean M. Hansen, CPA decided to return to school to pursue her passion for accounting. It was her passion for analytical thinking and drive for providing options for herself that have led her down an accounting career path. She is still on the path, chasing down the dream of obtaining her Ph.D.

Hansen is currently employed as a controller with Manitowoc Tool & Machining LLC. She has been with that company for 2 ½ years. Her business experiences include controller positions for a plastics injection mold manufacturer, an architectural wood door manufacturer and a laboratory furniture manufacturer.

“Each organization had different processes and materials components directly related to the product produced; however they have many of the same challenges within the organization,” she said.

Hansen joined the WICPA in 1996. While on the Board she would like to focus on one aspect of the WICPA mission, which is to promote the accounting profession. Hansen said she would “like to educate our youth to the exciting benefits that an accounting career can provide. I would like to remove the stereotypes that accountants are typically introverted and lack personality.”

“My WICPA membership has taught me that being a CPA can allow for some exciting career opportunities if you desire them,” she said. “By networking with other CPA professionals, I realized that changing jobs was necessary to continue advancing my skill-set and work experiences.”

She would encourage new members to get involved with the WICPA and learn as much as they can about the profession and members.

“The WICPA offers some very talented CPA members that have accomplished amazing things in their careers,” she said. “Use a mentor to assist you in becoming the most you can.”

Hansen said if she could improve on one thing with the WICPA, it would be emphasizing how valuable the networking opportunities are to current and prospective members.

She would like to “offer ways to develop this network…by increasing exposure through regional focus groups and marketing efforts, as well as through training, education and membership mixers.”

In her spare time, Hansen enjoys spending time in her cabin with her family and friends, reading and recreational bike riding. She and her husband, Jeff, have two grown children, Sarah and Dane.

Neil R. Keller, CPA, ABV, CVA
Vice President
(fulfilling Katherine A. Karcz’s term)

Endless opportunities

After crafting a 13-year career that includes working with closely-held businesses in tax, business valuations and consulting, Neil R. Keller, CPA/ABV, CVA has become a tax shareholder at Kolb+Co. SC in Brookfield. Keller has accepted another new challenge: vice-president on the WICPA Board of Directors.

An active WICPA member since 1996, Keller has participated as a speaker in the organization’s CPAs in Industry Conference, TGIF for CPAs, and High School Educators’ Symposium. He has also served on the Finance Committee and Accounting Careers Committee.

The organization needs to do a better job at educating members about its mission and informing members of the numerous “behind the scenes” functions that the WICPA and its members are performing for the benefit of the profession, he said. As a Board member, Keller aims to encourage other members to promote the CPA profession and encourage more young professionals to join the organization.

“We have been very fortunate to have some incredible CPAs involved with the WICPA for a long time,” he said. “Now we need to work on the next generation of incredible CPAs. By being involved, CPAs take ownership of their profession and I believe it is that feeling of ownership by the younger CPAs that will assure a strong and successful future for the WICPA and the profession as a whole.”

Becoming an accountant wasn’t Keller’s first career choice. He planned to study international business in college but switched his focus to accounting.

“I never took an accounting class in high school, but as part of the college curriculum, I ended up taking an accounting class,” he said. “As I found out more about the number of different opportunities available within the profession and the importance the accountant plays within the business world, I knew that it was the profession for me.”

A sports enthusiast, Keller stays active by playing volleyball, softball and golf. The Pewaukee resident enjoys spending time with his wife, Lynn, and their two children, Lily, 4 and Emelia, 1, including numerous trips to the Milwaukee County Zoo.
Gary A. Schmid, CPA
Vice President
Beyond the numbers

To say that Gary A. Schmid, CPA carries a full plate of duties as comptroller/deputy treasurer for the City of West Allis is an understatement. His position includes the oversight of the accounting functions of the city, the issuance of debt, assisting with preparation of the city budget, the investing of city funds, supervising the treasury functions, and assisting with economic development projects. He has worked there since 1991. He also acts as the Treasurer for Good Shepherd’s Evangelical Lutheran Church and the Lutheran Pioneer - Pine Ridge Campgrounds.

Schmid has another role: vice president for the WICPA Board of Directors. A WICPA member since 1986, Schmid has served on the Accounting and Auditing and Governmental Financial Management Conference Planning Task Force. He said the membership benefits he values most are the conferences, seminars and networking with his peers.

“As a member, I value the contact with other people,” he said. “If I have a question in government, I know I can contact other members who work in government for the answers. I also enjoy the corporate and income tax seminars and courses. From the tax seminars, I get a better understanding of what the private sector is trying to accomplish and what we in government should be doing.”

While on the Board, Schmid said he would like the organization to encourage more members to attend conferences, seminars, CPE and other related events. One way we can accomplish this is by more promotion to members.

“People need to keep up-to-date with continuing education and with what’s important in the industry,” he said. “I think the conferences are a valuable benefit for the members.

“It’s also important that they are affordable,” he said. “I believe that one thing that we (the Board) should try to work on is the cost of the conferences—not that the rate has to come down. But what we need to get across to people is the value of what they can gain by attending the conferences. If we promote that more, they can see the value in what is offered.”

According to Schmid, qualities that a great accountant possesses include staying current on issues affecting the CPA industry, business and government, having strong attention to detail, an ability to follow through and a willingness to get involved.

When he has free time, Schmid said he and his family occasionally enjoy spending time at a cabin in the Minocqua/Lac du Flambeau area. Places that he would like to visit one day are Hawaii and Alaska. He and his wife, Brenda, live in West Allis and have two children, Erin, 18, and Jonathan, 15.

RETURNING BOARD MEMBERS

Daniel J. Heerey, CPA
Past President
Employer: Quest Technologies, Oconomowoc
Position: Chief financial officer
Hometown: Janesville

Gerald E. Denor, CPA
Secretary-Treasurer
Employer: Dana Investment Advisors, Brookfield
Position: Executive vice president-administration
Hometown: Elm Grove

Stephen A. Bien, CPA
Vice President
Employer: LarsonAllen, Altoona
Position: Managing partner
Hometown: Eau Claire

Don E. Giacominio, CPA
Vice President
Employer: Marquette University, Milwaukee
Position: Professor of accounting and the Donald F. Flynn and Beverly L. Flynn chair in the College of Business Administration
Hometown: Mequon

Tricia A. Knight, CPA
Vice President
Employer: Ritz, Holman, Butala, Fine LLP, Milwaukee
Position: Partner
Hometown: Milwaukee

Nicholas S. Lascari, CPA
Vice President
Employer: Virchow, Krause & Co. LLP, Madison
Position: Tax partner
Hometown: Wauwatosa

Kim L. Tredinnick, CPA
AICPA Council
Employer: Virchow, Krause & Co. LLP, Madison
Position: Partner
Hometown: De Forest

Karin M. Gale, CPA
AICPA Council
Employer: Schenck Business Solutions, Milwaukee
Position: Partner
Hometown: West Allis

Brian R. Schilling, CPA
Vice President
Employer: Bauman Associates, Eau Claire
Position: Partner
Hometown: Eau Claire