

Welcome to LEA Global

LEA Update – Latin America Regional Conference

August 3-5, 2023



Rising Star Association



INTERNATIONAL ACCOUNTING BULLETIN

Today

- Strategy Review
- Governance
- Call to Action

Our guiding belief



Collaboration (noun)
The act of working
together to produce
a piece of work

It's about what you put in as much as
you take out. Only then do you develop
the mutual trust that leads to better
partnerships, better opportunities and
better potential, because when you
collaborate with better partners, you
become a better partner.

Our vision
To be the world's
most collaborative
professional service
firm association.





Our mission

To help people
bring the best
out in themselves.

We value



Transparency



Trust



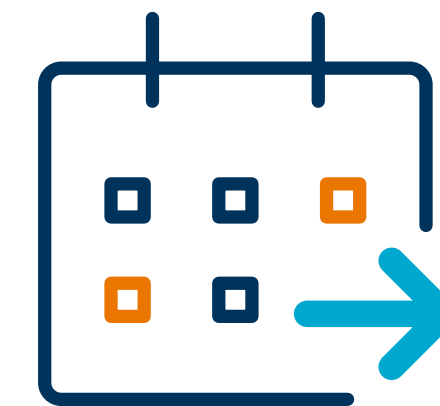
Inclusion



Commitment



Fun



Tomorrow

A bit more
about us



LEA by the numbers

5th

largest association
in the world

140+

global member
firms

\$2.6b+

total
revenue

76+

countries

450+

offices

1,800+

partners

18,500+

employees

Latin America by the numbers

5th

largest association
in Latin America

30

member
firms

\$4 1.9 m

total
revenue

19

countries

44

branches

119

partners

1,255

employees

Governance



LEA Global Board of Directors



Roberto Harteneck
Harteneck & Asociados
Argentina



Alan Litwin
KLR
Providence, RI



Robert Minkler, Jr.
Anders CPAs +
Advisors
St. Louis, MO
LEA Global Board Chair



Wayne Pinnell
Haskell & White
Irvine, CA



Andrew Rich
HW Fisher
London



Mark Roderick
Perks
Adelaide, Australia



Tony Szczepaniak
LEA Global
Eden Prairie, MN
LEA Global CEO



Hein Vandelanotte
Vandelanotte
Belgium



Alberto Vettoretti
Dezan Shira & Associates
Hong Kong



Jeffrey Weiner
Marcum LLP
New York, NY
LEA Global Board
Vice-Chair



Jason Yetter
Richie May
Denver, CO

LEA Global team



Tony Szczepaniak
CEO



Carla Rossini
Chief Operating Officer



Sara DeMann
Chief Marketing Officer



Jeff Strand
Director, Quality
Management



Maricar Galler
Asia Pacific Liaison



Elaine Foley
European Liaison



Carla Blattenbauer
Executive Assistant
Program Manager



Nikki Dwyer
Member Services
Representative



Jill Szczepaniak
Member Services
Representative



Natalie Duncan
Global Accountant



Ali Welsh
Global Events



Debbie Wiebe
Global Project Manager



Ashley Lampen
Director of Member
Engagement

Latin America Regional Council



Gerd Foerster
Confidor
Brazil



Victor Gonzalez
Manuel Cervantes &
Asociados S.C.
Guatemala



Roberto Harteneck
Harteneck & Asociados
S.R.L.
Argentina



Jaime Suarez
Herrera
Leading Edge Audit &
Consulting CIA. LTDA
Ecuador



Reinaldo Achurra
Oses
Achurra, Navarro y
Asociados
Panama



Jesus Antonio
Garcia Romo
Garrido Licon y
Asociados
Mexico



Javier Fuentes
Zambrano
JFZ Consulting Firm, SC
Mexico



Tony Szczepaniak
LEA Global

Regional Council Committees – Objectives



- Provide focus on key areas to help the region unite and grow
- Create culture of accountability to agree on specific goals
- Increase opportunities for people to participate in governance of the region

Committees Purpose

- **Growth** – Increase number of firms, close open countries, cover open service lines, open communications around member engagement
- **Programs**– Identify programs that may create value for the region, lead conference agenda and locations
- **Quality**– Ensure members committed to maintaining quality, participate in portions of the due diligence on new member firms

Latin America Growth Committee



Gerd Foerster
Confidor
Brazil



Monica Foerster
Confidor
Brazil



Reinaldo Achurra
Osse
Achurra, Navarro
Asociados
Panama



Javier Fuentes
Zambrano
JFZ Consulting Firm, SC
Mexico



Growth

Unrepresented Geographies		
Bahamas	Belize	Cuba
El Salvador	French Guiana	Guyana
Honduras	Suriname	Trinidad

Under-Represented Service Lines	
Argentina - Tax	Bolivia - Tax
Dominican Republic – Tax	Paraguay Accounting - Tax

Members in Good Standing

- Payments
- Bylaws
- Annual Survey

Members with Good Engagement

- Leadership roles
- Council/ Committee participation
- Collaboration group participation
- Conference attendance
- Responsiveness to requests and surveys



Latin America Programs Committee



Roberto Harteneck
Harteneck & Asociados
S.R.L.
Argentina



Jaime Suarez
Herrera
Leading Edge Audit &
Consulting CIA. LTDA
Ecuador



Collaboration Groups

Purpose of Collaboration Groups: Build community, develop relationships, create knowledge base and build value for the community – regionally and globally.

Latin America Groups:

- Audit
- International Tax
- Marketing
- Young Professionals



Collaboration and discussion groups

Operations

- **Managing Partners**
- CFOs
- COOs
- **HR**
- **IT**
- **Marketing**
- Talent Acquisition Managers

Service Lines

- **A & A**
- CAS (Client Accounting Services)
- Estates & Trusts
- Family Business/ CEPA
- **International Tax**
- State and Local Tax
- Tax
- Valuations, Forensic & Litigation Support

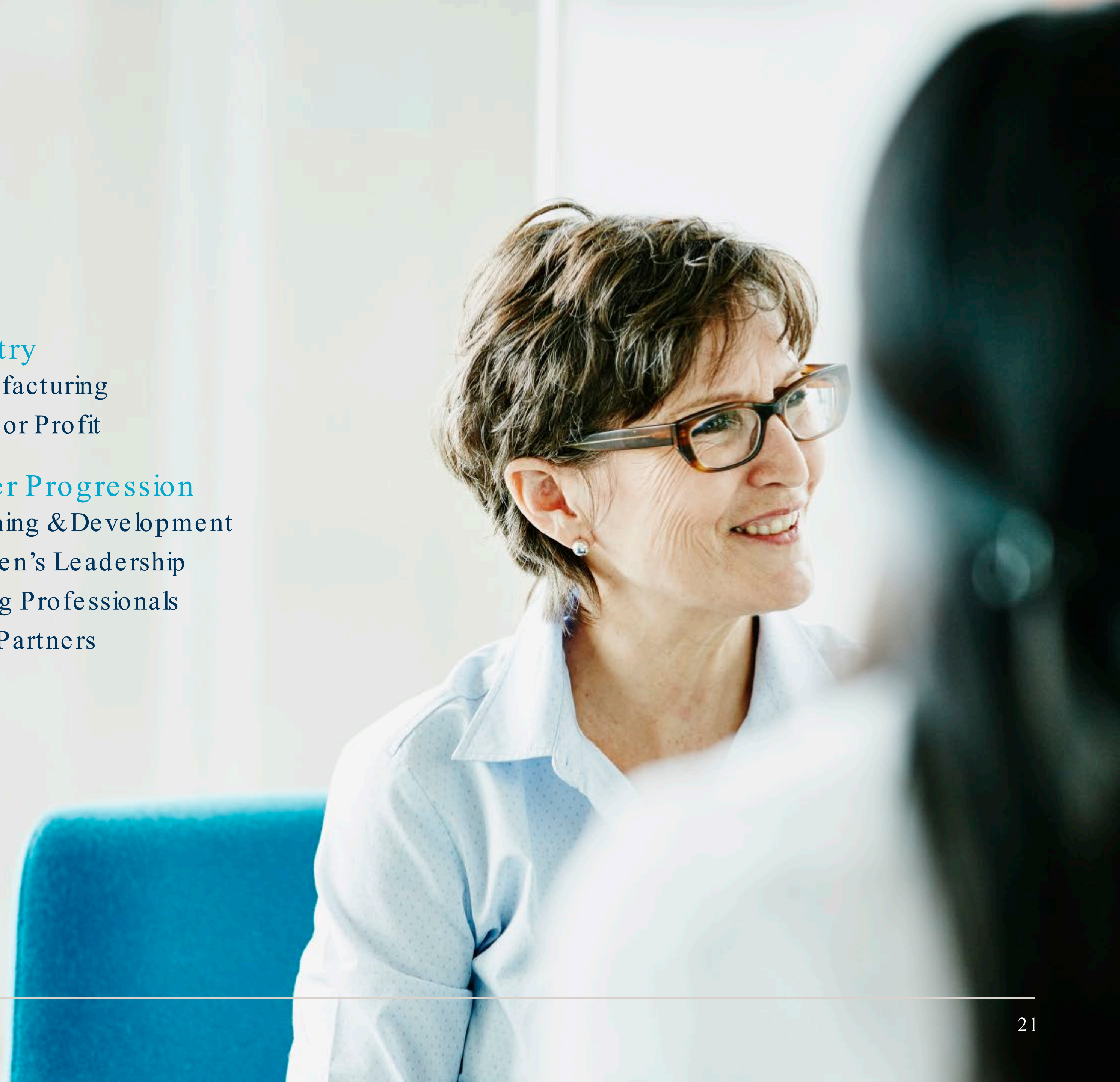
Industry

- Manufacturing
- Not For Profit

Career Progression

- Learning & Development
- Women's Leadership
- Young Professionals
- New Partners

**Collaboration Groups
under consideration by
the Council**



Programs and collaboration initiatives

LEA Academy (Developmental Programs)

- Emerging Leaders Program
- Growth Program
- US Federal Tax Update
- Tax Levels

LEA Labs (Collaborations and Pilots)

- Tech Pilots
- DEI Pilots

Resource Centers

- US National Tax
- **Global Consulting Marketplace**
- **Country Desks**
- **Global Talent Exchange**

Latin America Quality Committee



Richardo Lechuga
Reyes
Garrido Liconay
Mexico



Victor Gonzalez
Manuel Cervantes &
Asociados S.C.
Guatemala



Jesus Antonio
Garcia Romo
Garrido Liconay
Asociados
Mexico



Jeff Strand
LEA Global
Director, Quality
Management



Quality

- Received internal inspections information from Turkey affiliate
 - ✓ Will not use
- Will use the International Standard on Quality Management (ISQM) standards as approved by the International Auditing and Assurance Standards Board (IAASB)
 - ✓ Will receive a copy from member firm Van Oers fall of 2023



Call to Action

- Consider joining one of the Council Committees
- Consider participating on a Collaboration Group Steering Committee



Contact us

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