

## Ones to Watch: Accounting

By: Valerie Huntley, Market Research/Reporter ◉ January 4, 2018 0



### **Allie Livaudais CPA** senior accountant, tax services

Ericksen Krentel

Allie Livaudais prepares the majority of the most complex tax returns for clients with an emphasis on nonprofit, partnership, corporation, trust and individual tax returns. Her work has included a variety of industries including nonprofits, real estate, hospitality, construction and professional service firms.

Livaudais is the website director for the Accounting and Financial Women's Alliance's New Orleans chapter and serves as a member of the American Institute of CPAs and the Society of Louisiana CPAs. She was named a 2014 New Orleans CityBusiness Money Makers honoree in the professional category. She earned her master's degree in accounting from the University of New Orleans and her bachelor's degree in psychology from LSU.

### **Michelle Biermann-Treschwig** senior audit manager *Kushner LaGraize LLC*

**Michelle Biermann-Treschwig** started her career in public accounting with Kushner LaGraize LLC in 2001. As a senior audit manager, she provides ongoing assistance to management as well as overseeing engagement planning, fieldwork and financial statement presentation. She specializes in audits of governmental entities, including single audits, and has experience auditing employee benefit and pension plans, broker-dealers, professional services, nonprofit and transportation entities. She has obtained her AICPA Single Audit Advanced Certification and plans on pursuing her Certified Governmental Financial Manager designation. In addition, Biermann-Treschwig performs numerous internal control reviews and provides other management consulting services. Administratively, she is in charge of scheduling continuing professional education for the audit department, overseeing the CPE reporting for the firm and she participates in the recruiting process.

Biermann-Treschwig has been a longtime member of the American Institute of Certified Public Accountants and Society of Louisiana CPAs and is also active with Volunteers of America, providing support to their adoption program through the GolfStar Classic, either as a committee member or other supporting role. She is a graduate of Texas A&M University and the University of New Orleans and is a member of the Texas A&M Association of Former Students and the 12<sup>th</sup> Man Foundation.



**Terri Troyer, CPA**  
**director, tax services and shareholder**  
*LaPorte CPAs & Business Advisors*

Terri Troyer has almost 30 years of public accounting experience and is a leader focused on the growth of and knowledge transfer by the Tax Services Group. Her experience extends across all aspects of corporate taxation, IRS and state income/franchise tax examinations and individual tax and compliance planning. In particular, she has handled tax matters involving multi-state activities, management companies, service companies, pass-through entities, commercial and residential real estate property development, high-wealth individuals and nonprofits. She has worked with clients to secure federal and state jobs credits, state training grants, property tax incentives, research and development credits and enterprise zone credits. The firm's designated leader of multi-state income and franchise tax services, Troyer concentrates her efforts in the multi-state planning arena. Her experience includes serving several clients with activities in all 50 states. She completed State and Local Taxation Boot Camp, which is specifically designed for RSM US Alliance multi-state taxation professionals. She regularly attends high-level multi-state conferences at New York University School of Law and Georgetown Law as well as with the American Bar Association.

Troyer has served on the United Way of Southeast Louisiana finance committee for many years. She was also an active member of the Isidore Newman School and St. George's Episcopal School parent associations. She is a certified public accountant and member of the American Institute of Certified Public Accountants and the Society of Louisiana Certified Public Accountants. She earned her bachelor of science degree in finance from the University of New Orleans.

**Jose Aponte III, CPA**  
**senior manager**  
*Carr Riggs & Ingram LLC*

Jose Aponte III serves hospital service districts, not-for-profit hospitals, health plans, physician practices and for-profit surgical hospitals as well as local governments and not-for-profit organizations. With nine years of experience in public accounting, he specializes in health care and leads engagement teams in audits, agreed-upon procedures and other assurance projects for health care entities. He also provides consulting services to health care clients in the areas of financial close and reporting assistance, board and finance committee report design, financial analysis and operational efficiency analysis.

Aponte is a member of the Healthcare Financial Management Association's Medicare/Medicaid Committee, Louisiana Society of CPAs and its CPA Medical and Healthcare Task Force and nonprofit Task Force and the American Institute of CPAs. He presents continuing education courses on technical topics with the Louisiana Hospital Association and LSCPA. He earned his bachelor of science degree in accounting from LSU.

**Valerie Lowry, CPA**  
**partner, accounting and assurance**  
*Wegmann Dazet & Company*

Valerie Lowry has been with Wegmann Dazet for 17 years. Her career experience includes practicing in public accounting in the audit and accounting department, serving clients in a variety of industries. She handles financial audits, reviews and compilations, ERISA audits including defined contribution, defined benefit and 401(k) plans, agreed upon procedures and accounting and bookkeeping services.

Lowry is a certified public accountant in Louisiana and is an active parishioner of Sacred Heart of Jesus Church, Norco; a past board member of Junior Achievement of New Orleans; member of the American Institute of Certified Public Accountants and a member of the Society of Louisiana Certified Public Accountants. She was the youngest person ever to be named a partner at Wegmann Dazet. She received her bachelor's of science degree in accounting from Southeastern Louisiana University.



**Celeste McDonald, CPA, CFSA****associate director***Postlethwaite & Netterville APAC*

Celeste McDonald joined P&N in August 2010 and works with a wide-range of clients from large, public companies to small, private operations providing audit and consultation services. She performs financial statement audits and has several years of experience in planning and executing internal and compliance audits. While in college, she served as the graduate assistant for Business Operations Department of the Student Union and Programming.

McDonald is actively involved in the community and has a passion for helping other professionals succeed in their careers. She currently serves as board treasurer for Dress for Success New Orleans and board treasurer for the Institute of Internal Auditors New Orleans Chapter which helps provide support and advocacy for internal auditors. She also serves as the board treasurer for the Pi Beta Phi New Orleans Alumnae Chapter. McDonald earned her bachelor's degree in business administration-accounting at the University of Southern Mississippi and then went on to complete her master's of professional accountancy. She is a certified public accountant and a certified financial services auditor.

## WHO'S WATCHING YOU?

*To submit your name or a colleague's for "Ones to Watch," contact Valerie Huntley at [vhuntley@nopg.com](mailto:vhuntley@nopg.com) or 293-9273.*

**To sign up for free CityBusiness Daily Updates, click [here](#).**

**RTA is how  
New Orleans rolls.**

Every day our employees strive to uphold our mission to provide safe, reliable, efficient and sustainable mobility that passengers and clients can trust.

