

PEOPLE ON THE MOVE

Advertising Feature ▶ Hirings, promotions and other moves at local businesses

ACCOUNTING



HCVT Announces Record Growth and Promotion of John Samtoy, Tax Principal

The Orange County office of HCVT, the fifth largest CPA firm based in Los Angeles, announced that **John Samtoy** has been promoted to principal. John specializes in international tax consulting and compliance services and primarily serves private equity, real estate, and closely-held businesses. John joined HCVT in 2009. The office also announced the promotion of three new managers, Ryan Barragar, Jonathan Camp, and Alice Park. In total, the firm announced 111 promotions at its annual meeting held on June 24, including its 48th partner, Christopher Gays from the firm's Fort Worth, Texas office.

The Orange County office of HCVT was established in 2006 and has grown to nearly 100 team members. The firm's private equity practice and international tax practice are located in the Orange County office and in 2015, the office expanded to include an audit practice led by Mike Thielman. Donna Hansen leads the office and brings over 30 years public accounting experience. "We are very proud of the growth of the Orange County office of HCVT. Year over year, our headcount is up 33%. In January, we added two partners, Phillip Allred and Jessica Fine, Dane Samson, tax principal, joined us from EY, and Brian Lo, tax principal from our tax technology practice, relocated from our Ft. Worth office." Phil Holthouse, managing partner, added "With our expansion to Northern California earlier this year, our eight offices in Southern California, our industry focus and specialized services, we are well-positioned to continue the momentum in our growth, both in terms of revenue growth and additions to the team. Adding the right talent to the firm is one of our top priorities."

About HCVT

Celebrating our 25th year, HCVT is one of the fastest growing CPA firms in the nation validating the technical experience of our team and our approach to client service. We provide tax, accounting, business management, and mergers & acquisition services to private companies, closely-held businesses, public companies and high net worth individuals and family offices. We provide auditing services to privately held businesses, funds, and employee benefit plans. Our tax practice is comprehensive and includes federal, state and local, international, credits and incentives and estate and trust services. Today, our revenues are more than \$100 million, and we are a team of over 450 members, including 48 partners, and 47 principals. We serve our clients from eight offices in Southern California and offices in Walnut Creek, CA, Ft. Worth, Texas and Park City, Utah. *Inside Public Accounting* has recognized HCVT as one of the Best of the Best Firms for a record 11 consecutive years. To learn more about HCVT, see www.hcvt.com.



Samtoy

WEALTH MANAGEMENT



Optivest Wealth Management Introduces Dee Cinquegrani as Vice President of Finance & Development

Dee Cinquegrani serves Optivest clients with over 20 years of experience in Business Development & Planning, Accounting and Human Resources. Her specialized contribution includes developing the OptiWealth online financial aggregator and working closely with CPAs, Attorneys and industry leaders to offer Optivest clients the peace of mind they deserve.

Dee is a member of AICPA, CalCPA, is a California Notary Public, holds a real estate Salesperson license for California, and is a graduate of Cal-State Fullerton. True to the Optivest culture that giving is living, you can often find Dee supporting local charitable organizations and community programs.

Optivest is a full-service wealth management firm that provides sophisticated, holistic advisory services to high net-worth families and individuals.

Optivest offers the following advisory services: fiduciary portfolio management, investment reporting, investment advice, legacy planning, financial planning, investment banking, retirement planning, direct ownership in commercial real estate, plus business exit and estate planning.

Optivest Wealth Management is a trusted family wealth advisory firm founded in 1987 by Mark Van Mourick, CEO and Registered Investment Advisor with over 35 years of professional experience. Optivest believes that family wealth is more than just money. True wealth management is a consultative process involving advanced planning across all areas of your finances including tax efficiency, wealth transfer, wealth protection and philanthropy.



Cinquegrani

Dee can be reached at dee@optivestinc.com or 949.363.8686 www.optivestinc.com.

ACCOUNTING

MOSS ADAMS LLP

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Tom LaPlaca Joins Moss Adams as Partner

Moss Adams is pleased to announce that **Tom LaPlaca** has joined the firm as a Partner in the Orange County office. Tom will play an important role in serving the Southern California market and has significant experience in serving SEC companies. Tom has over 20 years of accounting experience and works with clients in a diverse range of industries including gaming, hospitality, entertainment, financial institutions, real estate, and manufacturing and distribution. Prior to joining Moss Adams, he was the Senior Vice President and Chief Accounting Officer for a large public company. Before his move into industry, Tom was a partner at a Big Four firm serving both public and private companies.

With 29 locations in Washington, Oregon, California, Arizona, New Mexico, Kansas, and Texas, Moss Adams is one of the 15 largest accounting and consulting firms in the United States. Our staff of more than 2,400 includes over 260 partners. Moss Adams provides accounting, tax, consulting, risk management, transaction and private client services to public and private middle-market enterprises through specialized industry-specific service teams.



LaPlaca

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