



Hawks & Associates CPAs, Inc.

• think **BOLDLY** • plan **CAREFULLY** • execute **PRECISELY** •

HawksCPA Happenings!

We are very happy to announce that four of our best and brightest have joined the ranks as corporate shareholders effective January 1, 2024. In their order of originally coming on staff; Tara Perry, Matt Manafi, Tracy Bell, and Josh Bigelow. They have each demonstrated their strong loyalty to the firm's values, not to mention the requisite technical competence, over their years with us. We congratulate them for their accomplishments, and for taking this big step in their careers!

This change ushers in a new era for the firm and our founders Rob and Jen Hawks, bringing the first co-owners into the fold. In case you're guessing, there will be no retirement parties any time soon but groundwork for an eventual exit plan is in place.

What is changing now: Rob and Jen will be transitioning over the coming years, dedicating more of their time to further growth and development of the core team, and less of their time to providing direct client services – working “on” the business more than “in” it. Rob will support and assist the professional staff in building client relationships, he will provide insight and technical help wherever needed, and he will maintain select client relationships. Jen will support and assist the paraprofessional and admin staff. The new core team will become more involved in direct client contact and communication, fielding all new client inquiries while expanding existing relationships.

What is not changing now: Rob and Jen continue to hold the majority ownership of the firm, Rob alone at a 51% controlling interest. The firm's strategies and values have not changed; we remain committed to providing superior professional services to our diverse client base, while growing and developing the business, and while maintaining a productive and sustainable firm culture well into the future. Rob and Jen will continue to lead the firm's management while developing the core team.

All of us at HawksCPA are very excited for the future! Our team members in Sonora and Modesto and remote are all thriving, and we appreciate our strong relationships with fellow professionals, colleagues, and referral networks in the area. We have thoroughly enjoyed building the firm with the present team of devoted individuals, and we look forward to continuing the firm long into the future – we have other exciting plans coming up soon and we hope you will join us for the journey!

Thanks as always,