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# Beyond *the* Numbers

A Crow Shields Bailey PC News Publication



Summer 2015



## *In Memory of* Arthur "Bruce" Dudley, Jr.



On March 16th, CSB Partner, Arthur "Bruce" Dudley, Jr., passed away after a brief battle with cancer. He was a beloved colleague and friend and will be greatly missed by all who knew him.

Bruce was a respected leader in the Mobile business community and was dedicated to building long-lasting relationships with his clients. He graduated from Murphy High School and attended Spring Hill College before graduating from the University of Alabama Culverhouse College of Commerce and Business Administration. Bruce was a Sigma Chi at Alabama and maintained lifelong friendships through his many affiliations.

Bruce was an honor graduate and first in his basic officer training class, entering the US Army Support Command and earning an Army Commendation Medal for outstanding service.

### Newsletter Contributors

- Nikki Allen
- Ryan Damrich
- Sherri Deighton
- Deborah Fisher
- John Shields
- Jenna Summersell

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## Our Vision

Our firm's objective is to maximize our clients' wealth. We strive to be the premier accounting and consulting firm in our area by offering a complete range of quality services to our clients. We will employ only the best people and ensure outstanding training and long-term career opportunities.

## Team Members

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Visit our website at: [CSBcpa.com](http://CSBcpa.com)

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He became a Certified Public Accountant in 1967 and became a partner in a firm with Andrew Wiik and Henry Reimer. His final practice, Dudley, Chateau and Cox, merged with Crow Shields Bailey, where Bruce spent his final years before retiring after nearly forty-seven years in practice. During his career, Bruce participated in numerous business and civic activities. He was an officer of the Mobile Chapter of CPAs and a board member and President of the National Association of Accountants. He was also a board member, Treasurer and President of the West Mobile Rotary Club, St. Luke's Episcopal School and Heron Lakes Country Club. Bruce was a member of Christ United Methodist Church for many years.



An avid golfer, Bruce enjoyed playing with his friends and taught all of his children to play, with three daughters winning the team Alabama State Championship at McGill Toolen and St. Paul's.

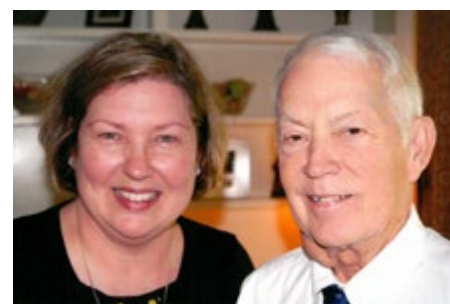
He belonged to both the

Country Club of Mobile and Heron Lakes Country Club. With a 2-5 handicap for many years, Bruce was always proud of the 31 he shot on the front nine at Heron Lakes. Bruce shared his love of the game with many other junior golfers as he supported and was deeply involved with the Jimmy Green Junior Golf Association.

In addition to his love for golf, Bruce enjoyed many years fishing and sailing at his home in Point Clear. He was always delighted teaching his children how to cast a shrimp net or how to ski.

Bruce celebrated 73 years of life providing his family with strength, guidance, and love. He was devoted to his wife, Michelle Blackwell Dudley, nine children and fourteen grandchildren. He found great joy in the presence of those he loved, both family and friends.

A memorial service was held on March 20th at Christ United Methodist Church where many friends and family came to pay their respects and celebrate the life of this wonderful man.



Facebook.com/CSBCPA



Linkedin.com/company/crow-shields-bailey-pc

## CLIENT SPOTLIGHT



A fun, modern and stylish way to serve your party guests custom sweet treats is what Lauren Kapeluck and Jennifer Christ of **ellenJAY Stylish Events + Sweets** are all about. And they do just that, in a BIG way! Starting last October, these entrepreneurs turned a hobby into one of the coolest new businesses in town. A chic little midtown cottage is now a bakery that offers delicious custom sweets ranging from gorgeous sugar cookies and cake pops to gourmet cupcakes and seasonal cakes. And everything can be made in the theme of your event or an upcoming holiday.



With Lauren as the creative mind behind the designs and recipes and Jennifer as the business-minded stylist, there is a great balance of innovation and business smarts. What differentiates ellenJAY from other bakeries? Lauren says that “by taking style into consideration in everything we do, we can offer so much more than a delicious baked good. We aim to ensure everything is modern, stylish and fun.”

Jennifer adds that “Prior to launching ellenJAY, Lauren and I made it our mission to surround ourselves with an outstanding team of professionals who were equipped to help us meet our goal of becoming a premiere bakery within the Mobile and Baldwin County areas. Crow Shields Bailey has been instrumental in laying a solid foundation for our growing business. Nikki and Kenny have provided training, guidance and strategic planning to help us keep up with a quickly increasing demand for our services.



And we’re enrolled in CSB’s ‘Business Getting Results’ program where we’ve picked up some very useful tips on operating our business. We are so thankful for CSB and the services they offer.”

One great thing about ellenJAY is that no event is too large or too small, as they cater to birthday parties, holiday gatherings, corporate events and weddings with their sweets and dessert table designs. They’ve seen a tremendous



benefit to using social media, where their tempting treats are vividly displayed to over 5,000 Facebook and Instagram followers. And they have teamed up with other local businesses, including Cammie’s Old Dutch which provides the ice cream for ellenJAY’s new sumptuous ice cream cookie sandwiches, and USA Women’s and Children’s gift shop where ellenJAY gift boxes and sweets are available.

Go to “Ellen Jay Stylish Events + Sweets” to find them on Facebook, and ellenJAYevents for Instagram. Their website is at [www.ellenJAYevents.com](http://www.ellenJAYevents.com) and the phone number is 219-7406. Finally, if you want to go by and meet this dynamic duo and sample some of their wares which are now on sale at their shop for walk-in customers, visit them at 2158 Airport Blvd. in midtown Mobile.

# Team Member

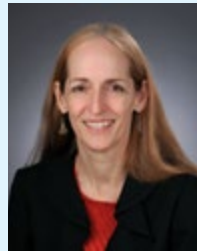
## New Partners at Crow Shields Bailey

Kristi B. Daughtery, CPA and Colleen A. Keleher, CPA have been named partners at CSB.



**Kristi B. Daughtery**

A graduate of the University of Alabama, Kristi has been with the firm for 15 years, concentrating her practice in individual, partnership and corporate tax as well as fiduciary and estate tax. She also manages the firm's Daphne location.



**Colleen A. Keleher**

Colleen is a graduate of the University of South Alabama with 25 years of experience in public accounting. Her primary areas of expertise are not-for-profit organizations, retirement plans, small business audits, and income taxation of estates and trusts.

Joey and Connie Bailey have a lot to be proud of. Mary Catherine Bailey represented CSB as one of the models for the Ronald McDonald House Little Black Dress event. She is currently a special education teacher at Indian Springs Elementary School.



**Mary Catherine Bailey**

Michael Bailey graduated with a Masters of Accounting degree from Auburn University. He will begin working with Ernst and Young in Birmingham in the fall.



**Michael Bailey**

Scott Bailey graduated from McGill-Toolen Catholic High School and plans to attend the University of South Alabama in the fall. Scott also won the Cy Young award for pitching at McGill-Toolen.



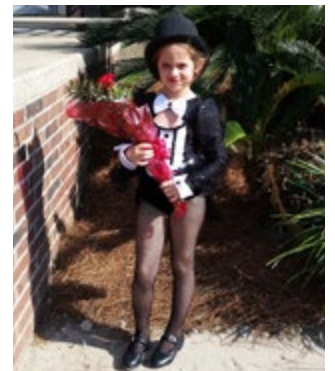
**Scott Bailey**



**Bailey Blackwell**

Bailey Blackwell, grandson of Vivian Jo Chateau, graduated on June 12 from Corinth-Holders High School in Clayton, NC. He gave the salutatorian address of his class of about 400 seniors at graduation. He is also the FCA president, vice-president of his senior class, has been a year-round varsity athlete and letterman for cross-country, swim and track, as well as team captain for each team both his junior and senior years. He is vice-president of his National Honor Society at Corinth-Holders. He began his freshman year of college at the United States Naval Academy on July 1, 2015. He has been an extremely active member in the youth group at Horne Memorial United

Methodist Church in Clayton, being a youth representative for the Capitol district for the state of North Carolina, and a keyboardist for the church's youth band, Declaration.



**Bryce Caskey**

La Nette Caskey's grandchildren have a lot going on. Bryce Caskey was in two programs for Broadway South Dance Studio's 2015 dance recital. She also auditioned and made the company dance team.



**Zac Caskey**

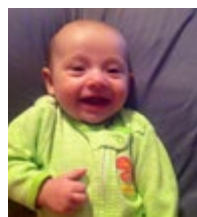
Zac Caskey is the 2015-2016 Drum Major for Theodore High School. Zac, a senior, was also elected as Vice-president of the Band Council.

ENS William Pierce Chilton, 2014 US Naval Academy graduate, received an award as "Class Honorman" at the Nuclear Power School graduation



**ENS William Pierce Chilton**

ceremony, Naval Nuclear Power Training Command, Charleston, SC. Pierce was also number one academically in a class of 457 navy officers and enlisted sailors. He will continue advanced studies in NY State before deployment on a Navy Nuclear Powered Warship. Pierce is the grandson of Vivian Jo Chateau.



**Bristol Lynne Corey**

Bristol Lynne Corey, granddaughter of Cheryl, was born on February 4.

# news



**Louise and Steven Oliver**

Louise Crow, daughter of Kenny and Marty Crow, was married to Steven Oliver of Hendersonville, Tennessee on May 9, 2015 in Point Clear, an area where the Crow family spent their summers growing up. Their spring wedding was held at Sacred Heart Catholic Chapel followed by an outdoor reception at Dorgan's Inn overlooking Mobile Bay. Guests enjoyed an old-fashioned southern wedding on the beautiful grounds, tasting local seafood dishes, enjoying a sunset view from the wharf and dancing the night away. Steven and Louise will be relocating to Colorado Springs for one year for Steven's dental residency at The United States Air Force Academy.



**Lee Howard**

Lee Howard interned with CSB in the spring and joined us full-time in May. Lee is a graduate of the University of South Alabama and is on our tax team.

Ryan O'Connor, son of Katie and Guy O'Connor, graduated with honors from Auburn University in May. He is looking forward to his new career with Southern Company in Birmingham.



**Katie, Ryan and Guy O'Connor.**



**Ryan, Kingsley and Mandy Damrich.**

Ryan and Mandy Damrich welcomed their first child on March 31. Kingsley Rose Damrich weighed 6 lbs. 14 oz. and was 20 inches long.



**Kingsley Rose Damrich**

Jacob Deighton, son of Sherri and Joe, was confirmed in April and graduated 8th grade in May from Incarnate Word Catholic Church Parish school in Chesterfield, MO.



**Joe, Jacob and Sherri Deighton**



**John Gafford**

Congratulations to John Gafford for passing the CPA Exam! John joined CSB in September 2014 and is a member of our tax team.



**Sim and Kirsten Sokom at Samford University's McWhorter School of Pharmacy's 2015 Commencement Ceremony in May.**

Kirsten Sokom has been promoted to Senior Accountant. Kirsten is a graduate of the University of South Alabama and joined CSB in November 2013. She is a member of our audit team and will primarily work in the Daphne office.

Sim Sokom, husband of Kirsten, recently graduated with a Doctor of Pharmacy degree from Samford University's McWhorter School of

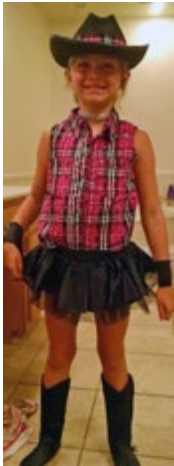
Pharmacy and received the School's Executive Council Award. He has accepted a position with Publix and will be working in the panhandle of Florida and surrounding areas.



**Jeremy Woodham**

Jeremy Woodham joined our team in January. Jeremy is a graduate of the University of South Alabama and is on our tax team.

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Ava Frerman  
Dance Recital



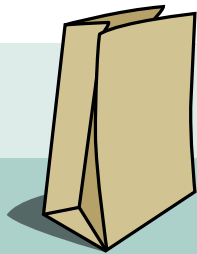
Madeline Frerman  
Dance Recital



USA Meet the Coaches Event. Left to right: Sim and Kirsten Sokom, John and Lauren Gafford.



Henry Frerman  
Soccer



## Paper or Plastic? Electronic Delivery of Tax Returns

At the grocery store checkout you sometimes get a choice: “Paper or Plastic”.

How about with your tax return - do you prefer “Paper or PDF”?

We’ve found that many of you choose the latter, as storing and retrieving electronic records can be easier and more convenient than keeping up with paper. Personal records, bill payments, bank account and credit card information are all now commonly stored on personal computers, online or in the “cloud”.

So why not tax returns?

CSB now offers electronic delivery and signature for individual and business returns. We rolled this service out during tax season and our clients were pleased with its

simplicity and convenience. It eliminates your picking up tax forms at our office, or getting the e-file forms by email, printing them out, signing and returning to us.

Here’s how it works. We send you an email when your return is ready for electronic signature. Using a secure online service called Right Signature, you can then:

- quickly and easily sign your return using your smart phone, tablet, or computer, and
- receive a secure email that allows you to download a PDF copy of your tax return to your computer.

That’s it!

We encourage you to give electronic delivery a try. We will send out additional information at year end. In the meantime, please contact us if you have any questions.



## Dear Tax Man

# Big Brother is Coming To Town

Dear Tax Man,  
“He sees you when you’re sleeping. He knows when you’re awake.  
He knows when you’ve been bad or good, so be good for goodness sake.”

Tax Man, we all know those lyrics. But I’m here to tell you, nowadays there’s no “Ho-Ho-Ho” about that song. It’s got nothin’ to do with the jolly old bearded man in the red suit.

It’s all about BIG BROTHER. He’s watching... you, me, him, her, and **everybody**. I’ve had enough!

So I’ve taken steps to protect myself.

First, I ditched my computer. No more email, web surfing, Facebook or other such nonsense.

Second, I got rid of my “smart” phone. It’s a lot smarter than you think. Next, since we know all screens are two-way, I unplugged my TV to keep HIM from watching ME.

Fourth, I disabled the navigation system in my truck so BB can’t track my whereabouts.

Then, I replaced my evil-eye home alarm system with “Smith & Wesson”. And finally: No more e-filing my tax return. I prepare it myself and hand-deliver it to the IRS office.

I must say these changes have not been without consequences. My wife left me. The children think I’m an alien. Friends dismiss me as paranoid. And my therapist diagnoses me as “borderline” schizophrenic.

So far from being jolly about my new lifestyle, I instead feel like ole Hank Williams and the whippoorwill. I’m so lonesome I could cry.

Your thoughts, Tax Man - am I crazy?

Signed,

Lonesome Little Brother

Dear LLB,

You may be on the fringe, my man.

But I feel your pain. These days, online intrusions into our lives are rampant. This Orwellian “1984” world is driving many of us to the brink. If I had my druthers, Little Brother, I’d probably join you

in eschewing all this crazy technology. But alas, it’s not possible to function without it.

While I don’t have all the answers to your computer conundrum, I can offer some thoughts on one of your lifestyle changes, that being the last one on your list.

Fraudulent tax returns have become quite a problem, with thousands of taxpayers being “hacked” and false returns filed in their name. But I can tell you that mailing or hand delivering your return the old fashioned way does not necessarily protect you from online assault. Once you get the paper return to an IRS service center, what do you think happens? Well, an IRS employee keypunches the information into their “Big Brother” computer and it ends up in the same data base as all the other electronically-filed tax returns. And while interception of electronically-filed returns does occur, many hacker thieves get your personal information from sources other than your tax return to file a false return under your name.

So what’s a taxpayer to do? Absent drastic measures like those you have employed, I think the best we can do is heed the advice of Sergeant Esterhaus in the 1980’s TV show “Hill Street Blues”. Upon dismissing his cops from early morning meetings, the wise old Sergeant would always admonish them with “Hey, let’s be careful out there.”

To help you be careful, the folks at CSB have posted some information on their website ([www.csbcpa.com](http://www.csbcpa.com)) about identity protection. These include procedures that CSB follows to protect client information, tips on what you can do to protect your privacy, and what action to take if, despite these precautions, you’re still “hacked” by a thief who then files a false tax return in your name.

Lonesome, I wish you luck in your pursuit of privacy. Here’s hoping you can make some reasonable compromises and reconnect with your family and friends. But regardless of what you do, I can guarantee you one thing. Your kids will still think you’re an alien.

Sincerely,

*Tax Man*

Tax Man



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