



Fall 2017



# Beyond<sup>the</sup>Numbers

A Crow Shields Bailey PC News Publication

## Client Spotlight Keith Air Conditioning, Inc.



Pictured L to R: Brent, Matt and Wayne Keith

Founded in 1964 by the late Stan Keith, Keith Air Conditioning is in its third generation as a local family-owned and operated business. Now run by Wayne, Brent and Matt Keith, the Company offers complete residential and commercial service and installation of air conditioning and heating systems.

For over fifty years, Keith Air has strived to provide top notch service, earning a reputation in Mobile and Baldwin counties for being friendly, trustworthy and reliable. They take time to listen and explain options to clients, allowing them to make an informed decision based on their individual budget and situation. No wonder that most of the Company's new business comes out of referrals from existing customers.

The Company philosophy is to constantly search for new talent, provide excellent training, and promote from within. Keith's team members are a tight-knit group and are treated like family, with Company-sponsored breakfasts or lunches occurring regularly. Keith Air is not your average company!

Thanks to their excellent team of dedicated employees, Keith Air has grown steadily over the years.

#### Newsletter Contributors

Sherri Deighton  
Deborah Fisher  
John Shields  
Emilee Shuler

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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

### Audit Team

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CSBcpa.com

Recent growth has included the popularity of their Total Comfort Maintenance Plan which provides preventative maintenance with two complete inspections for one low price.

And giving back to our community is a top priority of this deep-rooted local Company. Keith Air is a regular sponsor of numerous fundraisers in the Bay Area and is an active member of the Mobile and Eastern Shore Chambers of Commerce, including as a contributor to the Partners in Growth program. Wayne is in the Kiwanis Club and outgoing President of Mobile Baykeeper, with Brent following his Dad's lead and currently serving as Vice President of Baykeeper's Young Advisory Council. Matt and Brent are members of the Rotary Club of Mobile, with Brent also involved in the Midtown Mobile Movement Board and as a member of the Leadership Class of 2017.

Keith Air has been a client of our firm a long time, going back many years with Dudley Chateau Cox and continuing through our merger with DCC in 2009. According to Brent, the partnership with Crow Shields Bailey has been enjoyable. "Not only does CSB provide the annual tax filing and financial statement work, but they are invaluable trusted advisors throughout the year on financial and business matters". Adds Matt, "the Businesses Getting Results program was

invaluable to our business. Brent and I learned a great deal through participation in BGR and we recommend it highly to all business owners!"

Keith Air Conditioning – a great local business that we are proud to serve! Online at [www.keithair.com](http://www.keithair.com) or phone 251-476-3610. #



One of the Company's signature vans



## CSB Hosts the IMAGINE Leadership Conference

We hosted 13 accounting students from across the southeast at our second IMAGINE Leadership Conference on May 18 and 19. Through games, activities, thought-provoking questions, and dynamic speakers, we challenged the students to explore three traits that are essential for successful leadership:

- Defining personal **values**
- Creating a **vision** for the future, and
- Gaining the confidence to use their **voices** in all aspects of their lives.

The first day of the conference was at the beautiful Balcony on Church Street in Fairhope. Managing partner Kenny Crow kicked it off by talking with the students about how he has grown through personal experiences. Between starting his own firm as a young accountant to his wife being diagnosed with breast cancer in her 50s, he learned that in life he is the “passenger” and God is driving. Pointing to two of his recent readings, *The Go-Giver* and *The Fred Factor*, Kenny said these books really bring home the importance of focusing on the needs of others.

Our first guest speaker, Scott Tindle, spoke about **values**. Scott is known for bringing the Duck Boats to Mobile, and turning Fort Conde into “A hybrid between Colonial Williamsburg and Epcot.” Regarding values, Scott said that you should “Treat others the way they want to be treated,” without bringing yourself into it.

As a business owner, Scott emphasized the importance of employees coming first and treating them like people instead of assets of the company. If the employees are satisfied, then the customers will naturally be treated well and the bottom line will increase as a result. His contribution to the growth of Mobile is part of achieving his goal of helping build a city where his children will want to raise their families.

The second day of the conference was held at Five Rivers—Alabama’s

Delta Resource Center. Jonathan McConnell spoke on **vision**. Jonathan served our country as a Marine and is the founder of Meridian Global Consulting LLC, a global maritime security agency. Meridian was formed while he was still in law school and learned of the hijacking of the *Maersk Alabama* by Somali pirates. Jonathan makes it a point to hire Marine veterans to staff his company.

According to Jonathan, disconnecting is very important in establishing your vision. Whether you pray or meditate, or just take time to think alone for a certain amount of time every day, disconnecting and clearing your mind helps you stay on course. It is not necessary to constantly be available through your phone and social media. He also emphasized the importance of overcoming fear and acting on your ideas and visions.

Judge Edmond Naman closed the conference and spoke about **voice**. As a former lawyer and District Attorney, he has had quite a bit of experience with crime. It all started when he was a young boy and lost his admired uncle in a violent robbery. This life-changing event inspired him to be a lawyer. As he dealt with crime and saw what was happening to young people in the most impoverished communities, he figured out how he wanted to use his voice, becoming a juvenile court judge and advocating for troubled youth.

After many people in the community began to hear his frustrated and alarmed voice for these children, good things started happening. Under Judge Naman’s leadership, a program called NEST was founded (Nurture Empower Strengthen Transform). They use teams of 5 or 6 people, and each team sponsors an at-risk youth. The team members serve as mentors and do everything from providing financial support to transporting young people to and from activities. Judge Naman claims that it was a supernatural force that gave him his voice. He challenged the students to decide what voice inside them must be heard.

Our hope is that as a result of the conference, the students will be on the road to identifying their core values, have a vision in mind for what they want their futures to look like, and be comfortable using their voices in everything they do. Through these hard-hitting and inspirational stories, self-exploration, and spending time with our team members, we invite them to imagine what a difference they can make in their families, schools, local communities and the world. #



# Team Member **news**



**Lori Blum**

Lori Blum was promoted to Supervisor. She is a graduate of the University of South Alabama and is on our tax team. Additionally, Lori passed the Enrolled Agent Exam! According to the IRS website, "An enrolled agent is a person who has earned the privilege of representing taxpayers before the Internal Revenue Service by either passing a three-part comprehensive IRS test covering individual and business tax returns, or through experience as a former IRS employee. Enrolled

agent status is the highest credential the IRS awards. Individuals who obtain this elite status must adhere to ethical standards and complete 72 hours of continuing education courses every three years."

Lauren Cameron's son, Landon, started 4K at St. Mark! Also pictured are Lauren and Landon with Aunt Callie in Georgia and Mississippi hunting dinosaurs!



**L: Lauren and Landon, R: Landon, Aunt Callie and Lauren on the hunt!**



**Landon Cameron**



Kenny Crow was appointed as Chairman of the Real Men Wear Pink Breast Cancer campaign! These men are dedicated to raising awareness and funds to support the American Cancer Society's fight to end breast cancer. He was also appointed to University of Alabama's President's Cabinet. According to the University, "The President's Cabinet functions as an advisory group whose responsibility includes providing

the President with information on community needs, engaging in a free exchange of ideas, assisting the President by interpreting and responding to proposed future directions under consideration by the University, and in financially supporting the University."



**Real Men Wear Pink at The Pillars**

Ryan Damrich was nominated for RSM US LLP's Partner Development Program for leadership development and growth! This 20-month program gives participants the opportunity to network with peers from across the country and learn from some of the best in the business.

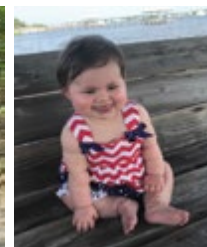


**Ryan Damrich**

Kingsley and Berkley Damrich, daughters of Ryan and Mandy, celebrating the 4th of July in Gulf Shores!

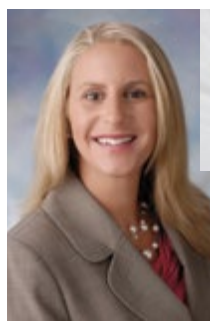


**Kingsley**



**Berkley**

Kristi Daughtery received a Paul Harris Fellow Award from Daphne / Spanish Fort Rotary Club for an outstanding year leading the club as President!



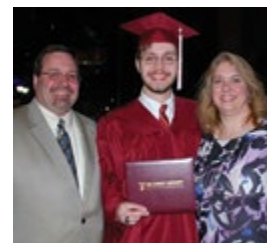
**Kristi Daughtery**



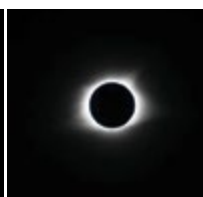
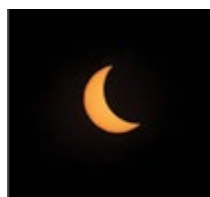
**Anna Collins**

Tim Deighton, son of Sherri and Joe, graduated as Valedictorian from DeSmet Jesuit High

School, and is a National Merit Finalist and Scholarship Recipient! He is attending Missouri University of Science and Technology, majoring in Mechanical Engineering.



**Joe, Tim & Sherri Deighton**



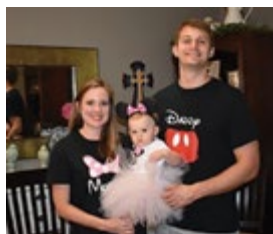
**Eclipse photos by Jacob Deighton**

Sherri Deighton's son Jacob took some spectacular photos of the Great American Eclipse near the path of totality in St. Louis, MO.

Colleen Dicks was promoted to Supervisor. She is a graduate of Auburn University and is on our audit team. Colleen was also appointed to the Mobile Chapter ASCPA Advisory Council! Mobile Chapter members are the guiding force of the council and work with the State Society to plan and administer chapter events.



**Colleen Dicks**



**Lauren, Emma & John Gafford**

John and Lauren Gafford celebrated their daughter Emma's first birthday!



Amanda Moore, daughter of Diana Moore, received a Master's degree in Social Work from Loyola University Chicago, specializing in children and families.



**Cindy Rathle**

Cindy Rathle was appointed to a 3 year term on the board of directors for the Alabama State Society of CPAs (ASCPA).

The Rathles and the Baileys took a rafting trip in July on the Ocoee River in Tennessee! This is the third year they have taken the trip with a group of 12 friends.



**Amanda & Diana Moore**



**Rathle / Bailey Rafting Trip**

Abby Roveda was promoted to Senior Accountant in January! Abby is a graduate of the University of Alabama and is a member of our audit team. She was also elected to serve on the board of Camp Rap-A-Hope.



**David Roveda holding son George at the White Coat Ceremony**

Abby Roveda's husband David received his white coat before beginning his third year of medical school at the USA College of Medicine! Also, son George celebrated his "First Fiesta" on August 22nd!

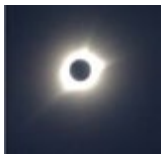


**Abby Roveda**



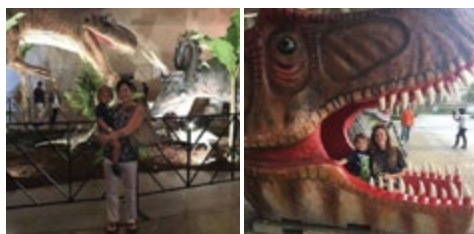
**Abby, George & David**

Emilee Shuler traveled to Lebanon, Tennessee to see the Great American Eclipse in the path of totality with Bryant Wheat and her son Finn.



**Emilee, Finn & Bryant Wheat**

Emilee Shuler and Deborah Fisher have taken Finn to Biloxi, the Mobile Convention Center, and Bamahenge in Elberta to hunt dinosaurs! If you can't tell, he loves them!



**Deborah, Emilee & Finn at the dinosaur exhibit**



**Outgoing Rotary President, Harwell Coale with John Shields**

John Shields was inducted as President of Rotary Club of Mobile-Sunrise for 2017-2018. Pictured with John is outgoing President Harwell Coale.

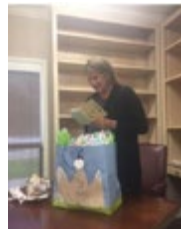
John was also selected as a member of the Federal Tax Clinic Board of Directors which contributes toward scholarships to students in the Masters of Tax program and the law school at The University of Alabama.



**Sim & Kirsten Sokom in Cambodia and Japan**

Kirsten and Sim Sokom went on an epic three-week journey to visit Sim's family in Cambodia followed by a trip to Japan. They visited many temples, ancient ruins, and manicured gardens. They had the time of their lives, and will be forever changed by what they saw and experienced!

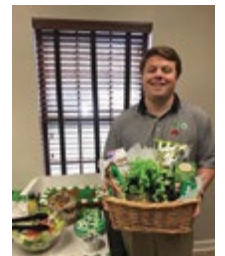
## Office FUN



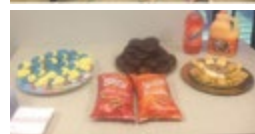
**Kristi received many great gifts for Anna Collins!**

We really enjoyed hosting a surprise baby shower for Kristi Daugherty. She received many great gifts for Anna Collins!!

We had fun celebrating St. Patrick's Day in the office. Frank Schottgen found the hidden pot of gold!



**Frank found the gold!**



**CSB employees viewing the eclipse; themed snacks for post-eclipse nourishment!**

The Great American Eclipse was a major historical event, so we made sure all of our employees had glasses to view it. There were also eclipse-themed snacks and drinks for everyone to enjoy!

Employee Liability Management (ELM) is the real MVP, dropping by our office in an ice cream truck every year!



**ELM's annual ice cream visit!**



## CSB Cares

The Mad Adders took home third place at the Eastern Shore Chamber of Commerce Young Professionals' Trivia Night! The entry fees benefitted the Chamber's youth organizations.



**The Mad Adders at Trivia Night**



**Wine, Women & Shoes event**

Some of the ladies of our team joined Blake LaMont and Hunter Young at this year's Wine, Women & Shoes, an event benefitting Camp Rap-A-Hope. They collectively raised \$2,250 for the summer camp and programs offering year-long activities for children diagnosed with cancer.

CSB Team members laced up their golf shoes for Rotary International's Inaugural Rotary Golf Classic in support of Rotary Foundation Charities at the Timber Creek Golf Club in Spanish Fort. Crow Shields Bailey was a sponsor of the tournament.



**CSB Team Members for Rotary**



**CSB was a sponsor for the Annual Bay Bites Food Truck Festival**

CSB was a sponsor of Mobile Baykeeper's annual Bay Bites Food Truck Festival! The festival was also sponsored by Sweet Water Brewing Company, and many of the best area food trucks were present. The New Orleans band Roadside Glorious provided the jams!



CSB sponsored Pencils and Glue for Bingo and Brew at Fairhope Brewing Company, hosted by the Eastern Shore Chamber of Commerce Young Professionals, of which our Andrew Bailey is a member. The event was organized to raise money and school supplies for the Chamber's youth organizations.



**Pencils & Glue for Bingo & Brew at Fairhope Brewing Company**



**Harvey donations**

Our team raised money to purchase toiletries and other necessities for the victims who lost everything in Hurricane Harvey. Some items were also donated by team members, friends, and family members. Many team members also donated to charities directly.

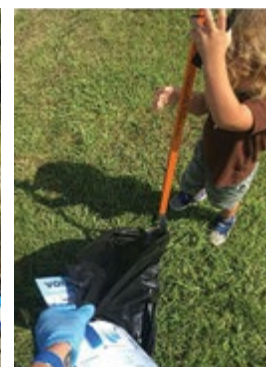
For the annual Junior Achievement Bowling Classic, our team raised \$2,200! We look forward to this event every year. Junior Achievement strives to inspire and prepare young people to succeed in a global economy through the necessary training, materials, and support to bolster their chances for success. Students who participate in Junior Achievement training programs show a deeper understanding of economics and business concepts.



**CSB team at Junior Achievement Bowling Classic**



**John & Anna Mary Shields**



**Finn Shuler**

Team Shields and Team Shuler took part in the 30th Annual Coastal Cleanup!

## Recruiting News



**CSB Mardi Gras Intern Social**

Our team had a blast at Moe's Original Bar B Que in downtown Mobile for our Mardi Gras Intern Social! We had a great view of the parade, live music, and delicious food!

Andrew Bailey, Abby Roveda, and John Gafford spoke at USA's Beta Alpha Psi meeting in September. Topics covered were standards of professionalism related to being a CPA, the evolution of the field of accounting, our firm and what it takes to be successful in public accounting.



**CSB Team speaks to USA's Beta Alpha Psi**

CSB hosted a summer social at Fairways Indoor Golf Club in Daphne for accounting students before they headed back to school!



**Back to School Summer Social at Fairways Indoor Golf Club in Daphne**

Our team loved connecting with students from The University of South Alabama at their Meet the Firms event!



**Our team at USA's Meet the Firms event**



**Back to School Bingo Social at Heroes Sports Bar & Grille**

We really enjoyed getting to know the 25 accounting students from local colleges that attended our Back to School Bingo Social at the West Mobile location of Heroes Sports Bar & Grille! The grand prizes were \$50 Amazon gift cards!

## New Team Members



**Emilee Shuler**

Join us in welcoming Emilee Shuler to our Mobile Admin Team! Emilee attended the University of Southern Mississippi and the University of South Alabama. Her specialties are administrative services, marketing, event coordination, and human resource support. Emilee is involved with Mars Hill Church, community theater, supporting and promoting local music and art, and supporting Junior Achievement and various other charities. She enjoys playing with her son Finn, writing and playing music, going

to concerts, exploring outdoors, being on the water, reading, and spending time with friends and family. **Fun fact:** Emilee has been to hundreds of concerts and festivals, and she still has a ticket stub, wrist band, T-shirt, or schedule from each one!



**Anna Spencer**

We also welcome Anna Spencer to our Mobile Admin Team! Anna graduated from the University of South Alabama with a B.S. in Finance. Anna's specialties are administrative services, marketing, and IT support. She is a member of Caswell Springs United Methodist Church and a University of South Alabama Alumni Association member. She values her close relationships with friends and family and enjoys hunting, fishing, and relaxing on the beach. **Fun fact:** Anna is a member of the small worldwide population who does not eat pizza!



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