

Beyond *the* Numbers



INSIDE THIS EDITION

New Shareholder Spotlight
Team Member News
Community Involvement
Promotion Highlight
Mid-Year Business Checklist

BEGIN YEAR-END PLANNING EARLY

Proactive planning creates more opportunities. Organizing financial records, evaluating major purchases, and discussing tax strategies now can lead to stronger decisions later in the year.

As we move through the second half of the year, thoughtful planning and proactive financial strategy remain as important as ever. Our team is here to help you navigate opportunities with confidence.

FIND A PROBLEM. SOLVE A PROBLEM.

At this year's Behind the Numbers event, students had the opportunity to hear firsthand from entrepreneur and business leader Brian Chaney, whose career journey challenged the idea that success follows a straight path.

Our event welcomed students for a day of shadowing team members, connecting with shareholders, and gaining a deeper understanding of careers in public accounting and advisory services. Throughout the day, students were encouraged to ask questions,



build relationships, and learn what life in the profession truly looks like beyond the classroom. Brian's session brought those conversations to life in an especially memorable way.

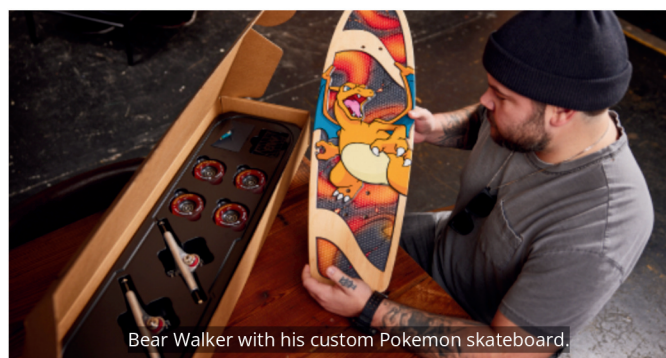


From growing up in a military family to serving in the Air Force, leading organizations through uncertainty, and helping scale businesses through periods of rapid growth, Brian shared a candid look into leadership, entrepreneurship, and the lessons that come from learning in real time. His stories were honest, often humorous, and filled with practical advice for students preparing to begin their own careers. Throughout the conversation, one message continued to surface: “Find a problem. Solve a problem.”

For Brian, that mindset became the foundation of every stage of his career. After attending Louisiana Tech University and joining the Air Force, he quickly learned that leadership rarely arrives at the “perfect” moment. Early in his military career, he was unexpectedly placed into positions that required him to adapt quickly, ask questions, and figure things out under pressure. One of his first assignments involved leading an IT program despite having a background in supply chain and operations management rather than technology. Instead of pretending to have all the answers, he focused on learning quickly and solving the problems in front of him. That willingness to adapt would continue to shape his career for years to come.

As his professional path evolved from military leadership into entrepreneurship, Brian repeatedly found himself stepping into unfamiliar territory. He shared stories of taking risks, navigating uncertainty, and leading teams through difficult moments, including periods where businesses faced significant financial pressure. One of the most impactful moments of the conversation came as he reflected on what many people perceive as “overnight success.” Behind rapid growth stories, he explained, are often years of hard work, setbacks, and persistence that few people ever see.

Brian later became involved in helping grow a skateboard manufacturing company through strategic partnerships, creative branding, and relationship-building. What began as a small operation eventually expanded into a globally recognized business working with major brands and pop culture franchises, including Pokémon. At one point, the demand surrounding a product launch reportedly crashed Pokémon Center’s website within minutes.



While the story drew laughs from students, Brian emphasized that the success did not happen overnight. Behind every milestone were years of experimentation, financial risk, and constant problem-solving.

“Every small business I’ve ever been with has had at least one near-extinction year,” he shared candidly. His transparency gave students a realistic view of entrepreneurship and leadership, one focused less on polished success stories and more on resilience, adaptability, and perseverance.

Beyond entrepreneurship, many of Brian’s strongest lessons centered around people. While technical knowledge and experience are important, he believes trust, communication, and strong relationships are what separate good professionals from great leaders. Knowledge and technical abilities may open the door, but the ability to work well with others, influence decisions, and build trust is what creates long-term success. For students interested in public accounting and advisory work, the message felt especially relevant.

Many of the same themes Brian discussed throughout his presentation are reflected daily in the work done at Crow Shields Bailey. Strong client relationships, proactive problem-solving, strategic thinking, and the ability to guide clients through challenges are all essential parts of advisory-focused professions. Public accounting is about far

more than numbers alone. It is about helping businesses navigate growth, solve problems, and make informed decisions with confidence. Brian also encouraged students to take initiative early in their careers instead of waiting for opportunities to be handed to them. Whether in internships, classrooms, or future workplaces, he stressed the importance of stepping forward, helping where needed, and learning through experience.

“Knowledge, skills, and abilities will get you the job,” Brian explained. “Soft skills help you lead and influence.”

That mindset aligned naturally with the purpose of the Behind the Numbers event itself. The day was designed not only to introduce students to career opportunities in accounting, but also to provide exposure to the real stories, challenges, and relationships behind successful businesses and professional growth.

By the end of the session, students walked away with far more than career advice. They left with a broader understanding of leadership, resilience, and the reality that most successful careers are built one challenge, one relationship, and one solved problem at a time.

And perhaps most importantly, they left with one simple piece of advice that applied far beyond business: Find a problem. Solve a problem.



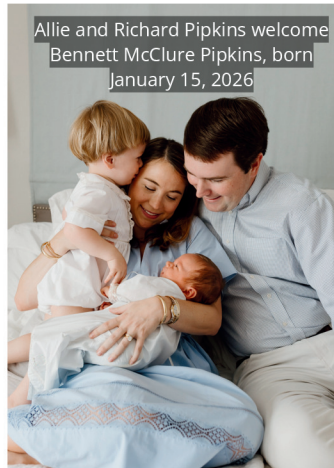
Students shadowing CSB team members at Behind the Numbers 2026



TEAM MEMBER NEWS



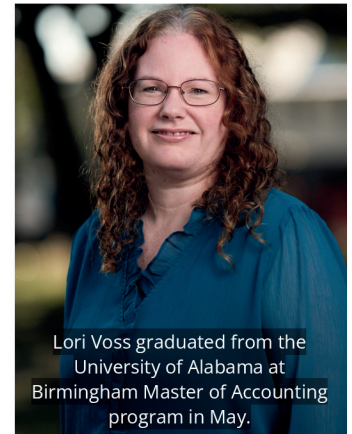
Thomas and Everette Russell welcomed Thomas "Boyd" Russell, Jr. on February 4, 2026. Gina and Pudgy McKellar welcomed their newest grandson.



Allie and Richard Pipkins welcome Bennett McClure Pipkins, born January 15, 2026.



Kenny and Mary Hannah Crow's daughter, Reed, celebrated her Baptism at St. Ignatius Catholic Church.



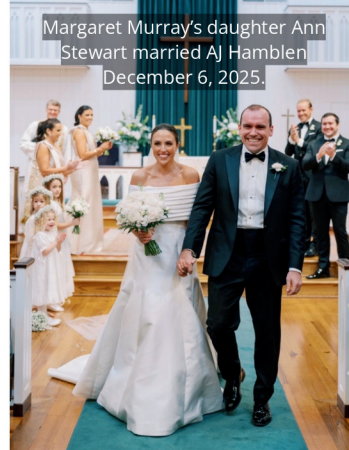
Lori Voss graduated from the University of Alabama at Birmingham Master of Accounting program in May.



Brian, Ellie and big brothers Ford and Luke welcomed Knox Mason Russell on December 15, 2025. Gina and Pudgy McKellar are proud grandparents.



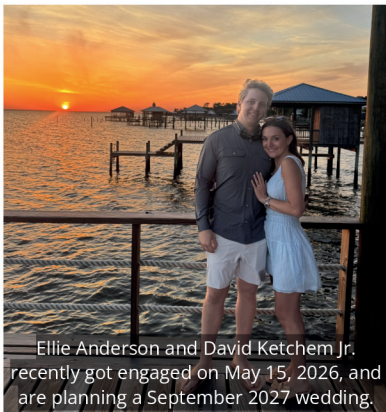
Emily Trumbaturi has moved to Mobile and welcomed a new pup, Sunny.



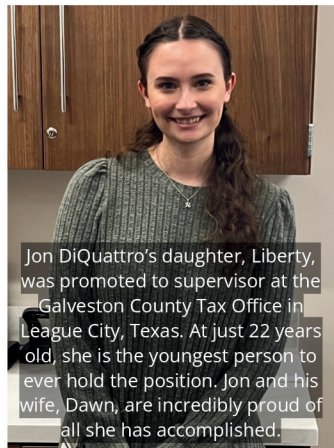
Margaret Murray's daughter Ann Stewart married AJ Hamblen December 6, 2025.



A beautiful sunset over the bay highlights the beach recently built by Kenny Crow III's father, Kenny Crow Jr.



Ellie Anderson and David Ketchum Jr. recently got engaged on May 15, 2026, and are planning a September 2027 wedding.



Jon DiQuattro's daughter, Liberty, was promoted to supervisor at the Galveston County Tax Office in League City, Texas. At just 22 years old, she is the youngest person to ever hold the position. Jon and his wife, Dawn, are incredibly proud of all she has accomplished.



Jennifer and Tiffany Lowe sold their house in Daphne and bought a new house in Foley in March 2026.



Amelie, Nikki Allen's daughter, received the Christian Attitude Award for her Corpus Christi Kindergarten Class.



Ridley and Jordan Zinner's daughter, McRae, was born December 25, 2025.



Kristi Daughtery recently attended her 30-year reunion with the Alabama Crimson Tide softball team.



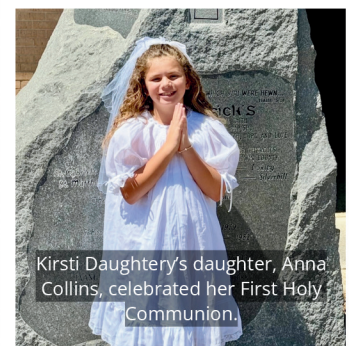
Nikki Allen's son Rex's fourth-grade Corpus Christi soccer team won the D4 CYO Championship.



Emilee Shuler married Steven Mann on March 27, 2026, at Cheaha State Park in Alabama.



Andrew Bailey and his wife, Jenny, welcomed their son, Andrew James Bailey Jr., on September 15, 2025.



Kirsti Daughtery's daughter, Anna Collins, celebrated her First Holy Communion.



Community Involvement



Crow Shields Bailey featured in The Scout Guide for our construction-focused services



Kenny Crow serves as the Treasurer and on the Advisory Board of St Ignatius Catholic School. Additionally he serves on the board of The Community Foundation of South Alabama



Gina McKellar & Georgianna Patrasc win their division at Pickle with a Purpose supporting Distinguished Young Women



Congratulations to Ellie Anderson, who earned her CPA certification in November 2025 after passing all four sections of the CPA Exam on her first attempt.



Kristi, Abby, Sam, & Kirsten attend the Celebrate Life in support of the Thomas Hospital Foundation



Alex, Emily, Jessica, Kristi, and Nikki supporting the YMCA and the charitable work they do in our community



Students & Client Guest Speaker, Brian Chainey, joining us for the Behind the Numbers Event.



Team members attended the Ronald McDonald House Charities LBD event, proudly sponsored by CSB. Brooke Bunting participated as a model.



Andrew Bailey and Kirsten Sokom awarded Best In State Top CPA by Forbes



Joey Bailey & Kenny Crow supporting St. Ignatius Parish in their annual golf tournament



Nikki Allen will be serving on the Corpus Christi School Advisory Council's Finance Committee.



Team members supporting Fostering Together in a Top Golf Tournament

Chase, Emily, Adrienne, Emily, Britney, Cairo and Jessica.



NEW SHAREHOLDER SPOTLIGHT

Kirsten Sokom, CPA



Kirsten specializes in audit services for construction, manufacturing, and distribution companies, with a strong focus on engagement quality control and best practices. A graduate of the University of South Alabama, she is passionate about delivering exceptional client service and helping businesses navigate challenges with confidence.

Outside of the office, Kirsten stays actively involved in the community through organizations including the Thomas Hospital Foundation, the Mitchell College of Business Accounting Advisory Board, and Distinguished Young Women. She and her husband, Sim Sokom, are parents to Nathan and Lena. In her free time, Kirsten enjoys traveling, hiking, and spending time with family.

RECENT PROMOTIONS

Chase Sutherland



Senior Tax Accountant

Jon DiQuattro



Senior, Client Accounting Services

Cairo Plauche'



Senior, Client Accounting Services



MID-YEAR BUSINESS CHECKUP

Is Your Business Ready for the Second Half of the Year?

Use this quick checklist to evaluate key areas of your business and set yourself up for a strong finish to the year.

Financial Health

A clear understanding of your financials helps you make informed decisions and stay on track with your goals.

- ☐ Review year-to-date profitability
- ☐ Compare actual results to budget
- ☐ Update cash flow projections

Tax Planning

Strategic planning now can help minimize your tax liability and maximize your bottom line.

- ☐ Estimate year-end tax liability
- ☐ Evaluate equipment purchases and timing
- ☐ Review retirement plan contributions

Operations

Efficient operations and strong processes help your business run smoothly and scale successfully.

- ☐ Assess staffing needs heading into Q3/Q4
- ☐ Review pricing and strategy and margins
- ☐ Update key performance indicators (KPIs)

Technology & Security

Protecting your data and systems is essential to safeguarding your business and your clients.

- ☐ Confirm all financial data backups are running properly
- ☐ Review cybersecurity procedures and access controls
- ☐ Update software, logins, and password protocols

Your CSB team is available to help you evaluate opportunities and challenges before year-end planning season begins.



Thank You for Reading

CONNECT WITH US



www.csbcpa.com

MOBILE OFFICE

3742 Professional Parkway
Mobile, AL 36609
p: (251) 343.1012

FAIRHOPE OFFICE

24190-C US-98
Fairhope, AL 36532
p: (251) 621.1106

GULF SHORES OFFICE

1550 W 2nd Street Unit G
Gulf Shores, AL 36542
p: (251) 968.4337

Professional guidance. Personal relationships. Local roots.