

COMMUNITY

2024 LIFE AT YHB



THE NEVER NORMAL

The Never Normal – It's been a phrase I have been hearing a lot this year. It's a term that resonates differently with each of us, reflecting the unique challenges and opportunities we've encountered.

In my role as CEO, I've had the privilege of witnessing the remarkable growth and evolution of our Firm over the past year. We've embraced new opportunities and faced numerous challenges head-on, adapting and overcoming obstacles with resilience and determination. The dynamic nature of our journey has not only defined our identity but has also paved the way for a renewed commitment to you, our community.

The fruit of this commitment from this past year has been YHB achieving a remarkable milestone – becoming a Top 100 Accounting Firm. While this recognition highlights our pursuit of excellence, our focus remains unwaveringly on our team, you, and the communities we serve. As we grow and solidify our position as one of the largest firms in the U.S., our dedication to being a supportive community partner remains resolute. This achievement reaffirms our pledge to deliver exceptional service while fostering deep connections within the communities integral to our shared experience.

I am pleased to share with you the latest chapter in our story – a story that reflects our team's dedication to making a positive impact beyond the walls of our organization. Each year, YHB team members set out on a path of giving back to the community, which has been a key part of our culture.

In this newsletter, you will discover the various ways in which YHB is actively contributing to our community. From philanthropic endeavors to sustainable initiatives, we are excited to share our vision for creating lasting positive change.

We understand that our success is intrinsically linked to the support we receive from our community. This is our way of expressing gratitude and fostering a spirit of collaboration that goes beyond business transactions. YHB's commitment to community giving is a testament to our belief that together, we can build a stronger, more compassionate society.

Thank you for being an integral part of the YHB family. Together, let's embrace The Never Normal with open minds and a shared commitment to making a positive difference.



Sincerely,

A handwritten signature in black ink that reads "Thomas L. Milburn".

Thomas L. Milburn



BY THE NUMBERS

We are dedicated to your empowerment. Our team goes above and beyond, investing countless hours to equip you with the knowledge to truly thrive. Whether it's through engaging newsletters, impactful webinars, or recruiting passionate individuals committed to serving you, we're excited to showcase the incredible impact we've made together last year.



55k+
FRIENDS OF YHB
READ OUR E-MAILED
NEWSLETTER



3,200+
GUESTS
ATTENDED YHB
HOSTED EVENTS



23
YHB HOSTED
SEMINARS &
WEBINARS



169
ARTICLES
POSTED TO THE
YHB WEBSITE



64k+
COMMUNITY
MEMBERS READ
OUR BLOGS



53
NEW EMPLOYEES
JOINED THE YHB
TEAM



26
FUTURE
EMPLOYEES
EXPERIENCED
YHB'S INTERNSHIP



144
BREAKING
NEWS & UPDATE
EMAILS SENT

EMPOWERING YOU

At YHB we believe in equipping our community with the tools for success. You can access our informative events and insightful newsletters throughout the year. Learn how to tap into these resources and empower your journey.



Webinars



Scan to Learn More



Join our monthly webinars where we cover essential topics like key performance indicators and quarterly tax impacts. Empowering you with knowledge, our diverse webinar series brings the latest insights to you every month. Be sure to find past recordings in our library under the *Events* tab on the YHB website.

GJ Wealth Advisors



GLASS JACOBSON
WEALTH ADVISORS

YHB's relationship with GJ Wealth Advisors provides financial planning and wealth management solutions to our clients. This gives our clients access to premier financial solutions from a team of experienced professionals who share the same values as YHB.

Articles



Scan to Learn More



Access cutting-edge content on industry-specific topics and individual tax updates. Dive into this exclusive resource on our website or get it delivered straight to your inbox by subscribing to our newsletter.

Symposiums



Sent by Invite

We are pleased to offer our clients in-person educational and networking events throughout the year. Among our notable events are the annual Not-for-Profit and AEC Symposiums, which have become a regional mainstay traditionally held in the summer.



MAKING AN IMPACT

Over the past year, our team has amplified efforts to express gratitude. We cherish the privilege of serving our clients and contributing to each community. As both an organization and individuals, we take pride in contributing to the betterment of our region. We're delighted to share some of these stories with you.



Empowering Through Therapeutic Riding

Connor Oakes, Audit Manager based in our Richmond office, serves as a therapeutic riding instructor at Hazelwild Farm in Fredericksburg, VA. She dedicates her time to teaching three lessons a week, servicing approximately 15 riders who face a range of physical and cognitive disabilities.

Enriching Education & Building Community

Katelyn Poffinberger, Tax Supervisor based in our Winchester office, serves as President of the PTO at Evendale Elementary School, where her children attend. Evendale Elementary is a Title I school, serving a significant number of students from low-income households. Katelyn and her PTO team work to raise funds that enrich the educational experience for all students. They sponsor teacher grants, school assemblies, field trips, and provide essential supplies for the school. Additionally, they organize free community engagement events for families throughout the year.



Honoring History & Unity at YHB

In celebration of Juneteenth, YHB's NOBA (Network of Black Accountants) and the Diversity Council organized a series of events. YHB recognized the historical significance of the day by closing our offices on June 19th. Staff were encouraged to watch the movie 'Loving,' which portrays the journey of Richard and Mildred Loving, whose case led to a landmark Supreme Court decision. A Juneteenth discussion was then held to explore the history of Juneteenth and the pivotal Loving v. Virginia case. Additionally, lunch was catered to each office from a local black-owned restaurant. These events aimed to educate, commemorate, and foster unity among YHB's team members.



Guiding Sorority Alumni

Grace Champion, Tax Associate in our Falls Church office, volunteers as the Alumni Finance Advisor for her sorority's chapter at American University. In this role, Grace contributes to the development of young women by focusing on financial literacy, leadership, and interpersonal skills.



Helping Children

Robin Santmier, Tax Paraprofessional working remotely, manages a bi-monthly outreach program named "Tabitha's Closet." This initiative involves distributing free diapers, wipes, and clothing ranging from newborn to size 5. Diapers and wipes are generously provided by a local church, while donations support the clothing, baby accessories, and toys. The outreach serves approximately 30 to 60 children each time it opens.

Supporting Breast Cancer Awareness

In honor of Breast Cancer Awareness Month, YHB continued to pay tribute to our late colleague, Rose Wagner, and those affected by cancer and health challenges. Throughout October, total sales of pink clothing and pink ribbon items in our internal store were matched by YHB with a donation to the Breast Cancer Research Foundation.

Entry for a Cause – YHB Wellness

Entry for a Cause was part of our 2023 wellness programming. It also aligned with our commitment to the communities we serve and to our employees' wellbeing! YHB reimburses employees for an entry into a fitness event that supports a community cause. This year we had YHB teams from across the region participate in this program.

Empowering Families

Sarah Hegenbart, Tax Manager in our Winchester office, has been a foster parent since 2017, providing a home for 24 children and officially adopting one, with another unofficial adoption. She serves on the board of the Monarch Family Support Center, a grant program that aids families and individuals in need, offering essentials like food, clothing, furniture, and helping them access community services for housing, employment, childcare, and more. Sarah also plays a role in training new kinship and resource foster families through the West Virginia Department of Health and Human Resources PRIDE program.



Wellness Summer Challenge

YHB's 2023 Fitness Challenge was a firm-wide program designed to promote friendly competition and assist staff in achieving their fitness goals. It was an all-inclusive event open to all YHB employees and their families, held for a total of six weeks between May and June. Participants tracked their active minutes, formed teams, and utilized fitness devices to monitor their progress throughout the challenge.



Day of Caring for Girls on the Run

This year, YHB's Winchester offices continued their community involvement by participating in the United Way of Northern Shenandoah Valley's Day of Caring. On September 22nd, several of our staff represented YHB and supported Girls on the Run: Shenandoah Valley with their fall inventory project, assisting in preparations for their upcoming Fall 5K.



A YEAR IN REVIEW

YHB Welcomes Two New Principals

February

The shareholders of YHB voted to admit Christen Orndorff, CPA and Ben Sandala, CPA as Principals in 2023. Both are a part of our Tax Team, with Christen working out of our Leesburg office and Ben out of our Middleburg office.



2023 Annual Not-for-Profit Symposium

June

YHB hosted our annual Not-for-Profit Symposium, which featured a full day of engaging speakers at West Oaks Farm Market in Winchester.



2023 Annual Construction Symposium

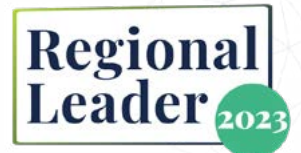
May

At YHB's annual Construction Symposium, attendees had the opportunity to hear insights into the state of the industry and its future direction. The event kicked off with a networking function at the Fredericksburg Nationals baseball game on May 31st, followed by the symposium on June 1st, held at the Fredericksburg Expo Center.



Milestones Reached Through Your Support

We are so grateful for the community and clients that have allowed us to continuously grow throughout the past 76 years. This growth has led us to become a Top 100 Firm in the nation, in addition to being a regional leader in the DC Metro Region. We cannot thank you all enough for the steadfast support you have shown our team members and firm.



YHB Goes “Out of this World” at Annual Firm Day

June

YHB’s annual Firm Day, themed “Out of This World,” was held in movie theaters across Virginia and Maryland, bringing together offices for a day of team building. Staff enjoyed a celebration, recognizing the achievements of our team members. Designed to foster a sense of community, the event featured lunch and a happy hour, ensuring a memorable blast-off for staff.



YHB Welcomes Two Directors

September

The shareholders of YHB voted to promote Nicholas Preusch, CPA, JD, LL.M. and Stephen Weber, MBA, CISA to Directors in 2023. Nick is a part of our Tax Team, while Stephen is on our Risk Advisory Services Team. Both Nick and Stephen work out of our Richmond office.



Baltimore Business Journal’s Fast 50 Awards List

October

YHB is proud to announce its inclusion on the prestigious Baltimore Business Journal’s Fast 50 Awards list.



Named in The Top 50 Construction Accounting Firms

YHB was named amongst Construction Executive’s The Top 50 Construction Firms™ 2023 national ranking.



Recognized as a 2023 “Top Employers for Interns”

YHB was selected as a recipient of the 2023 “Top Employers for Interns” Award by Virginia Talent + Opportunity Partnership (V-TOP) and the Region 8 Valley Internship Experience Workgroup (VIEW).



Business Development Program Advances

Our Marketing team kicked off another year of our Staff Business Development Program with 24 managers and supervisors across the Firm. Team members will spend the year learning various marketing strategies and how to foster growth in their roles. The program runs through May and includes 8 interactive sessions.

EMPLOYEE RESOURCE GROUPS



Over the past year, our workplace has seen a surge in the growth and impact of our Employee Resource Groups (ERGs) and Affinity Groups (AGs). These employee-led communities serve as vital pillars in our diversity, equity, and inclusion journey. We are pleased to provide an update on the remarkable strides and profound influence these groups have had across YHB!

LGBTQIA+

Led by Supervisor Bryan Rapp from Richmond, the ERG promoted inclusivity and acceptance. From Pride Month-themed trivia to engaging with leadership on diversity initiatives, they've worked to create a supportive environment. Endeavors like the YHB Pride Store, Pride Progress flags, and LGBTQ+ ERG stickers mark significant strides in fostering understanding and celebrating diversity within the YHB community.

"Grateful for LGBTQIA+ ERG; Unity and diversity strengthen YHB's workplace." - Bryan

Mental Health

Led by Co-Chairs Colleen Breuning and Jessica Both, the ERG touched every YHB team member this year. Their mission was to create a space for open mental health discussions, break down stigmas, and provide support. In their inaugural year, the ERG hosted two mental health training events, shared awareness posts, established a code of conduct for ERGs, and organized an Act of Kindness Challenge.

"Privileged to lead Mental Health ERG; YHB's dedication shows care and concern for mental health." - Jessica

Sustainability

Chaired by Rebecca Crews, a Paraprofessional in Winchester, the Sustainability ERG drove eco-friendly initiatives to promote a more sustainable future at YHB. They included educating on pumpkin disposal, establishing the YHB Swap Meet, distributing wildflower seeds for Earth Day, and introducing recycling programs for batteries and aluminum can tops in select offices.

"In the Sustainability ERG, we implement ideas to help the planet and motivate colleagues for eco-friendly actions." - Rebecca

Parents

In its first year, this ERG focused on mutual support and sharing experiences among parents at YHB. For example, the chair of this group, Nick Preusch, utilized the firm's Web MD benefit during a health concern with his child and was able to share his experience with the group.

"I love how parents can come together to help each other out while sharing all the fun and issues that pop up in parenthood!" - Nick

Women

Co-Chairs and Principals Darlene Gerstmyer and Dorrie Franzello-Kurtz, organized Women's Empowerment Day, bringing together 50+ women from various levels within the firm. The event featured a panel discussion and a collaborative group exercise, emphasizing career growth, goals, satisfaction, and work-life balance.

"The group is a space for YHB women to connect, share experiences, and support each other both personally and professionally." - Darlene

NOBA

Our Network of Black Accountants, led by Co-Chairs Carleigh Marshall and Sheriene Harris, celebrated Black History month and hosted another Juneteenth Lunch and Learn event. They proudly collaborated with National Association of Black Accountants (NABA) by participating in their Accounting Career Awareness Program (ACAP) by leading a presentation, awarding two scholarships to ACAP students, and sending two representatives to NABA's national convention in June.

"NOBA made great strides to aid the community and educate the firm on black history. I am excited for our plans for the future" - Sheriene



LEADING OUR TEAM

As YHB forges ahead in our pursuit of improving client experiences, we realized adapting our structure to support this was pivotal. In 2023, YHB Principals decided to assure we could deliver on this promise by voting to establish Practice Leads for each department.

These leaders are wholly devoted to empowering our team members with the essential tools and cutting-edge training required to consistently provide unparalleled service to you. They are at the forefront of driving innovation, ensuring YHB remains at the vanguard of groundbreaking solutions and services.



Assurance Practice Lead

Matthew Smith, as the Practice Lead for YHB's Assurance Department, boasts a career defined by leadership and mentorship, guiding team members towards best practices while pioneering innovative approaches to client engagements. Matt is renowned in the AEC industry and a sought after speaker.

"Our Assurance team has always been industry leading, I am excited to help keep driving our innovative spirit."



Tax Practice Lead

Elaine Cain leads our Tax Department as the Practice Lead, boasting a tenure with YHB since 1994. Elaine is renowned for her exceptional expertise in Private Client and Estate Planning services. She has also significantly shaped the direction and growth of YHB through her contributions on YHB's Board.

"Our team's passion for our clients fuels a pioneering drive that's simply contagious."



Client Accounting & Advisory Services Practice Lead

Dorrie Franzello-Kurtz is the Practice Lead behind YHB's newest department, Client Accounting & Advisory Services (CAAS), formally established in 2023. Dorrie continues to lead the charge in revolutionizing how we offer fractional CFO and outsourced accounting solutions.

"The CAAS department is excited to better serve our clients' accounting needs with more comprehensive solutions."



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