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For Immediate Release

CBM Partner Julia Lafferty Elected to the Greater Washington Society of CPAs Executive Committee

July 12, 2022 (Bethesda, MD & Washington, DC) – Julia Lafferty, CPA, a partner at Councilor, Buchanan & Mitchell and a director of the firm’s not-for-profit and employee benefit plan services groups, has been elected to the executive committee of the Greater Washington Society of CPAs (GWSCPA) effective July 1, 2022. This five-year commitment will incorporate several progressive leadership roles including annual service as secretary, treasurer, vice president/president-elect, president and immediate past president.

During her involvement, CBM has expanded its participation in GWSCPA’s programs and conferences including its annual membership meeting, nonprofit symposium, employee benefit plan conference and women’s leadership conference. She has played a direct role in programming by serving as chair of the 2020 GWSCPA nonprofit symposium and the 2022 employee benefit plan conference, and by speaking at or serving as a panelist for many of these professional development events.

“GWSCPA has been an important part of my career,” said Lafferty. “With updated accounting standards, federal legislation and other industry developments impacting the work of public accountants and in-house finance professionals, it’s important to have an engaged community collaborating to ensure we can continue to offer the very best to our clients.”



Julia Lafferty, CPA

Lafferty and CBM have provided sponsorship support over the years for GWSCPA’s women’s leadership conference and nonprofit symposium, and team members regularly participate in meetings for GWSCPA’s nonprofit committee, women’s leadership committee and nonprofit accounting basics committee.

CBM PARTNER JULIA LAFFERTY ELECTED TO THE GREATER WASHINGTON SOCIETY OF CPAS EXECUTIVE COMMITTEE

July 12, 2022

At CBM, Lafferty delivers audit and consulting expertise to the not-for-profit sector, an industry she has served for more than 30 years. She also helps direct the firm's delivery of employee benefit plan services, a valuable service for clients and others. Finally, Julia helps lead the firm's recruitment program, working with human resources to ensure talented new accounting professionals have the chance to start a promising career at the firm.

"Julia has dedicated many years to serving the Washington, DC metropolitan area accounting community and this GWSCPA leadership opportunity reflects that commitment," said Daniel L. Weaver, president and managing partner of CBM. "She will ultimately join the ranks of seven other CBM professionals who have served as president of GWSCPA since our founding and we could not be prouder."

About CBM

*** CELEBRATING MORE THAN 100 YEARS OF EXCELLENCE ***

Councilor, Buchanan & Mitchell, a full-service tax, accounting and advisory business, has provided professional services to clients in the Washington, DC area and throughout the Mid-Atlantic region since 1921. CBM is committed to providing exceptional financial solutions to ensure clients' success, cultivating a diverse and collaborative team, and leaving a lasting positive impact in our communities. The firm serves not-for-profit organizations, automotive dealerships, professional services firms, construction and real estate groups, family-owned businesses and other businesses, and delivers financial planning, and litigation and divorce financial services. CBM's subsidiary MBI, LLC, is a fee-only wealth management advisory firm that offers comprehensive financial planning and investment management services.

Awards and Recognition

- Top Regional Leaders, Accounting Today, 2020 and 2021
- #6 Metro-Area Giving (Small Businesses) – Corporate Philanthropy, Washington Business Journal
- #5 Metro-Area Volunteer Hours (Small Businesses) – Corporate Philanthropy, Washington Business Journal
- Top Financial Advisor (Debbie May), Washingtonian Magazine, 2021
- Top 25 Accounting Firm in the Region, Washington Business Journal, 2018, 2019, 2020
- Top 300 Firms / Fastest Growing Firms, INSIDE Public Accounting, 2020
- Top Firm for Equity Leadership, Accounting & Financial Women's Alliance, 2019, 2020
- Ruth Coles Harris Advancing Diversity & Inclusion Award (Pat Drolet), Virginia Society of CPAs, 2020
- Managing Partner of the Year (Peter Reilly), Rainmaker Companies, 2019