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*For Immediate Release*

## **Councilor, Buchanan & Mitchell Manager Reema Patel Graduates from Upstream Academy's Emerging Leaders Academy**

**August 1, 2023 (Bethesda, MD)** – Reema Patel, a manager at Councilor, Buchanan & Mitchell (CBM), a full-service professional accounting and advisory firm, graduated from the Upstream Academy's Emerging Leaders Academy, an industry-recognized program to develop emerging leaders from within the accounting industry. During a rigorous training and educational initiative, Patel focused on developing a business plan for delivering financial planning expertise to younger, higher-earning professionals using a subscription model. She collaborated closely with CBM's wealth management and financial planning group.

"It was a great learning experience," said Patel who also participated in instructor-led trainings, peer dialogue and other hands-on projects to address current issues in the accounting industry during the two-year program. "My knowledge has expanded in areas of market awareness and leadership that I might have found challenging to cultivate elsewhere."

Her project leadership included reviewing software to reduce manual entry of deliverables, evaluating local groups of younger professionals and increasing participation in financial planning and brainstorming meetings at CBM. She also met several potential clients.



Patel is the second graduate from the academy's Emerging Leaders Program in the past year. In 2022, Dan Keefer, a partner at the firm, graduated from the Emerging Leaders Academy based on a project he invested in developing training videos for staff in CBM's automotive dealership group.

"Our professionals continue to excel in developing their leadership talents," said Daniel L. Weaver. "We're proud of Reema's accomplishment and know our clients will benefit from it."

The Upstream Academy helps accounting firms find innovative and proven solutions for today's challenges and proactively plan for tomorrow through educational and coaching programs.

# **CBM MANAGER REEMA PATEL GRADUATES FROM UPSTREAM ACADEMY'S EMERGING LEADERS ACADEMY**

August 1, 2023

## **ABOUT COUNCILOR, BUCHANAN & MITCHELL**

### **\* 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, May Barnhard Investments, LLC, is a fee-only wealth management advisory firm that offers comprehensive financial planning and investment management services.

### **Awards and Recognition**

- Regional Leaders – Capital Region, Accounting Today, 2021, 2022, 2023
- 25 Largest Accounting Firms, Washington Business Journal, 2018-20, 2023
- Top 300 Firms, INSIDE Public Accounting, 2019, 2020, 2021, 2022, 2023
- Top Places to Work, Bethesda Magazine 2022
- Best Firm for Equity Leadership, Accounting MOVE Project, 2019, 2020, 2021, 2022
- Top Corporate Philanthropist, Washington Business Journal, 2020, 2021
- Fastest Growing Firm, INSIDE Public Accounting, 2020