



Smith Marion & Company, LLP

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Smith Marion & Co. 2014 Client Workshop

May 27, 2014—Smith Marion & Co. held their 2014 Client Workshop on Friday May 16th at 9am at the San Bernardino Hilton. The speakers were Smith Marion & Co. experts; Partner – Chad Porter, Senior Manager – Janet Smith, Senior Associate – Roxanne Garcia, Manager – Kendra Dockham and Manager – Jeri Christopher. The topics included Non-Profit Form 990 News and GASB 60-69 & A-133 Updates, in order to inform clients and keep them up-to-date on changing policies.

Smith Marion & Co. Partner – Chad Porter said, “It was great to see the clients in person, I am always excited to help our clients stay at the forefront of accounting and tax issues. I look forward to a successful year with our clients and next year’s Client Workshop.”

ABOUT SMITH MARION & CO., LLP

Smith Marion & Co., LLP was founded in 1983 by William P. Smith and David B. Marion. Over the last several years, the company has experienced tremendous growth. In November 2012, the firm merged with Streit and Peters, CPAs, a California firm. Marion credits their staff of high-quality, committed professionals, who have invested in their training, development and growth, to the success of the company. The firm also takes pride in the growth of their client base, which has grown mainly from positive client referrals. The firm is licensed to operate in California, Tennessee, and Kentucky, with practice privileges in Idaho and Utah. The company services clients nationwide.

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