



emboldening people to **thrive**

ANNUAL REPORT 2024

 SweeneyConrad

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Letter from Sam



On behalf of our entire team, I'm pleased to present Sweeney Conrad's 2024 Annual Report. This year has been one of growth and transformation, as we've expanded our services while staying true to our core principle of putting people first.

Our focus this year has been on empowering our team to thrive—through career development, personal fulfillment, and meaningful client relationships. We've also prioritized innovation, continually investing in technology to stay ahead of the curve and deliver the best solutions.

While we faced challenges, including increased demand for services and a shortage of accountants, we've responded by fostering a supportive work environment and partnering with outsourced providers to maintain high standards. Looking ahead to 2025, we're energized to meet the future with renewed commitment to helping our clients achieve their goals.

Thank you for your continued trust. We look forward to a successful year ahead.

Sincerely,

A handwritten signature in black ink, appearing to read "Sam North". The signature is fluid and cursive, with a small "CEO" written at the end.

Sam North, CPA
CEO, Sweeney Conrad

People First Accounting

141 EMPLOYEES 	61 CPAs 
2024 BEST PLACES TO WORK <i>Puget Sound Business Journal</i> 	1 LOCATION 
	2024 FASTEST GROWING PRIVATELY-OWNED COMPANY <i>Puget Sound Business Journal</i>

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Craig Looper
PRINCIPAL, DIRECTOR OF AUDIT & ACCOUNTING

Our Audit & Assurance Services teams continues to be a cornerstone of our service offerings at Sweeney Conrad. In 2024, the team focused on refinement, elevating client engagements, and delivering exceptional service while maintaining a commitment to continuous improvement.

While the general audit team maintained its high standards, we also saw a significant transition within our Employee Benefit Plan group. Michelle Gartner took on a leadership role, and we are excited to witness the innovative developments and growth of this practice under her guidance.

As part of our ongoing specialization efforts, we've deepened the collaboration between our business development and tax/audit teams. While we've always worked closely, this enhanced focus on industry groups has allowed us to create more efficient cross-service teams, fostering richer expertise, stronger communication, and continued improvements in client service.

Looking ahead, we are confident that our audit team will remain a pivotal driver of Sweeney Conrad's growth and success in the future.



CONSTRUCTION



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& DISTRIBUTION**



**PROFESSIONAL
SERVICES**



REAL ESTATE



TECHNOLOGY



**EMPLOYEE
BENEFIT PLANS**

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Craig Connell
PRINCIPAL, DIRECTOR OF CAAS

Our Client Accounting & Advisory Services (CAAS) team experienced remarkable growth and development throughout 2024. The addition of Blair Bezushko brought a sharper focus to our fractional CFO consulting services which have become an invaluable resource for many of our small and medium-sized business clients.

Throughout the year, the CAAS team has continued to refine its processes, positioning itself as the ideal outsourced accounting partner for our clients. By specializing in key industries, much like our tax teams, we've been able to deepen our expertise and enhance the quality of service provided to our diverse client base.

As AI and emerging technologies reshape the business landscape, we are confident that our CAAS team will be an essential partner in helping businesses evaluate and expand their financial tech stack.

Looking ahead, the CAAS team will play a vital role as accounting policies evolve, providing our clients with the support they need to stay ahead of best practices for bookkeeping and reporting.



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TECHNOLOGY



FAMILY OFFICE

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Marty Brown
PRINCIPAL, DIRECTOR OF TAX

In 2024, our tax teams approached the year with enthusiasm and expertise; effectively navigating ongoing questions about key tax policies, including the Washington State Capital Gains Tax. We ensured timely preparation and as well as proactive tax filing across our client base.

Throughout the year, we welcomed many new faces to the tax team and are excited about the firm's overall growth. This expansion has allowed us to further specialize and differentiate our tax teams to better serve our clients' unique needs and industries.

We are also proud of the vertical growth of our staff. This year we welcomed Naomi Gerbatsch to the principal group. Her international tax expertise is a fantastic asset to the firm and our clients.

As we transition to 2025, we look forward to continued growth and specialization within our tax teams. A new administration in the White House means numerous complex adjustments and updates to tax policy. We are already working hard to provide our clients with information on what to expect over the next few years of tax planning.



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HIGH NET WORTH
INDIVIDUAL



Congratulations, Naomi!



Naomi Gerbatsch
PRINCIPAL, TAX

Specializing:

- International Tax Compliance and Planning
- Individuals, S Corporations, Trusts, Nonprofits
- Foreign Business Reporting and Tax Credits

We are excited to announce Naomi Gerbatsch's promotion to Principal at Sweeney Conrad! With over 10 years of experience, Naomi specializes in international tax compliance and planning, working with individuals, S corporations, trusts, and nonprofits. Her expertise in complex areas like foreign business reporting, form 5471s, and foreign tax credits has consistently benefited clients, particularly those navigating multi-national tax issues.

Naomi's personal approach to client relationships sets her apart. She excels in offering clear, actionable advice on the complexities of American tax systems, helping clients manage challenging international tax situations. Her promotion is a reflection of the trust and success she has built over the years. We look forward to her continued leadership and the exceptional service she will provide to our clients moving forward.

Looking Forward



Sam North



Melanie Abigania



Marty Brown



Craig Connell



Duke Eide



Michelle Gartner



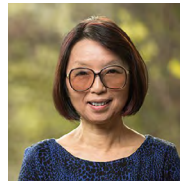
Naomi Gerbatsch



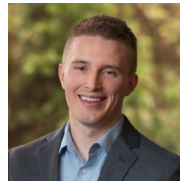
Justin Hoffman



Shauna Hovancsek



Jane Huang



Thomas Jones



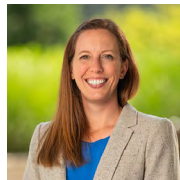
Greg LaCombe



Chris LeRoux



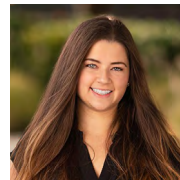
Craig Looper



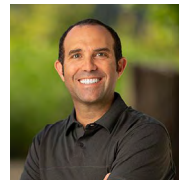
Stacey Monson



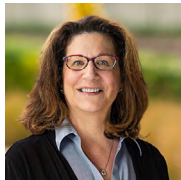
Bea Nahon



Michelle Peters



Jeff Piha



Dorothy Roer



Greg Roer



Wende Wadsworth

2024 was another successful year for Sweeney Conrad. We saw continued growth, welcomed new team members, and stayed focused on providing exceptional service to our clients.

Looking ahead to 2025, we are excited and motivated for the opportunities that lie ahead. With a growing team and the ongoing trust of our valued clients, we're confident in our ability to continue providing the high-quality service you expect.

Thank you for being a key part of the Sweeney Conrad family. We look forward to serving you in 2025 and beyond.

Stay Informed

At Sweeney Conrad, we believe in keeping you up-to-date with the latest financial news and insights. Below are some of the ways you can stay in the know:

Breaking Financial News Updates

Stay informed with breaking news from the IRS, WSDOR, and updates from Washington D.C. We also provide important reminders for key regulatory deadlines to help you effectively manage both your personal and professional finances.

Five Minute Fridays

Every week, our *Five Minute Friday* delivers easily digestible content that's both insightful and inspiring. It's also a great way to get to know the Sweeney Conrad team and stay engaged with us.

The Planner

Our monthly Estate Planning email, *The Planner*, offers valuable insights to guide your long-term financial decision-making, helping you make informed choices for your future.

Full Disclosure

Our *Full Disclosure* newsletter, shared monthly by our Audit Team, provides key news and insights that can help you streamline financial reporting and management.

Retirement Reporter

The *Retirement Reporter* keeps you up to date with the latest advice on 401(k)s, other retirement plans, and audits, helping you stay on track with your retirement goals.

Other Sources

Subscribe to our [newsletters](#)

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