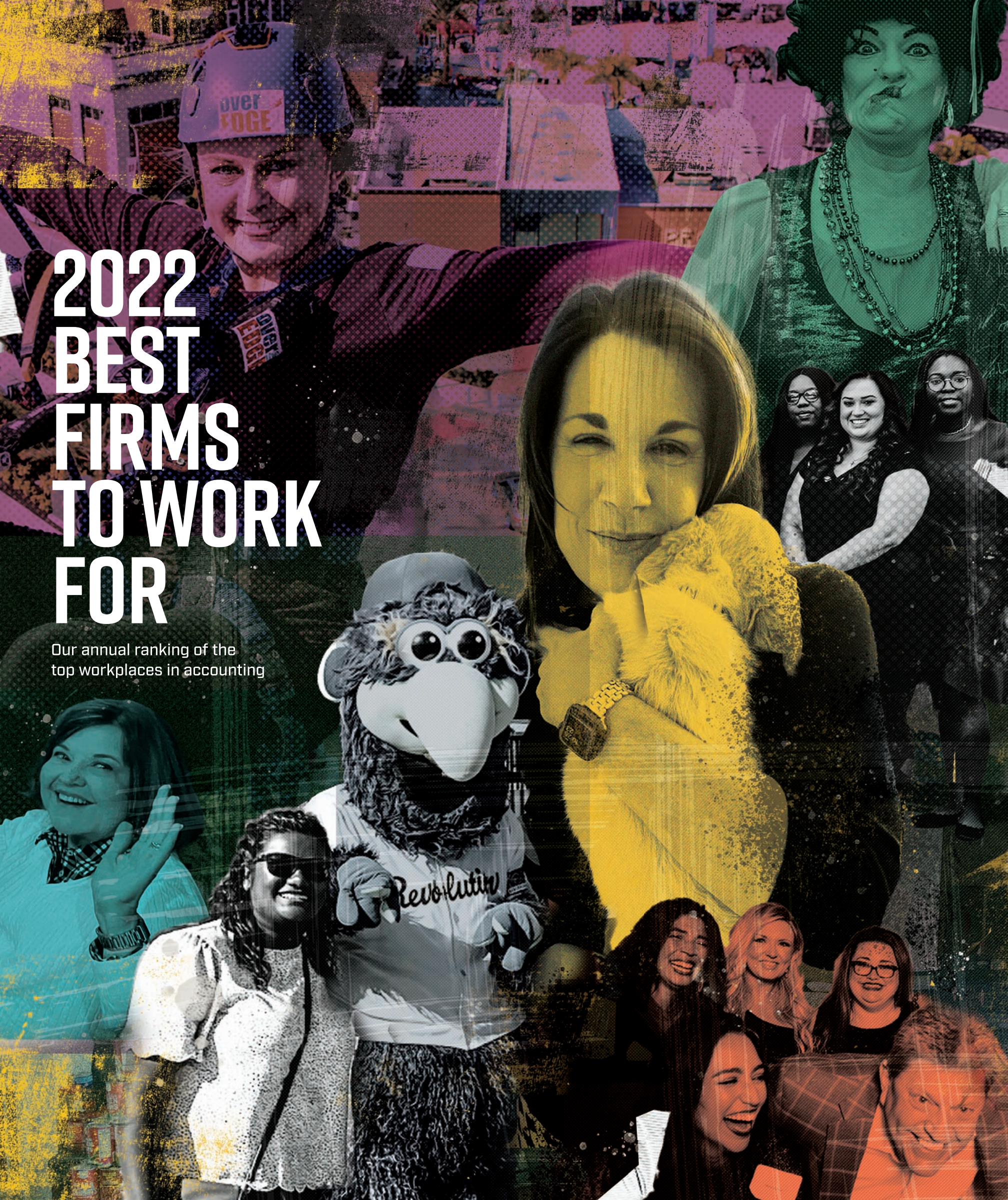


# 2022 BEST FIRMS TO WORK FOR

Our annual ranking of the  
top workplaces in accounting







Staff members at Maxwell Locke & Ritter, No. 1 Best Firm to Work For in the Medium Category

# Power to the people

The 2022 Best Firms to Work For give their staff the freedom to succeed

By Danielle Lee

It's not just employees reporting a positive work experience that lands accounting firms on *Accounting Today's* 2022 Best Firms to Work For list — via anonymous surveys conducted in partnership with Best Companies Group — but the fact that, for the majority of these exemplary workplaces, the feedback typically doesn't come as a surprise, given their continuous efforts to listen to their people.

The Best Firms to Work For have a variety of avenues for collecting these thoughts, from all-hands calls and town halls to one-on-one meetings, and for Englewood, Colorado-based TaxOps, the top Best Firm to Work For in the Small Employer Category (those with 15 to 49 employees), a recent email of observations from a new hire summed up the rewarding employee experience at the firm. In addition to noting the favorable employment, HR and benefits policies (which also factor into the Best Firms to Work For ranking), the employee listed several other reasons he chose to come to TaxOps from a national firm, starting with: "No selling your soul to a sweatshop."

## Let's get flexible

That sentiment, in various forms, was echoed by staff of many of the Best Firms to Work For, which are all contending with a talent shortage and changing employee expectations in the wake of the pandemic and a greater reliance on remote work.

When asked what sets them apart from their peers,

flexibility was the most common answer from TaxOps and the other two No. 1 Best Firms to Work For in their size categories: Austin, Texas-based Maxwell Locke & Ritter in the Medium Category (50 to 249 employees) and Birmingham, Alabama-based Warren Averett in the Large Category (250 or more employees).

It was also a competitive advantage for 700-person Top 100 Firm Warren Averett, according to chief operating officer April Harry. "We hired people that left their jobs at other firms for the lack of flexibility," she shared. "We were the beneficiaries of good talent because of the rigid rules of other places, and picked up several people throughout the country."

The similar flexibility offered at TaxOps, a tax-only firm with 22 employees that only hires experienced specialists, helps them compete with larger firms, according to partner Mark Dunning. It has also kept voluntary turnover at an impressive 0% over the last year.

"Our flexible work arrangement, where you work where you are — I think that's huge. Even though we are a smaller firm, we compete with the Big Four. ... We have Big Four experience, Big Four leadership and tax abilities, without the stress," said Dunning, who himself is a 15-year veteran of a Big Four firm. "We're different but have some of the same skills and abilities, but have flexibility."

Maxwell Locke & Ritter, which tops its category for the second consecutive year, and the third time overall, also gives freedom to the firm's 132 staff members.

"We want you to work where is best for you, on what

platform, right now," explained leading partner Kyle Parks. "We've always been very flexible for people to do what's in their best interest, and that started before the chaos of 2020. We've stuck to our guns on that and have been even more flexible in regards to the pandemic. It seems to work — people enjoy it and feel empowered to do what's in their best interest during the day, from a personal and professional standpoint. Production continues to thrive, so we have no complaints in that regard. And clients are taken care of, so it's worked."

## Ask and you shall receive

To drill down into exactly what's working and what's not for its people, Maxwell Locke & Ritter started administering stay interviews for the first time this past year.

"We conducted firmwide stay interviews to hear from people — what they like, what they don't, what we could do better," reported talent acquisition manager Sarah Taylor. "The feedback was really positive. We're a fantastic firm, but we are imperfect — no one is perfect. What sets us apart is we are asking ourselves how to be better and we focus on progress, not perfection."

MLR has seen 8% turnover, and hired more people than ever this past year, according to Taylor, including a third recruitment professional to her talent and culture team who has been "very instrumental putting us in a position where we are, especially in today's environment of finding folks," said Parks. Taylor and Parks are especially proud of increasing diversity in the firm's people from 4.7% to 14.8% since January 2021, supported by the firm's diversity, equity and inclusion program.

Across all three size categories, the 2022 Best Firms to Work For were more likely than their nonranking peers to have established a DEI task force or committee. The Best Firms in the Small and Medium Categories also outpaced nonranking peers in offering diversity training, and in the Large Category, they were even with those peers, with 88% offering ongoing training.

This year's Best Firms to Work For honorees also offer generous paid time off, with several, including TaxOps, giving staff unlimited PTO.

At Warren Averett, employees reaching their 10-year mark are eligible for a one-month sabbatical (with renewed eligibility every subsequent five years). To encourage a complete refresh, the IT department disconnects employees from their work contacts and email so they can fully relax without distractions.

Offering flexibility not only boosts the retention rates of the Best Firms to Work For but helps them recruit top talent amid the Great Resignation. Harry acknowledged that the talent shortage is a professionwide problem.

"There's a trend in more recent college graduates that are not willing to work the hours people put into public accounting 10 to 20 years ago," she said. "They have

**See BEST FIRMS on 10**





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**2022 Best Firms  
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Staff members at Warren Averett, the No. 1 Best Firm to Work For in the Large Category

# Best Firms

From page 8

boundaries around the amount of time they work. We adapt to managing those expectations while also getting the client work done. ... Loyalty is not as common these days, and you see people with more short-term career goals rather than long-term. We adjust to managing that. It is an employees' market at this point and we are trying to adapt to these new expectations. We now have mandatory hours reduced somewhat so they are not going to work as much or be overwhelmed sometimes."

Amid shifting employee priorities, competitive pay remains a timeless advantage, which the Best Firms to Work For recognize and cater to with salary adjustments. This is reflected in the survey results, where across all size categories 89% of Best Firms employees say their pay is fair for the work they perform, compared to 82% of staff at nonranking firms. Warren Averett has remained diligent on this front, according to Harry. "We focus on staying on top of the job market, what the market price is," she said. "We made salary adjustments, which are usually in June, we backed this up to May. They were larger than normal; double-digit salary increases this year."

TaxOps also recently boosted pay. "At the start of summer, due to inflation, we gave a straight 8% increase across the board," said Dunning. "We're pretty proud that that was before any Big Four competitors. ... We were kind of on the leading edge with that."

## Ongoing development

In addition to competitive pay, the best workplaces offer challenging and interesting work, which has been a differentiator at Warren Averett, along with individualized professional development. "We start people really young interacting with clients," reported Harry. "When people

feel they are helping clients, they feel good about where they are working. We are trying our best to develop people, give them good feedback, goals — it's something we do well, personally investing in our people. We've always believed in development; everyone needs development, no matter what level."

Warren Averett's Best Firm to Work For peers would agree — across all size categories, 91% of staff respondents said their firms offer as much initial training as they need (versus 83% reporting the same at nonranking firms) while 94% report sufficient ongoing training (versus 89% at nonranking firms).

While Warren Averett is eager to connect staff to clients, the firm also recognizes it's not just the number of clients but the caliber, with Harry noting that firing bad clients is key to employee morale. "We are really focused on great clients; people want to work on great clients," she said. "Initially, we are really focused on identifying A-plus-level clients and if we have smaller clients that are not profitable, not always good to staff, those clients are not good for the firm, and we help them find a new firm. When staff find you are willing to do that for them, it really goes a long way."

The firm also created a goal-focused development tool for its partner group a few years ago that has been so successful they are rolling it out to the rest of the firm. "It builds consistency," Harry shared. "People have two coaches working on their goals and career path."

Since TaxOps only hires experienced professionals, there is less of a lift on the coaching side, said director of communications Kristine Newkirk: "A part of TaxOps is, clients aren't paying to train people; our people are fully trained and experienced. ... They are very focused and can take time to be efficient, focusing on efficiency over hours spent on the job."

This is also reflected in the firm's fixed-fee pricing model. "It's never about the charged hour; no one likes

doing timesheets," said Dunning. "Clients even like that more. ... And we are focused on doing the right job, doing the work and getting it done."

## Keeping in touch

At MLR, senior staff meet with employees to not only offer career guidance but to encourage camaraderie in an environment where only 35-40% of staff are in the office on a daily (and voluntary) basis.

"For our remote folks, people are reaching out to have touchpoints periodically," explained Parks. "Every one of our partners is assigned someone on staff every month, and every person in the firm is touched by a partner at least once a month, about everything from, 'How are you doing; how is your family; what can we do to help you?'"

Preserving the firm's culture can prove difficult in today's hybrid work environment, acknowledged talent acquisition manager Taylor: "The greatest challenge is adjusting to the new landscape of the workforce. Everyone in the industry has had to shift to remote for the time being. We are hybrid, and a lot of thought and effort is put into maintaining the employee experience."

MLR has done this with a range of virtual events, from trivia nights to culture chats to variety hours. When it recently hosted an in-office movie screening, those attending virtually were sent popcorn and candy in the mail. Warren Averett also hosts virtual and in-person gatherings, and on the occasion of its 50th anniversary this year, launched a "50 Acts of Service" program of multiple community service projects that Harry said the staff have appreciated as a way to reconnect with colleagues and the community.

While leaders at the Best Firms to Work For have had to get more creative in bringing their people together in these unpredictable times, they must also rely on that ever-popular F-word — learning to be just as flexible as the work arrangements they now accommodate.

"It's really about being able to be flexible and pivot," shared Harry. "Meaning that you are listening to [employees'] voices and quickly reacting to what they are requesting. ... When people feel like you're listening, it means a lot. Since the pandemic began, one thing we've done really well is that we are ready to adapt to any situation thrown at us."

In addition to adaptability, what sets the 2022 Best Firms to Work For apart is their motivation to do well by their people. "I've worked at a lot of places and seen a lot of great perks and benefits," said Taylor. "But being privy to the leadership conversations, the biggest differentiator in talking about something we want to do for our people — benefits, policies, programs — it's always because it's the right thing to do and not because there is an ulterior motive — [like] it will help with recruitment or retention. We work for really great, genuine people who want what's best for the team and the individuals." **AT**



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- **Sweeney Conrad, P.S.** (Kirkland, WA)
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Small Employer Category (15-49 U.S. employees)				% vol.	PTO or vacation	Paid	—% of staff working remotely—			Chief executive
Rk.	Firm	Location	Staff	turnover	/sick days*	holidays	Pre-COVID	In 2020	Currently	
1	TaxOps	Englewood, Colo.	22	0	U	7	100	100	100	Mark Dunning
2	Realize CPA	San Francisco	42	14	20	10	10	100	100	Tracy Hom
3	HD Davis CPAs	Youngstown, Ohio	41	2	19	8	65	100	75	Tim Petrey
4	WBL CPAs + Advisors	Atlanta	41	19	20	10	25	100	100	Bruce Benator
5	CD Bradshaw & Associates	Georgetown, Texas	18	25	27	9	0	99	39	Carrie Bradshaw
6	GMS Surgent CPAs	Devon, Pa.	26	11	17	10	0	100	50	Brian Gallagher
7	MNMW & Co. <sup>1</sup>	Fort Myers, Fla.	47	75	16	9	13	25	25	Karen Mosteller
8	Blackman & Sloop CPAs	Chapel Hill, N.C.	36	10	16	12	0	75	75	Andrea Eason
9	Ennis, Pellum & Associates CPAs	Jacksonville, Fla.	36	27	15	9	3	97	97	Ron Pellum
10	WhippleWood CPAs	Littleton, Colo.	29	0	16	8	75	95	95	Richard Whipple
11	Fischer Cunnane & Associates	West Chester, Pa.	33	25	16	9	7	53	50	Richard Stiebritz
12	Navolio & Tallman	Walnut Creek, Calif.	39	10	21	12	26	100	100	John Navolio
13	BrooksWatson & Co.	Houston	15	6	20	8	100	100	100	Michael Brooks
14	Davidson Fox & Co.	Binghamton, N.Y.	27	3	5	11	10	83	83	Mark Wasser
15	Fair, Anderson & Langerman	Las Vegas	34	12	30	15	0	80	40	Kyle Bybee
16	Gish Seiden	Woodland Hills, Calif.	38	2	16	8	0	88	86	Maureen O’Gara-Adford
17	Bland Garvey CPAs	Richardson, Texas	36	8	12	7	5	68	81	John Garvey
18	Bormel, Grice & Huyett	Laurel, Md.	29	3	15	8	10	80	50	Larry Bormel
19	Dark Horse CPA	Las Vegas	40	0	U	12	75	100	100	Chase Birky
20	Wymer Brownlee Wealth Strategies	Oklahoma City	46	2	9	9	0	50	0	Kyle Brownlee
21	Levitzacks CPAs	San Diego	44	9	15	14	0	76	98	Victor Ramsauer
22	Faw Casson	Dover, Del.	44	6	19	9	2	100	40	Brian Stetina
23	KRS CPAs	Paramus, N.J.	23	8	U	8	20	100	60	Maria Rollins
24	Shannon & Associates	Kent, Wash.	32	10	20	8	20	90	50	Julie Courtney
25	Magnuson, McHugh & Co.	Coeur d’Alene, Idaho	27	0	36	9	20	90	35	Michelle Haneline
26	PAAST	Coral Gables Fla.	42	20	10	7	0	80	20	Carlos Perez-Abreu
27	Duckett Ladd Dental CPAs	Springfield, Mo.	18	9	0	9	10	80	50	Bill Ladd
28	Rudler	Ft. Wright, Ky.	47	6	20	9	24	78	68	Alex Weidner
29	Cohesion Companies	Dallas	15	0	U	8	0	50	50	John Mark Prewitt
30	Metz & Associates	Phoenix	32	7	U	5	50	55	55	Travis Jack
31	Hawaii Accounting	Honolulu	20	10	10	12	15	90	25	Matthew Delaney
32	Dillwood Burkel & Millar	Santa Rosa, Calif.	23	8	16	9	25	100	65	David Dillwood
33	Market Street Partners	Chattanooga, Tenn.	32	22	U	10	5	20	20	Kyle Bryant
34	RP&B CPAs	R. Cucamonga, Calif.	27	14	14	7	30	93	93	Michael Kouyoumdjian
35	Swindell Bohn Durden & Phillips	Jacksonville Bch., Fla.	29	0	15	11	5	100	75	Stephen Phillips
36	Whisman Giordano & Associates	Newark, Del.	29	23	20	8	5	80	35	Joseph Giordano
37	Badger CPA	San Antonio	28	18	15	9	100	100	100	Shannon Badger
38	De La Hoz, Perez & Barbeito	Miami	29	2	15	9	25	100	75	Jorge De La Hoz
39	O&S CPAs	Long Beach, Calif.	30	50	10	9	3	55	20	Paul Scholz
40	Edwards & Associates	Dallas	24	0	15	7	17	100	100	Robert Edwards

U = Offers unlimited PTO | \* Either PTO days or combined vacation and sick days available after one year of employment 1 Markham Norton Mosteller Wright & Co.

Medium Employer Category (50-249 U.S. employees)				% vol.	PTO or vacation	Paid	—% of staff working remotely—			Chief executive
Rk.	Firm	Location	Staff	turnover	/sick days*	holidays	Pre-COVID	In 2020	Currently	
1	Maxwell Locke & Ritter	Austin, Texas	132	8	21	10	15	95	85	Kyle Parks
2	Brown Schultz Sheridan & Fritz	Camp Hill, Pa.	131	12	35	9	2	95	55	Kenneth Wolfe
3	Windham Brannon	Atlanta	180	15	20	11	10	95	90	Heidi LaMarca
4	E. Cohen and Co. CPAs	Rockville, Md.	93	11	17	11	10	95	75	Eric Cohen
5	Global Tax Management	Wayne, Pa.	175	9	23	9	1	100	100	David Sekula
6	BeachFleischman	Tucson, Ariz.	125	19	16	8	6	14	14	Eric Majchrzak
7	WilkinGuttenplan	East Brunswick, N.J.	127	9	U	10	99	100	99	Edward Guttenplan
8	Johanson & Yau	Campbell, Calif.	66	3	U	13	11	91	91	Dave Davis
9	Tonneson + Co.	Wakefield, Mass.	82	10	22	11	25	90	80	Richard Mastrocola
10	Snyder Cohn	North Bethesda, Md.	70	16	27	9	10	62	57	Steven Braunstein



A person with a backpack is climbing a steep, layered rock face. The scene is set against a warm, orange-hued sky at sunset or sunrise. The person is positioned on the right side of the frame, reaching up towards the top of the rock. The rock has distinct horizontal layers and some small plants growing in the crevices. The overall mood is one of achievement and challenge.

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Medium Employer Category (cont'd)										
Rk.	Firm	Location	Staff	% vol. turnover	PTO or vacation /sick days*	Paid holidays	—% of staff working remotely—			Chief executive
							Pre-COVID	In 2020	Currently	
11	Rushton	Gainesville, Fla.	51	14	15	8	0	53	26	J. Chris Hollifield
12	Saltmarsh, Cleaveland & Gund	Tampa, Fla.	153	29	23	10	30	65	65	Lee Bell
13	Mowery & Schoenfeld	Lincolnshire, Ill.	92	5	U	10	5	85	55	Jeffery Mowery
14	Insero & Co. CPAs	Rochester, N.Y.	129	11	23	12	20	100	80	Nancy Catarisano
15	Swindoll, Janzen, Hawk & Loyd	McPherson, Kan.	72	11	15	10	7	90	27	Chet Buchman
16	Global Tax Network	Maple Grove, Minn.	76	16	25	12	40	99	95	David Kolb
17	Beaird Harris	Dallas	60	15	15	13	5	89	89	Paula Allgood
18	BMSS	Birmingham, Ala.	239	9	20	9	10	75	50	Don Murphy
19	Bartlett, Pringle & Wolf	Santa Barbara, Calif.	72	2	16	9	20	80	16	Eileen Sheridan
20	McCarthy & Co.	Blue Bell, Pa.	50	0	20	9	1	100	1	Martin McCarthy
21	Gallagher, Flynn & Co.	Lebanon, N.H.	83	11	25	11	5	100	80	Phil Lapp
22	Anglin Reichmann Armstrong	Huntsville, Ala.	82	15	U	9	5	50	5	Gary Anglin
23	Kruze Consulting	San Francisco	73	12	39	10	100	100	100	Vanessa Kruze
24	Smith Leonard	High Point, N.C.	75	10	19	10	20	75	50	Mark Bulmer
25	Maner Costerisan	Lansing, Mich.	144	16	20	8	5	95	75	Edward Williams
26	ATKG	San Antonio	61	5	U	9	90	90	90	Eric Abati
27	Hannis T. Bourgeois	Baton Rouge, La.	127	18	18	9	24	100	75	Jay Montalbano
28	Hancock Askew & Co.	Savannah, Ga.	218	13	21	11	10	100	70	Michael McCarthy
29	Walter & Shuffain	Boston	75	18	16	10	10	100	85	Jonathan Yorks
30	Mahoney, Ulbrich, Christiansen, Russ	St. Paul, Minn.	69	13	15	9	5	75	75	Roz Allyson
31	Martin Starnes & Associates	Hickory, N.C.	65	11	16	8	5	50	5	Victoria Martin
32	James Moore & Co.	DeLand, Fla.	237	9	U	8	7	90	70	Suzanne Forbes
33	Pivot CPAs	P. Vedra Beach, Calif.	50	8	20	9	0	0	2	Peter Reynolds
34	KWC CPAs	Alexandria, Va.	102	4	16	12	10	85	50	Connie Hammell
35	Kassouf & Co.	Birmingham, Ala.	86	12	16	8	5	100	23	Gerard Kassouf
36	Sansiveri, Kimball & Co.	Providence, R.I.	51	9	28	11	10	92	90	Jason Daponte
37	Bernard Robinson & Co.	Greensboro, N.C.	167	9	21	9	5	95	85	Alisa Moody
38	Bowman & Co.	Stockton, Calif.	74	2	15	9	7	75	12	Dan Phelps
39	Wilkins Miller	Mobile, Ala.	74	9	20	10	3	56	17	W. Allen Carroll
40	KPM CPAs	Springfield, Mo.	82	8	20	8	0	7	15	Sean Balisle
41	GEMRT & Co. <sup>2</sup>	Coral Gables, Fla.	61	45	15	10	5	80	80	Roy Garcia
42	Windes	Long Beach, Calif.	195	11	15	11	5	40	40	Jim Cordova
43	McKonly & Asbury	Camp Hill, Pa.	88	5	23	10	50	90	80	Michael Hoffner
44	EEPB	Houston	92	16	16	9	0	85	1	Doug Louk
45	Grimbleby Coleman CPAs	Modesto, Calif.	79	5	19	11	1	88	61	Ian Grimbleby
46	KraftCPAs	Nashville, Tenn.	221	11	22	11	5	50	40	Vic Alexander
47	Coulter & Justus	Knoxville, Tenn.	58	7	22	7	5	75	25	Mike Parton
48	Varney & Associates CPAs	Manhattan, Kan.	56	15	18	8	20	50	43	Michelle Crow
49	Sweeney Conrad	Kirkland, Wash.	104	NA	25	11	5	95	25	Sam North
50	Matthews, Carter and Boyce	Fairfax, Va.	74	11	22	10	6	88	85	Jude Covas
51	KRD	Schaumburg, Ill.	92	11	U	10	5	90	80	Jon Segal
52	Opsahl Dawson	Vancouver, Wash.	63	10	20	12	20	60	45	Aaron Dawson

U = Offers unlimited PTO | \* Either PTO days or combined vacation and sick days available after one year of employment

2 Garcia Espinosa Miyares Rodriguez Trueba & Co.

Large Employer Category (250+ U.S. employees)										
Rk.	Firm	Location	Staff	% vol. turnover	PTO or vacation /sick days*	Paid holidays	—% of staff working remotely—			Chief executive
							Pre-COVID	In 2020	Currently	
1	Warren Averett	Birmingham, Ala.	700	19	15	10	80	96	96	Mary Elliott
2	Schellman	Tampa, Fla.	402	16	15	6	75	100	90	Avani Desai
3	Kearney & Co.	Alexandria, Va.	776	13	20	11	10	100	95	Ed Kearney
4	Bennett Thrasher	Atlanta	380	15	20	11	1	80	80	Jeffrey Eischeid
5	Wolf & Co.	Boston	298	19	23	11	40	95	95	Mark O'Connell
6	Anchin	New York City	379	13	20	12	4	95	95	Russell Shinsky
7	Wiss & Co.	Florham Park, N.J.	276	15	U	12	10	95	75	Paul Peterson
8	Mauldin & Jenkins	Atlanta	377	8	U	9	10	95	95	Hanson Borders

U = Offers unlimited PTO | \* Either PTO days or combined vacation and sick days available after one year of employment