



## CAPSTONE MARKETING

### Testimonials

"Insightful. Involved. Invaluable. It's the tagline that we developed for our firm with the guidance of Jean Caragher and her Capstone Marketing team and I must say...we are all "in" when it comes to working with Capstone. These three adjectives also succinctly describe our experience and relationship with Jean.

- **INSIGHTFUL.** Not only is Jean extremely knowledgeable about the CPA profession, she took the time to get to know us...what makes our firm tick...the value we provide to our clients and future clients.
- **INVOLVED.** Jean was masterful in making sure that our rebranding project stayed targeted, timely and on budget.
- **INVALUABLE.** Several years later our logo, "all in" brand, and marketing collateral pieces are just as fresh as the day we launched. It's positively impacted our business as well as our firm's culture."

*Ursula Scroggs, CPA  
Managing Partner  
DKSS*

"Jean Caragher was instrumental in building a marketing foundation for Hantzmon Wiebel. From marketing plans to branding to training she helped get everybody on board with our marketing program. I am grateful for her help in hiring our marketing director and consider her a true friend and confidant."

*Jennifer Lehman, CPA, CGMA  
CEO  
Hantzmon Wiebel LLP*

"When we began working with Jean our focus was on client retention, not new business development. She set up and manages our enewsletter program and social media. I consistently receive positive comments and thanks from clients and contacts about *SKP Perspectives*. In the last couple of months, we obtained 4-5 new business clients – an added bonus! Thank you, Jean, for helping us communicate more effectively and frequently."

*Richard Pavano, CPA  
Managing Partner  
Smith Klein & Pavano*

"My firm hired Capstone Marketing and Jean Caragher to perform "Brand Surgery". We had recently acquired a new partner and could not see adding yet another name to an already long and complicated, difficult to pronounce name that just was not user friendly. Capstone was one of three firms we vetted and was the most responsive and detailed in their proposal, hitting on the nose the deliverables that resonated with us. Their research was tremendous and their process very flexible but organized. At the end, we have a name we love and an identity that reflects who we are. Thank you, Jean!

*Michael Velazquez, CPA/PFS, CFP®, CGMA, MSP  
Senior Partner  
The Accountancy*

"Over her years serving as Frazer, LLP's marketing consultant Jean was instrumental in helping the firm develop an improved and more robust framework for our overall marketing program, including niche marketing plans, a rewards and recognition program, and various training. She also helped us to greatly enhance our website, introduced us to inbound marketing and blogging, and grew our social media presence. We thank Jean for her keen insights on CPA firm marketing, her professionalism, and helping us build our marketing foundation and wish her the best in the future."

*Stephen Bastardi, CPA  
Partner  
Frazer, LLP*

"After working with you for a little less than two years, our firm's commitment to marketing and appreciation for its value is remarkably stronger. Your structured process of assessment and the development of a written marketing plan provided clarity and accountability. Your quarterly visits including plan review and reports of activities since your last visit were very effective. Your training programs with all of our professional service personnel reinforced the message we were delivering in our communications of an effort to upgrade our marketing culture. We have upped our game in a big way and you were the catalyst."

*Scott L. Williams, CPA  
Partner  
Gilliam Bell & Moser, L.L.P.*

"Jean is professional, enthusiastic, and energetic and will definitely push you out of your comfortable zone, which is something that most of us in the profession need from time to time. Much of our firm's success over the last few years can be attributed to our relationship with Jean Caragher. We believe that Jean is a valuable resource that truly understands the marketing needs of accounting firms. It has been our privilege to work with her."

*William A. Young, Jr., CPA  
Managing Partner, Mitchell Wiggins  
Now, Partner, Mitchell Wiggins*

"I would highly recommend Jean for her marketing expertise. She understood our industry better than any consultant we have ever worked with. Jean is extremely well organized and managed our variety of personalities with professionalism. She was instrumental taking our marketing efforts to a higher level."

*Todd Landry, CPA  
Partner, Eadie + Payne LLP  
Now, Principal, Powell, Spafford & Landry Inc.*

"When we decided to undertake the challenge of rebranding our firm for its 90th anniversary year I had no hesitation engaging the services of Jean Caragher and her firm Capstone Marketing to lead us through this initiative. From top to bottom she and her team guided us through the process, bringing their knowledge, skills and positive energy to each step along the way. Our rebranding was a huge success and has been well received by both clients and staff."

*S. Vincent Crescenzi, CPA, CVA, CFE  
President/Managing Partner, CBM  
Now, Retired*

"As managing shareholder of our firm, I am very involved in the marketing function within our firm. We worked with Jean Caragher of Capstone Marketing for over three years and she has had a profound impact on the marketing function and effectiveness at our firm. With Jean's assistance, we have successfully established a number of thriving niches, have implemented a progressive marketing tracking and rewards program and established our firm as one of the premier service providers in our market. Prior to Jean joining our team as a consultant, marketing was an afterthought. Now, marketing is an integral part of our culture."

*Martin Einhorn, CPA/ABV, CVA  
Managing Shareholder, Wall, Einhorn & Chernitzer, P.C.  
Now, Retired*

"Thank you for the wonderful job of creating the BatesCarter brand! *Exceeding Expectations. Always.* really captures who we are and who we strive to be every day. The brand and the collateral materials serve as the foundation for all of our marketing efforts."

*J. Ronald Bracewell, Jr. CPA/ABV  
Managing Partner  
BatesCarter*

"Jean facilitated our two-day firm retreat for Partners, Principals and Managers. She was great at connecting with our multi-generational group and helping us achieve our retreat objectives. We found Jean to be experienced, professional and well in tune with the culture of CPA firms."

*Charles Postal, CPA  
Managing Partner, Santos Postal & Company  
Now, Partner, PBMares, LLP*

"Thank you for the presentation for our Member group. You caused us to realize how similar our objectives are for the firm and a consensus that we had to take certain actions to develop and implement a marketing and sales program. I thank you for getting us united in this initiative. We agreed on a job description today and are moving forward to recruit a Marketing Director and will continue with the steps and actions you identified and recommend."

*Arthur Bell  
Managing Member, Arthur F. Bell, Jr. & Associates, L.L.C.  
Now, Retired*

"Jean worked with our Firm to provide marketing training to several different levels of audit and tax professionals. Some of the information was basic and some more advanced, but Jean did a great job of weaving together the program so everyone got something out of it. For the more advanced marketers, she kept their interest by having them assist with the training and sharing their own success stories with the rest of the group. Jean is always fun and entertaining, but in addition and most importantly, Jean has immediate credibility with the group as a result of her extensive experience in accounting marketing."

*Julie Tucek  
Marketing Director  
Legacy Professionals LLP*

"When we called you last October our marketing program lacked focus and our website was woefully out of date. Thanks to your efforts Jameson & Company now has a brand; our website tells our story, conveys our expertise, and offers our clients and prospects items of value; and, I have a better idea about how to continue to grow our firm. I also appreciate your candid thoughts and advice. It has been a pleasure working with you."

*Edward G. Jameson, CPA  
Managing Partner  
Jameson & Company*

"I met Jean at a conference and thought if she can market us as well as she markets herself then we have a winner. She has exceeded my expectation in every way. Jean was a key part of a team that helped Wall, Einhorn and Chernitzer move from being a good firm to a great firm. Jean takes a holistic approach to marketing, helping to make it a part of the firm culture from the partners right down to the staff. She works closely and effectively with all members of the firm ensuring firm buy-in and individual accountability. Over the years of working with us she focused on doing the right things, not the easy things. She never hesitated to step up to the plate and make things happen. When we left a meeting with action items, Jean not only followed through on her list but she made sure everyone else followed through on his or hers as well. We finally grew to the point where we needed to hire a full-time marketing professional and Jean did an outstanding job of finding and interviewing qualified candidates. We are extremely happy with our new marketing coordinator and we couldn't have done it without Jean. If she weren't so good, we'd probably still need her."

*Paul G. Di Nardo, C.P.A.  
Shareholder  
Wall, Einhorn & Chernitzer, P.C.*

"Our firm has grown from 11 people to 70 and the period of most rapid growth occurred during Jean's participation as our Marketing Consultant. We have grown from servicing one public company to twelve and have national recognition in several of our niches. Jean brings enthusiasm and expertise, each of which has impacted our shareholders and staff. Over the last two years our firm has been listed as one of the Top 25 CPA firms in the country and Jean has been an integral part of the process that enabled us to achieve the goals we set forth in our planning process."

*Mark Murovitz, CPA  
Managing Shareholder, Tauber & Balser, P.C.  
Now, Retired*

"Jean Caragher has been our firm's marketing consultant for nearly five years. In that time, we have established a marketing culture that permeates our firm. We created a new brand, developed niche markets, provided marketing training for all levels, and implemented a rewards and recognition program. This would not have been possible without Jean's knowledge, experience and sense of humor. We consider Jean an integral part of the T&B team."

*Leslie Balmforth, CPA  
Principal, Chief Operating Officer, Tauber & Balser, P.C.  
Now, Partner, Apris*

"Our timing with Capstone could not have been better. We had determined a critical component of our partnership's success would be sustained profitable growth. Jean's contributions ranged from organizing our initial focus, challenging our thinking and helping us remain accountable. Her style fit

comfortably within our firm's culture. In the end, she provided so much initiative and value that she worked herself out of a job by assisting us in finding the perfect marketing director. Count us among the many satisfied clients."

*Phil Moore, CPA  
Managing Partner, Porter Keadle Moore, LLP  
Now, Southeast US Market Leader, Wipfli LLP*

"I first met Jean in 1986 when she was the marketing director at Israeloff, Trattner & Co. Accounting marketing was a burgeoning industry and she was at the forefront. Over the years, I've watched her become a leader – sharing her knowledge, gaining the respect of her clients and colleagues, and helping CPAs create and implement focused, effective marketing programs. Congratulations, Jean! I wish you many more years of success with Capstone Marketing."

*Allan D. Koltin  
President & CEO, PDI Global, Inc.  
Now, CEO, Koltin Consulting Group, Inc.*

"As usual, you did an outstanding job facilitating the marketing strategy session for our Manufacturing Industry Group. The research you gathered prior to the session and your ability to keep us focused were extremely valuable. I now have the excitement and direction at the team level to get some big things accomplished."

*Ronald W. Benoit, CPA  
Partner  
Moss Adams LLP*

"Jean Caragher is one of the thought leaders in the field of marketing. She takes a 10,000-foot view of the situation within a firm to develop strategies for marketing, management, and leadership. Having run successful marketing departments for several CPA firms in large markets, and an accounting association, Jean is ideally equipped to consult on the tough issues facing firms today. And, she is a helluva karaoke singer."

*Neil Fauerbach, MBA  
Partner - Director of Business Development & Marketing, Smith & Gesteland, LLP  
2007-08 President, Association for Accounting Marketing  
Now, Retired*

"Jean Caragher is a talented professional. She is unyielding in her pursuit of the perfect campaign, tenacious in her determination to give her clients the best strategy for success and meticulous in planning, implementation and follow through. Through every phase of her work she never loses her perspective or her integrity and most especially her sense of humor. I have known Jean for almost 20 years. She is a pioneer in the accounting marketing profession and understands the value of a structured, well thought out marketing program. As a result of this understanding, her work has a measurable impact on a firm's growth and profitability for years after she's out the door."

*Carol Schrager  
Director of Marketing, Friedman LLP  
Now, Retired*

"I have known Jean Caragher since I became involved with the Association for Accounting Marketing and I am always amazed at her depth of knowledge! More importantly, though, I appreciate her willingness to share all that she has learned. She is one of those founders who have never abandoned those who came after her. As a professional, as a friend and as a colleague in the world of accounting marketing, Jean has definitely had a strong positive impact on us all."

*Sally Glick  
Principal, Chief Marketing Officer  
Sobel & Co., LLC*

"I want to thank you for the fine job you did helping us maintain our marketing efforts ... A number of our partners commented to me that they appreciated having someone with your industry knowledge and background work with them to develop their marketing plans. That outside, "big picture" view along with your structured approach to planning resulted in a more focused approach to our marketing activities ... My partners and I enjoyed working with you and would definitely recommend you to any firm looking for assistance with their marketing program."

*Jonathan Miller, CPA  
Managing Partner, Habif, Arogeti & Wynne, LLP  
Now, Partner, Habif, Arogeti & Wynne, LLP*

"Thank you for your effort ... to assist our firm in creating a marketing culture. You have helped us focus our marketing program and educated the entire firm about how they can play a role in promoting CFDL, cross-selling services, and obtaining new business. You have opened our eyes to the opportunities that a proactive marketing program can bring."

*Howard P. Dorman, CPA  
Managing Partner, Cohen, Friedman, Dorman, Leen & Co.  
Now, Partner, WeiserMazars LLP*

"I found Jean to be friendly, articulate, and very professional in her approach. She was quick to grasp the situation and to formulate a plan of action. Her written job descriptions for the marketing director and coordinator positions were right on target and greatly facilitated our task of interviewing the candidates. I am convinced she saved us countless hours and dollars in our search. I would, without reservation, recommend Jean as a person of high capability with outstanding organizational skills. It was a pleasure to work with her."

*Wendell Jones, CPA  
Partner, Henry & Horne, LLP  
Now, Partner "Emeritus", Henry & Horne, LLP*