



2014 Five Star Certified Public Accountant



2014 winner Daniel J. Hellmann, CPA, Managing Partner

Daniel J. Hellmann

- Full range of accounting, tax, wealth management (CSD Financial), business advisory, IT, marketing and recruiting
- Industries: construction, real estate development, health care, manufacturing, retail, nonprofit and public sectors
- Office based in the South Hills of Pittsburgh with a second office in Wexford

*Where Innovation Meets Black and White
in Perfect Harmony*

Dan has been with Case | Sabatini for more than 25 years. As managing partner, he oversees all aspects of our growing firm. Dan personally serves many of our firm's clients, and specializes in construction and real estate development projects. He received a B.S degree in accounting from Robert Morris College. He is an active member of the AICPA, the PICPA and many industry associations.



Left to right: 2014 winner Daniel J. Hellmann, CPA, Managing Partner; Debra S. Pitschman, CPA; Mark A. Ulishney, CPA; Edward S. Gardner, CPA and three-year winner Five Star Wealth Manager Gilbert E. Davis, Jr., CPA, PFS



CASE | SABATINI

470 Streets Run Road • Pittsburgh, PA 15236
Phone: 412-881-4411 • Fax: 412-881-4421
Hellmann@CaseSabatini.com • www.CaseSabatini.com

As seen in *Pittsburgh Magazine*



2014 Pittsburgh Five Star Certified Public Accountants

How do you find an accounting professional with experience, who has a good base of clients with high retention rates, and who has undergone a regulatory and complaint review? And when you find them, are they accepting new clients?

Pittsburgh Magazine and Five Star Professional partnered to find accounting professionals who satisfy 10 objective eligibility and evaluation criteria. Among many distinguishing attributes, the average one-year client retention rate for this year's award-winning certified public accountants is more than 97 percent.

A Select Award

The 2014 Five Star Certified Public Accountants are a select group, representing less than 1 percent of the certified public accountants in the Pittsburgh area.

Although this list is a useful tool for anyone looking for help with accounting, it should not be considered exhaustive. Undoubtedly, there are many excellent accounting who, for one reason or another, are not on this year's list. Self-nominations for this award are not accepted. Pittsburgh award candidates were identified using internal and external research data.

Determination OF AWARD WINNERS

Award candidates who satisfied the following objective eligibility and evaluation criteria were named 2014 Five Star Certified Public Accountants.

Certified Public Accountants

Eligibility Criteria - Required

1. Credentialed Certified Public Accountant (CPA).
2. Actively employed as a credentialed professional in the accounting services industry for a minimum of five years.
3. Favorable regulatory and complaint history review.
4. Accepting new clients.
5. Spend more than 50 percent of their time on taxation or other accounting services.

Evaluation Criteria - Considered

6. One-year client retention rate.
7. Five-year client retention rate.
8. Number of clients served.
9. One-year billing realization rate.
10. Education and professional designations/certifications.

Regulatory Review: As defined by Five Star Professional, the accounting professional has not:

- Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine.
- Had more than a total of three customer complaints filed against them (settled or pending) with any regulatory authority or Five Star Professional's consumer complaint process.
- Individually contributed to a financial settlement of a customer complaint filed with a regulatory authority.
- Filed for personal bankruptcy.
- Been convicted of a felony.

Five Star Professional conducts a regulatory review of each candidate. Five Star Professional also uses multiple supporting processes to help ensure that a favorable regulatory and complaint history exists.

- Each candidate who passes the Five Star Professional regulatory review must attest that they meet the definition of favorable regulatory history, based upon the criteria listed above.
- Five Star Professional promotes via local advertising the opportunity for consumers to confidentially submit complaints regarding a potential winner.
- Five Star Professional contacted approximately 1 in 12 households identified as having a high propensity to use taxation services in order to provide consumers the opportunity to submit complaints regarding a potential winner.

Research Disclosures:

- Accounting professionals do not pay a fee to be considered or placed on the final list of Five Star Certified Public Accountants. Once awarded, accounting professionals may opt to purchase additional profile ad space or related award promotional products.
- The Five Star award is not indicative of an accounting professional's future performance.
- The inclusion of an accounting professional on the Certified Public Accountants list should not be construed as an endorsement of the professional by Five Star Professional or *Pittsburgh Magazine*.
- Five Star Professional is not an advisory firm, and the content of this article should not be considered financial advice. For more information on the Five Star award, go to www.fivestarprofessional.com.
- 931 award candidates in the Pittsburgh area were considered for the Five Star Certified Public Accountant award. 13 (approximately 1 percent of the award candidates) were named 2014 Five Star Certified Public Accountants.
- The award methodology does not evaluate the quality of services provided.