

2023 EXEMPT ORGANIZATIONS CONFERENCE

Lumsden McCormick
LLP
CERTIFIED PUBLIC ACCOUNTANTS

SPEAKER BIOGRAPHIES



Amy Duffin
*Assurance Technical
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Amy brings more than 15 years of professional audit experience. Before joining the Professional Practice Group within BDO in 2023, she managed audits of nonprofit organizations and qualified settlement trusts. Her experience includes auditing organizations under US GAAP, group reporting, international operations, ERISA and the DOL for employee benefit plans, and under the OMB Circular A-133/Uniform Guidance. Amy's areas of expertise include governmental cost principles, revenue recognition, internal control policy and procedure analysis, net asset testing and disclosure, alternative investment testing and disclosure, indirect rate structures, compliance audits of nonprofits, interfacing regularly with audit committees and management and providing technical support on auditing and accounting matters. In addition, Amy served as an Audit Quality Director where she assisted engagement teams with GAAS and US GAAP technical accounting matters and develops and facilitated local office and external trainings.



Fred Floss, Ph.D.
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Fred Floss is the chairperson of the Department of Economics and Finance and Professor of Economics and Finance at Buffalo State College where he teaches courses in both economics and finance including microeconomic theory, econometrics, public finance, investment and portfolio management, and forecasting. He is currently a member of the Buffalo Fiscal Stability Authority and the past Chairperson and current board member of the SUMMIT Board of Directors (a school for autistic and developmentally challenged students).

Floss previously served as the Statewide President and Vice President of Academics for United University Professions. While at UUP he served as their chief negotiator for the 2007-2011 contract, which represented 36,000 academic and professional faculty in the SUNY system. He is also a senior fellow at the Fiscal Policy Institute where he was their third Executive Director. Floss has published numerous articles in economics and finance including higher education finance, gender inequity and forensic economics.



Elizabeth Krause, CPA
*Principal
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As a member of the audit department, Liz is responsible for conducting and supervising audit fieldwork. She has expertise working with nonprofit organizations, human service agencies, health care institutions, and governmental entities in the areas of audits, Single Audit, reimbursement, tax and information returns, and financial reporting. Prior to joining Lumsden McCormick in 2013, Liz worked at such places as for the City of Buffalo in the Department of Audit and Control.

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Dan Montante
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Daniel Montante is president and co-founder of Montante Solar. A veteran of the renewable energy industry, Daniel has overseen the company's rapid growth, solidifying its position as a key player in the New York solar market. He is responsible for overseeing company operations, strategic direction, and client satisfaction and retention. His strong managerial and financial modeling skills have played a large role in the company's success. Daniel is involved in the community serving as president of the New York Solar Energy Industries Association; Superintendent's Advisory Committee on Occupational Education Chair for the Buffalo Public School District; and Board Member with Artpark & Company, Inc. and the Arts Service Initiative of Western New York. He earned an M.B.A. at Wake Forest University and a B.S. from Skidmore College.



Megan Morris-Smith, CPA
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Megan is a member of the tax team working with both businesses and individuals. Her focus is on commercial clients, including S Corporations, C Corporations, and partnerships. She also works on consolidated companies, manufacturers, real estate, and service-type companies. In addition, Megan works on Research and Development tax credits and incentives for start-ups and commercial businesses.



Michael Olfano
Chief Executive Officer
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Mike Olfano is the CEO of PCA Technology Group. He leads the overall management and direction of the company by bringing senior-level experience in both the financial and operational areas. He has diverse industry expertise working in electronics, industrial manufacturing, IT, HR, outsourcing, and education. He is passionate about guiding companies to success by developing a vision and helping to translate that vision into reality. In his free time, he enjoys spending time with his wife and three children. He also loves playing guitar and donating time to assist in the classroom at the University of Buffalo School of Management.

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Naria K. Santa Lucia
*General Manager -
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Naria currently serves as General Manager for Digital Inclusion and Community Engagement at Microsoft Philanthropies. Naria oversees Microsoft's global philanthropic strategy, grant investments and partnerships in digital skills, computer science education, and career pathways. With the goal of increasing digital, computing, and AI skills for traditionally underrepresented and under-resourced communities, Naria works in partnership with nonprofit organizations around the world to help millions of people thrive in the digital economy.

Naria is a graduate of the Law School and the College at the University of Chicago. She is currently the Chair of the World Bank's Solutions for Youth Employment and also serves on the Board of Directors of Columbia Legal Services.



Jeremy Smith, CPA
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Jeremy's responsibilities include managing fieldwork, guiding staffing, coordinating efforts with management, risk analysis, and detail review of our procedures. He has over ten years of experience working with school districts and governmental entities by providing both internal and external auditing services. Jeremy will serve as our key client liaison and manage fieldwork, client expectations, and preparation and review of our deliverables. In addition, he will assist with overall management of the audit engagement and will provide direct supervision of the audit fieldwork team and review of the audit documentation. Jeremy maintains the continuing professional education requirements of Government Auditing Standards.



Sarah Tanbakuchi
President & CEO
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An advocate for the Western New York region, Sarah joined TechBuffalo to continue spearheading efforts to elevate and promote homegrown tech talent in WNY and raise Buffalo-Niagara's profile as a top destination for tech. Sarah has led large-scale operations in banking, including the launch of the M&T Tech Academy, served as an attorney, and is an active member of the community serving as a board member of several organizations.