

## Awards Selected by the Chapter Coordinating Committee

### **Chapter Awards**

The Chapter Coordinating Committee Steering Subcommittee is responsible for selecting the recipients of the following awards: Outstanding Small Chapter and Outstanding Medium Chapter. From time to time, a Most Improved Chapter Award may be presented.

Outstanding Chapter Award recipients will be selected on the basis of information provided on the Outstanding Chapter Award Entry Form.

**Most Improved Chapter:** Selected when appropriate to acknowledge a chapter that significantly advanced its services to members and the community in a given year.

**Presentation:** All chapter awards will be presented at the TXCPA Annual Meeting with sufficient information about achievements to acknowledge the chapters receiving the award.

**Recognition of Chapter Award Recipients:** The chapter president whose leadership was instrumental in the chapter's receipt of the award will receive a plaque. The chapter will receive appropriate recognition.

All award recipients will be acknowledged by a brief account of accomplishments that resulted in receiving the award. Awards and their recipients will be publicized in appropriate TXCPA publications.

**YEAR-END REPORT FORM  
OUTSTANDING TXCPA CHAPTER AWARD**

**DUE: MAY 20, 2026**

This form constitutes the chapter annual report.

**Entry form must be received at TXCPA by midnight, May 20, 2026, to be considered for an Outstanding Chapter Award.**

Please complete this form and email to Rori Shaw (rshaw@tx.cpa).

By sending it to TXCPA, the chapter agrees to allow the completed form to be posted on the Internet after it is received.

**Chapter:** TXCPA East Texas

**President:** Kevan Kirksey, CPA

**President email:** kkirksey@henrypeters.com

**Executive director/secretary:** Rori Shaw, CAE

**Executive director/secretary email:** rshaw@tx.cpa

**Please fill in the following:**

Number of members June 2025:	937
Number of members April 2026:	1,021
Number of new members:	14
Number of member reinstates:	175
Number of hours of CPE programming provided by chapter:	76

**List your chapter goals for each area listed below and provide details on the outcomes, any available metrics, and information about the work done towards these goals.**

**Community and Membership**

**1. Achieve the milestone of 950 chapter members**

As of May 18, 2026, TXCPA East Texas has achieved a total of **1,016 members**, exceeding our annual goal of 950 and surpassing last year's membership total. This marks a significant accomplishment for the chapter and reflects strong engagement and outreach efforts.

To support membership growth, the chapter participated in TXCPA's statewide campaign targeting prospective members. A list of nonmembers was provided to board members, who then conducted personal outreach to CPAs they knew who were not currently members.

In addition, the chapter made a focused effort to promote free student membership by connecting with university students and faculty. Social media graphics and messaging were created to share with professors and students, as well as with board members and active volunteers, encouraging them to promote TXCPA East Texas membership on their personal and professional networks.

These coordinated efforts contributed to a successful membership year and further strengthened the chapter's presence across the region.

## **2. Achieve 92% overall retention of chapter members.**

TXCPA East Texas achieved an overall member retention rate of 89% this year, just shy of the chapter's goal. Despite narrowly missing the target, this remains a strong retention rate and reflects the chapter's dedicated efforts to engage members and support renewals.

In preparation for the annual membership drop in September, chapter board members conducted personal outreach to individuals who had not yet renewed. These efforts encouraged continued participation and reinforced the chapter's commitment to member engagement.

The chapter president also played an active role in outreach by contacting new licensees each month to welcome them to TXCPA and share opportunities to connect with the East Texas chapter. New licensees were recognized and welcomed during the CPE Expo, helping reinforce their value to both the profession and the chapter.

To support renewal efforts, custom social media graphics highlighting TXCPA East Texas membership benefits were created and shared with board members for use across their personal networks. The chapter also conducted outreach to local firms and companies to promote the TXCPA Professional Group Membership program as a way to strengthen organizational involvement.

Throughout the year, the chapter newsletter also featured member spotlights highlighting chapter members and their professional contributions.

These combined efforts contributed to a successful year of member retention, engagement and outreach within the chapter.

## **3. Provide opportunities for members to be involved in both advancing the profession and serving the community.**

Action items included providing a community service project for chapter participation during CPA Month of Service, continuing to grow the leadership program offered by the chapter for the development of young CPAs; and offer a social event(s) for participation by members and students.

### **Community Service – Summer School Supply Drive**

Members were invited to help provide essential school supplies to local students in need. Donations could be made by purchasing items directly from the chapter's Amazon wish lists or by dropping off school supplies at designated locations in Tyler, Longview and Lufkin. All donated supplies were distributed to local organizations serving students and families within those communities.

### **Community Service – CPA Month of Service**

In November, the chapter hosted a toy drive benefiting Toys for Tots and Hiway 80 Mission as part of TXCPA's Month of Service. Members were invited to donate money-minded toys through an Amazon wish list or by dropping off items at designated locations in Tyler, Longview and Lufkin. Thanks to the generous support of chapter members, multiple large boxes of toys were delivered to local Toys for Tots warehouses throughout the region, as well as to Hiway 80 Mission.

### **2025 Leadership Day**

The 2025 TXCPA East Texas Leadership Day was held on Monday, August 4, at The Foundry Coffee House in Tyler, welcoming 31 participants. The event focused on developing strong and confident leaders in the profession.

- Adam Tarnow led a workshop that equips leaders with practical tools and a fresh perspective to navigate uncertainty, regain clarity, and lead effectively through today's complex workplace challenges
- Favor Lee offered insights on how to build and sustain meaningful relationships through personalized engagement, consistent communication, active listening, and trust-building strategies that strengthen both individual and organizational success..
- Kim Knox-Lewis provided tips and techniques for effective public speaking.

The day concluded with a leadership panel and wrapped up with a happy hour at Tru Vine Brewing Co., bringing together Leadership Day attendees and chapter leaders for fellowship and networking.

### **Social Events**

In June, the chapter hosted a Behind-the-Scenes Brewery Tour at Rusty Axe Brewing in Lufkin, creating a relaxed and engaging environment for members to connect. Attendees enjoyed an exclusive brewmaster-led tour, food, and meaningful conversation—strengthening relationships and reinforcing a sense of community within the profession.

The chapter also created an informal networking series, "Keeping Up with Kevan," featuring Chapter President Kevan Kirskey and held across Tyler, Longview, and Lufkin. These gatherings—ranging from happy hours to breakfast and coffee meet-ups—focused on open dialogue, member engagement, and opportunities for involvement in chapter activities.

In addition, ABC Connect—Networking for Attorneys, Bankers, and CPAs—was held Thursday, April 30 at three locations across East Texas. This relaxed happy hour format brought together professionals from across disciplines to foster meaningful connections and encourage collaboration. Members were invited to bring colleagues from legal and banking professions, further expanding the chapter's professional network.

Together, these activities reflect the chapter's ongoing commitment to creating meaningful opportunities for service, connection, and leadership growth among current and future CPAs.

## **Pipeline**

- 1. Continue, grow and strengthen Accounting Career Awareness (ACE) program and engagement with local high schools, junior colleges and universities utilizing the Pipeline Committee. Reach 1,000 college, high school, junior high and elementary students.**

TXCPA East Texas made even more significant strides this year in building the CPA pipeline and supporting accounting education across the region.

### **Pipeline Committee**

The committee met monthly to coordinate efforts and plan outreach initiatives. A comprehensive list of schools and junior colleges in the chapter's region was developed to ensure broad reach and equitable access.

The chapter sent outreach emails to every school district in the region, offering classroom presentations on accounting careers and financial literacy. To streamline communication, the chapter created:

- Educator Request Forms to capture school interest in hosting presentation
- Volunteer Request Forms to identify CPAs and accounting professionals willing to present

Through these efforts, the chapter delivered presentations or participated in career fairs in Lindale, Longview, Whitehouse, Kilgore, Tyler, Hallsville, and Huntington. Committee and chapter members also participated in CTE Advisory Groups in Whitehouse, Hallsville, Tyler, and Lindale.

For Month of Service and Accounting Opportunities Month, the chapter also sent six money-minded books to elementary schools in Tyler, Longview, and Lufkin. Two UT Tyler BAP students read to students at Rice Elementary School. Additional books were sent to Everhart Magnet Elementary School in Longview and Herty Primary School in Lufkin.

The chapter set a stretch goal of reaching 1,500 students and reached 1,460 students, falling just short of the stretch goal while significantly exceeding the original target of 1,000 students by 46%.

### **University Outreach**

- TXCPA East Texas also prioritized engagement at the college level:
- Participated in career fairs at East Texas Baptist University (ETBU), LeTourneau University, Stephen F. Austin State University (SFASU), and the University of Texas at Tyler (UT Tyler).
- Made classroom presentations at LeTourneau University and Trinity Valley Community College.
- Co-hosted a CPA2B Bootcamp at SFASU in February with UT Tyler BAP and Becker at UT Tyler. This full-day event helped accounting students gain clarity, confidence, and connections as they explored the CPA profession by hearing directly from CPAs and recruiters about career paths, employer expectations, and CPA exam preparation. Participants received guidance on audit versus tax careers, licensure requirements, and professional development tips while networking with accounting leaders across East Texas; the event drew more than 100 students, including online participants.
- Participated in UT Tyler's Meet the Firms event.
- Contributed more than \$3,000 to student accounting associations at UT Tyler and SFASU, supporting student programming and professional development.

These robust initiatives reflect the chapter's commitment to cultivating a strong, diverse, and informed pipeline of future CPAs across East Texas.

## **2. Continue providing local scholarships with a fundraising goal of \$50,000.**

The 2025 Tal Glenn Memorial Golf Tournament was held on October 27 at The Cascades in Tyler.

This signature event raises critical funds to support scholarships for outstanding accounting students from East Texas or attending universities in the region.

Since its inception in 1996, TXCPA East Texas has awarded more than \$425,000 in scholarships, demonstrating the chapter's long-standing commitment to the future of the profession.

The 2025 tournament continued that tradition of success:

- 32 sponsors and 23 teams participated
- Total revenue of more than \$58,000 including teams, sponsors, prize drawing, scholarship matching, and investment funds
- Net revenue exceeded \$42,000, marking an approximately 8% increase over the previous year

These funds directly supported the chapter's 2025–26 scholarship program. A total of \$31,000 in scholarships was awarded to seven deserving accounting students from two local universities.

This annual event not only generates essential scholarship funds but also strengthens connections between members, firms, and the community in a meaningful and lasting way.

## Advocacy

### 1. **Achieve PAC contribution goal for 2025-26 of \$4,620 with 100% of board participation.**

While the chapter fell short of its annual PAC fundraising goal, we proudly achieved 71% of our goal and are especially pleased to report 100% board participation in PAC giving.

To encourage contributions and raise awareness of the PAC's importance, the chapter took the following actions throughout the year:

- Included informational blurbs in chapter newsletters
- Sent personalized letters to past contributors in February
- Distributed targeted eblasts to members during key points in the year

The chapter also hosted a PAC Reception in January with Bryan Hughes as a special guest for an evening of conversation and advocacy. Attendees heard about the PAC's recent successes, upcoming priorities, and how continued engagement helps strengthen and protect the CPA profession in Texas; the event drew more than 20 attendees.

The chapter remains committed to supporting TXCPA's advocacy efforts and will continue to prioritize PAC awareness and engagement in the year ahead.

## Learning

### 1. **Provide high-quality CPE that is accessible and affordable for members by providing at least 60 hours of CPE.**

TXCPA East Texas offered a robust lineup of continuing education opportunities in 2024–25, delivering a total of 76 hours of CPE to members across the region.

Course offerings included:

- Annual Standards Update and Identifying and Reporting Control Deficiencies
- 16 hours of Governmental Accounting and Auditing Updates
- 8 hours of Taxation of S Corporations and Shareholders
- Leadership Day, focusing on professional and personal development
- Two free one-hour lunch-and-learn opportunities in Tyler and Longview on OBBBA as a member benefit.
- Three Federal Tax Updates held in Tyler and Longview
- Ethics for CPAs

- The chapter's flagship event: the annual CPE Expo

These diverse offerings reflect the chapter's ongoing commitment to providing relevant, high-quality education that supports the evolving needs of our members.

**OPTIONAL: List any other activities, programs and services not mentioned above in your goals that were offered by the chapter (or new to the chapter).**

**TXCPA East Texas was proud to celebrate the accomplishments and leadership of our members at the state and local levels:**

- At TXCPA's Annual Meeting of Members on June 26, 2025, three East Texas members received prestigious state honors:
  - David Marks was recognized as one of the four *Outstanding Accounting Educator Awards* for excellence in teaching and having distinguished themselves through active service to the accounting profession.
  - Veronda Willis was recognized with Kenneth W. Hurst Fellow Award which recognizes long-time contributors and supporters of AcctoFi.
  - Jeff Lindenmoyer was recognized as a 2025 TXCPA Rising Star.
- Also at TXCPA's Annual Meeting of Members, TXCPA East Texas, was recognized as Outstanding Medium Chapter for our standout year, making a big impact through education, outreach, and community service.
- We are also well-represented on the TXCPA Leadership Council, with members: AJ Evans, Mehgan Ibanez, Kathy Kapka (Past TXCPA Chair), Kevan Kirksey, Royce Read, Ruben Rodriguez, Heather Sanders, and Rebecca VanNattan.
- 15 chapter members served on 15 TXCPA statewide committees this year, and 35 members served on TXCPA East Texas committees.

Volunteers are truly the heart of TXCPA East Texas. We are proud of the many ways our members lead and contribute to the profession locally and across the state.