

# SOUTHERN CHESTER COUNTY CONNECTIONS

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# For Belfint, Lyons & Shuman, it's been 100 years and accounting

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This year the CPA firm of Belfint, Lyons & Shuman, P.A. celebrates a century of public accounting. One thing that has remained the same over that 100-year history has been the CPA firm's emphasis on building relationships with people.

"When you think of CPA firms, you think of having taxes done," said Jonathan Moll, the executive director of strategy for the firm that's based in Wilmington and has a strong base through its West Chester office. "We do traditional compliance and tax preparation services but with a focus on building relationships."

But Belfint, Lyons & Shuman (BLS) is not at all like the stuffy stereotype one might imagine when thinking about a century-old CPA firm. Besides a state-of-the-art renovation to its offices, the firm incorporates cutting-edge ideas and applications and has a millennial-heavy visioning group that has been working to establish a progressive vision for the future.

"You can see how the 'tools' needed have changed from pencil and paper to user-friendly, application-based programs," according to a post on the BLS LinkedIn page. "Our firm is invested in our future and will continue to better these tools while never losing sight of quality and security."

The firm also has 13 owners, most of whom have joined the ownership group in the past decade.

"We went through a significant succession of the ownership group, and the current ownership group is very progressive while never losing sight of what we have learned from our predecessors," Moll said. "A lot is new about us and yet we're celebrating 100 years."

Moll described BLS as an advisory firm that offers CPA services and cares about growing the CPA-client relationship.

"We always want to have a seat at the table to help (our clients) make informed decisions about whatever their goals are," said Jenni Fleck Jones, who works in marketing and college recruiting for BLS.

The focus on their clients began in 1923 when Charles Belfint established the firm as C.I. Belfint & Co. and has continued over the last 100 years. According to the website, Belfint "created an accounting practice where clients received an interactive and personal approach to accounting and tax management services."

The personal approach is something that every employee of BLS is encouraged to practice.

"Our culture is built on responsiveness and ability to provide clients with real-time solutions," Moll said. "From the top on down, our managers, shareholders, and team members are involved. We think it's important to really be responsive to our clients."

The firm also places a large emphasis on community involvement, representing part of its core values.

"We give back in various ways to the local community and also to causes that are important to our individual team members," said Jones.

Moll added that the firm encourages all its members, as well as the interns, to volunteer in the community.

In August, BLS members and interns volunteered at Ingleside Homes. "They scraped and painted the fence in front of the building as part of a beautification project," a Facebook post read about the project at the nonprofit senior citizen-centered organization. "Some may have gotten more paint on themselves ... LOL! Seeing the difference made with the fence was very rewarding, but the interactions with the residents were priceless!"

As part of the century celebration – check out the #100YearsAndAccounting hashtag -- an outside consultant was brought in to help develop an introspective





visioning process.

"The time is really now to start with a blank canvas," Moll said. "We wanted this vision to be fresh and really set us up for the next 10 to 15 years."

The vision formation group had a cross-section of all generations within the firm, representing different practices.

"It was a great process," Moll said. "Our perspective of what we do as a vision is something that's going to continue to evolve."

BLS has an internship program that counts among its alumni some of the current leadership. Jones said that in January the firm welcomed three new shareholders who came through the intern program.

The firm also provides an externship program which is open to high school and college students that just want to learn about a career in public accounting. In fact there were former Avon Grove students who participated in the firm's most recent summer externship. "We even have people who attend who are doing a change in career," Jones said. "We're just trying to give them perspective on what a career

in public accounting is like."

And when new members join the firm from college, they are given time to work with each of BLS practice groups in their Rotational Development program, from international services to accounting and auditing to small business and corporate tax, before they decide on their specialties.

"It helps with retention," Moll said. "We don't pigeonhole them. We let them choose what they want to do."

The 100th anniversary celebration will continue throughout the year. To learn more about how BLS is celebrating it, check them out on these platforms:

Web: [www.belfint.com](http://www.belfint.com)

Facebook: @BelfintCPAs

LinkedIn: <https://www.linkedin.com/company/belfint-lyons-&-shuman-p-a>

Instagram: [www.instagram.com/belfintcpas](https://www.instagram.com/belfintcpas)

YouTube: [www.youtube.com/belfintlyonsshumancpas2225](https://www.youtube.com/belfintlyonsshumancpas2225)

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