



**Stephen T. Newman, CPA\***

Managing Director

Mr. Newman joined Hollis Associates after over a decade working in the accounting and financial fields.

His current work with Hollis Associates involves working with clients in consulting, recapitalization, and merger/acquisition transactions.

Prior to joining the firm he worked at Deloitte & Touche where his clients included a substantial private equity group, a number of major corporate clients, and privately held businesses for which he conducted review and verification of financial information and reporting for a variety of acquisitions and divestitures.

Before joining Deloitte & Touche, Steve was a senior associate at Morgan Stanley where he worked with companies, high net worth families, individuals, selected foundations and pension funds. He also worked with a variety of investment banking firms in evaluating IPOs and other offerings for client investments. He assessed economic/political trends and analyst research reports in conjunction with his client transactions. His activities additionally involved assisting with coordination of responses to Request for Proposals and working on marketing strategies to enhance sales channels.

His professional career began with PaineWebber (which later merged with UBS Wealth Management) where he worked on a successful major software product launch applying technology applications to asset allocation models and portfolio management. He also served as the primary liaison with the systems engineering group on assessing implementation of a number of new applications for the performance reporting group.

In addition, Stephen worked with The Hartford where he was engaged in consultative practice reviews for compliance and financial operations across the Hartford Life division, which includes a variety of insurance and wealth management products.

Mr. Newman is a member of the Connecticut Society of Certified Public Accountants (CS-CPA) and the International Business Brokers Association (IBBA). He has a Master of Science in Accounting and Taxation from the University of Hartford and has his Bachelor of Science from Ramapo College of New Jersey. His activities include membership in Toastmasters International and service as a board member and active participant in a variety of community and charitable organizations.

\* While Steve is a registered CPA certificate holder in Connecticut, he is not currently licensed or practicing as a CPA.