

# **Kathy Steffan**

**CPA, CA, Partner at Welch LLP**

Toronto, ON, CA

Experienced in a broad range of private client engagements and solutions, from Assurance and compilation to Start-up enterprises.

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Kathy Steffan's experience has focused on a broad range of private client engagements and solutions including Assurance and compilation, Outsourced CFO/ Controllership, Virtual Accounting Office, Foreign Business coming into Canada, and Start-up enterprises. In addition, she has done assurance work for Government funded and Not for Profit organizations; and been involved with Initial Public Offerings (IPO's).

Kathy was recruited to Welch to head up the brand new Toronto office which opened in 2011. She graduated from the University of Toronto with a Bachelor of Commerce in 1979 and obtained her CA designation in 1982. Her experience before Welch LLP includes Ernst & Young (Clarkson Gordon) 1979 to 1982; Murray Keeso 1982 to 1983; Sole Practitioner 1984 to 2004; Lannick Group of Companies 2004 to 2008; Fuller Landau LLP 2008 to 2011.

Away from the office, she is an avid fitness fanatic and participates in the following sports: swimming, yoga, golf and running. She loves to entertain and prepare gourmet meals for her family and friends.

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Keynote, Moderator, Panelist, Workshop, Host/MC, Corporate Training

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Accounting, Non-Profit/Charitable, Food and Beverages, Financial Services, Management Consulting

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Leadership, Management, Accounting, Financial Planning

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Canadian Institute of Chartered Accountants , Institute of Chartered Accountants of Ontario, Canadian Society of Association Executives

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**Canadian Institute of Chartered Accountants**

CA Accounting

**University of Toronto**

Bachelor of Commerce

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**Partner - Welch LLP**

Welch LLP is a Chartered Professional Accounting firm that provides a full range of accounting, assurance, tax, advisory and specialty services. Welch was founded in 1918 and has over 270 staff spread among 12 offices in Eastern Ontario, Toronto and Quebec. Welch offers private enterprises, government and not-for-profit organizations industry specific services and knowledge with a relationship-driven approach to client service.

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**Senior Manager – Fuller Landau LLP (professional)**

Led the re-branding and facelift of the Business Enterprise Solutions Team ("BEST"), a fast-growing division of the firm's practice which provides the following services: CFO/Finance department services including bookkeeping, payroll, managing banking and finance relationships, cash flow management, management reporting, government filings and general business advice; Notice to Reader (NTR) Financial Statements; corporate income tax preparation, planning and filing; investment company accounting

**Director of Finance & Administration – Lannick Group of Companies**

Directed all aspects of financial administration and operations including financial reporting and analysis, budgeting, forecasting, coordination of annual audit with external auditors, internal and external payrolls, and human resources administration for Canada's largest privately-owned executive search and contract placement firm for financial executives and personnel. Kathy reported to the Chief Executive Officer and Chairman.

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