



MACHEN McCCHESNEY

Returning Value for 65 Years

From our 1954 origin as a small tax and bookkeeping practice to the large regional full-service accounting and business advisory firm we are today, our philosophy has remained unchanged: our clients deserve candid service with a commitment to consistently *Returning Value*.

We deliver on this philosophy by:

- Recruiting high-caliber individuals who will provide the quality of service and personalized attention our clients require and deserve
- Creating thought leadership that keeps our people and our clients ahead of the curve
- Performing sound proactive procedures and experienced analysis to identify opportunities, achieve results present solutions and provide accountability
- Developing industry and service specializations tailored to best serve our clients
- Giving back and being active members in our community and industry associations

Machen McCchesney pledges to *Return Value* to our clients, employees, communities and business partners on a daily basis.

Returning Value to our Clients

We pledge to maintain the highest level of integrity, quality, and service in each of our interactions and seek long-lasting mutually beneficial relationships that make a difference for our clients and promote their success. Clients understand we utilize our experience and resources to solve complex issues and commit to providing excellence, proactive service, and relationships with a highly skilled professional team.

Returning Value to our Employees

We pledge to maintain an environment where our people can develop strong connections and meaningful relationships. We encourage our team members to spend time with their family, creating a work/life environment that enhances family, social, and professional growth. We enjoy each other's companies and believe in having a great time together whether we are tailgating before a football game, bowling, recruiting or celebrating at our annual firm-wide lake day.

Returning Value to our Communities and Business Partners

We pledge to give back and believe it is our social responsibility to improve the communities in which we live and serve. Every employee is encouraged to actively serve in the community. A measurable impact is our teams 2017 annual contribution of over 250 work hours and countless personal hours serving over 35 charitable, civic and community organizations. However the greatest impact is immeasurable, "Changed Lives".

Historical Timeline

Don McCchesney, having earned his degree from North Carolina State in 1940, moved to Auburn, Alabama in 1947 to teach accounting at Auburn University. After teaching for seven years, Don, along with two other accounting professors began the practice in 1954 under the name of Gritz, Hill & McCchesney, located at

Toomer's Corner. Don's passion for serving clients led him to become the firm's first Managing Partner while both Gritz and Hill returned over time to their first love of teaching.

Don Machen, a graduate of Auburn University, started working for the firm in 1963 and by 1965 became a partner. At that time the firm began operating under the name of McChesney & Machen. Don served as the firm's second Managing Partner from 1983 until his retirement in 2002. Don had a passion for serving, especially in the profession he loved so much. He served on many ASCPA boards, committees and leadership positions including ASCPA President in 1989 and AICPA council representative for seven years.

Anne May, a graduate of Auburn and Florida State, started working for the firm in 1974, became a partner in 1982 and served as Managing Partner from 2002 through 2009. Anne, daughter of Don McChesney, provided great leadership for the firm, Auburn community, and accounting profession. She served as ASCPA Vice-President, Treasurer, and Council Member. Anne retired in 2018 after more than 48 years in the accounting profession and continues on with the firm as a consultant.

Don Chastain, a graduate of Auburn University, started working for the firm in 1983. In 1984, Don joined Anne May and Don Machen as a partner and the firm changed its name to Machen, McChesney & Chastain. Don has been active in the community through his service in various civic organizations and has focused 44 years of experience to develop the firm's tax practice.

The firm flourished in the 1990's growing its tax, accounting, auditing, and management advisory services with the addition of three new partners and a facility expansion. Marty Williams, a graduate of Auburn University, started with the firm in 1990, became a partner in 1996, and since 2009 has served as the firm's Managing Partner. Mike Machen, son of Don Machen and a graduate of the University of North Alabama, started working for the firm in 1993 and became a partner in 1996. Mike, who has served as a President of the Auburn Chamber of Commerce, has 28 years of experience and leads the firm's accounting, business advisory, and valuation services. Melissa W. Motley came to the firm in 1991 and became a partner in 1996. Melissa, a graduate of Auburn University, has utilized her 30 years of experience to grow both the audit and tax services of the firm.

In 2001, the firm became a member of BDO Alliance USA, a nationwide association of independently owned, high-quality local and regional accounting firms that share our commitment to exemplary service and value. Through this alliance, the firm is able to offer clients access to the same range of extended capabilities as those provided by any major international accounting firm.

In 2009, Aaron Waller, who started working for the firm in 1998, became a partner. Aaron, a graduate of Auburn University, has extensive auditing experience and leads the firm's audit and assurance services.

In 2015 the firm, who for 31 years had operated under Machen, McChesney & Chastain rebranded and is known today as Machen McChesney. In 2016, Machen McChesney merged in Wolf & Taunton, an accounting firm located in Montgomery, AL. Combining forces under the Machen McChesney name, the merger allowed both firms to better serve the ever-growing needs of our expanding client base, as well as have a greater positive impact on our region. Bobby Taunton, a graduate of Auburn University, with over 35 years tax and advisory experience leads the firm's Montgomery office.

In 2018 the firm added four new partners Louis Hawkins, Jessica Pagan, Lesley Price, and Nick Wheeler. **"The focus of our growth is grounded in our continual effort to best serve our clients. We understand having a large, competent, and highly motivated team provides our clients access to deep advisory knowledge and industry-specific expertise while receiving individualized attention and timely service,"** states Marty Williams, Managing Partner.

Machen McChesney has grown to be a regional firm expanding services to meet the evolving needs of our clients. In addition to traditional CPA and business advisory services, our team *Returns Value* through wealth management services and a comprehensive payroll, HR, and benefits services company under the name of FocusPay Solutions. With over 20 certified public accountants and over 40 total staff members, the firm recently ranked nationally among the top 400 accounting firms by INSIDE Public Accounting.