



NOVEMBER 2009 – "Special Edition"

The NLI is issuing this "Special Edition" to share with our readers an inspiring insight into a leading community service CPA Firm, Malin Bergquist, one of the NLI's annual sponsors.

MALIN BERGQUIST

When we hear the phrase "accounting firm", we're likely to think of number crunchers holed up in windowless desks or cubes, surrounded by piles of audits as they manipulate rows and columns of figures on spreadsheets. While we're not likely to think of those same accountants delivering books about cancer to a local elementary school, sponsoring an ice cream social for mentally challenged individuals or inspiring a major Pittsburgh business newspaper to launch a philanthropy webpage - that's precisely what the staff and leadership of Malin Bergquist's three Pennsylvania offices do during "billable hours".

Malin Bergquist was founded more than 40 years ago and its philanthropic philosophy and passion for service has matched the pace of its rapid expansion. The company is the result of four CPA firms merging in the last eight years and proudly serves clients throughout Western Pennsylvania with offices in Erie, Pittsburgh and Greensburg. Its non-profit team currently advises 150 tax exempt clients and provides assistance to another 75 tax exempt organizations by performing pro bono work or sitting on their boards.

Understanding Malin Bergquist's service mindset, it comes as no surprise that its employees chose to handle grief over the loss of three beloved employees to cancer within months of each other in 2007 and 2008 by springing into action to serve others in their memory.

"We needed a firm-wide outlet for our grief. Our partners stepped up to take over the workload and still support the family members left behind. It was a difficult and painful time for us, and we thought, how can we best honor the legacy of our friends? How can we ensure their deaths were not in vain?" explained Vincent Halupczynski, Partner and head of the firm's Not for Profit practice.

"So we approached the American Cancer Society and requested the opportunity to fundraise in memory of Peter Delio, Michael Bergquist and Ruth Ann Deluzio with the understanding that our firm would match whatever amount was raised by our staff, one hundred percent."

That effort resulted in the acquisition and delivery of a four volume set of children's books to 400 public libraries and school guidance counselors in western Pennsylvania. With titles including, "Angels and Monsters", "Cancer In The Family", "Our Mom Has Cancer", and, "Our Dad Is Getting Better," these books help children and teenagers cope with the impact of cancer and provide comfort and support in the midst of their families' suffering. While it is not mandatory that employees contribute to the distribution effort, more than 95% of the firm's

120 employees put aside their work and a portion of their paycheck to make sure the books reach the kids and teens who need them. Deliveries will continue through 2009.

In 2008, with the book project as inspiration, the Pittsburgh Business Times launched a new webpage, Philanthropy Inc., an online community where not-for-profit organizations present wish lists for contributions from the business community that deliver meaningful donations.

"We're surrounded by wonderful people here with a like-minded worldview who share a desire to give back," says Mark Miner, Malin Bergquist's Chief Marketing Officer.

"The way we handled this project is the same manner in which we care for our clients, firms and vendors. We place an extraordinary value on relationships and their meaning. Most people probably think of accountants as being stuck in an office. Our CEO David Bluemling is continually encouraging us to get out of the office, to get into the community. This is what we do. This is what we're about."



While cancer may be the firm's signature charity, Malin Bergquist also contributes to humanitarian causes supporting mental health issues and economic development initiatives that advance regional and international business relationships.

The G-20 Summit website they created to promote their German clientele was so inviting that non-patrons requested to be included on the site.

"It was our hope that with this once-in-a-lifetime experience, a light would be shined upon Pittsburgh, and we could showcase all of the wonderful opportunities in this city to work with German companies and assist with growth from an international investment standpoint," said Jeffrey Deane, Partner and head of the firm's International Business group.

Lanxess, a Bayer spinoff and chemical, rubber and plastics manufacturer joined Ardex, Draeger Safety and Flabeg Solar on Malin Bergquist's G-20 site to highlight the possibilities inherent in locating to Pittsburgh.

"The G-20 provided us with a unique opportunity to create a German-American executive group beyond the webpage. We plan to have a close group of colleagues who can continue to promote Pittsburgh and the southwestern Pennsylvania region to Germany in cooperation with the Allegheny Conference and Pittsburgh Regional Alliance," Miner said.

No doubt, the German companies they recruit to this area will note the firm's altruism as just one desirable incentive to locate to this "most livable city" they'll come to call home.