

# THE LIST ACCOUNTING FIRMS

► Ranked by number of local professionals as of December 1, 2020

Rank	Firm Address Website Phone		Local professionals: 2020 2019 % + (-)	Local: CPAs Partners	Local: Employees Offices	Companywide: Professionals CPAs Offices	Primary accounting services offered	Top local executive(s) Year est. locally	
<b>1</b> (1)	<b>Deloitte LLP and subsidiaries</b> 655 W. Broadway, Suite 700, San Diego 92101 www.deloitte.com 619-237-6500	<b>Deloitte.</b>	423 443 (5)	107 45	450 2	333,000 10,174 150	In the U.S., the subsidiaries of Deloitte LLP provide audit, tax, advisory and consulting services.	Julie Stone Moran 1957	
<b>2</b> (2)	<b>Ernst &amp; Young LLP</b> 4365 Executive Drive, Suite 1600, San Diego 92121 www.ey.com 858-535-7200		338 346 (2)	140 35	377 1	298,965 na 728	Assurance, tax, advisory, transaction support	Robert Bruning 1958	
<b>3</b> (3)	<b>KPMG LLP</b> 4655 Executive Drive, Suite 1100, San Diego 92121 www.kpmg.com/us 858-750-7100		280 277 1	82 26	280 1	219,000 9,342 na	Federal, state, local, international tax, audit, I/A outsourcing, valuation, IT and management consulting, forensic	Cathy Gonzales 1961	
<b>4</b> (4)	<b>PricewaterhouseCoopers LLP</b> 5375 Mira Sorrento Place, Suite 300, San Diego 92121 www.pwc.com 858-677-2400		225 225 0	51 18	250 1	251,000 na 800	Assurance, tax, information technology, performance improvement advisory services	Eric Hornsten 1963	
<b>5</b> (6)	<b>RSM US LLP</b> 3430 Carmel Mountain Road, Suite 200, San Diego 92121 www.rsmus.com 619-281-7764		114 112 2	34 11	131 1	43,000 na 810	Assurance, tax, international business services, SEC, financial & risk advisory, technology	Jerry Varga 1977	
<b>6</b> (8)	<b>CBIZ &amp; MHM</b> 13500 Evening Creek Drive North, Suite 450, San Diego 92128 www.cbiz.com/www.mhmcpa.com 858-795-2000		104 92 13	45 25	127 2	3,959 983 91	Assurance, tax, consulting, R&D tax, international tax, SSAE 16/SOC, ERISA assurance	Paul Nation 1980	
<b>7</b> (5)	<b>BDO USA LLP</b> 3570 Carmel Mountain Road, Suite 400, San Diego 92130 www.bdo.com 858-404-9200		103 104 (1)	48 11	114 1	91,504 na 1,658	Advisory, audit & assurance, consulting, tax & strategic tax services	Benjamin Williams Jamie Mason Lee Duran 2007	
<b>8</b> (7)	<b>Moss Adams</b> 4747 Executive Drive, San Diego 92121 www.mossadams.com 858-627-1400		102 94 9	59 11	110 1	3,199 1,267 33	Full-range accounting, tax, financial, business advisory services, wealth management	Gerardo Godinez 1964	

(NR) Not ranked

na Not applicable

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## CUSTOM CONTENT

# CFO Systems, LLC

CFO Systems, LLC established an office in San Diego in 2020, and its new expansion plan envisions doubling revenue and employment by the end of 2021. CFO Systems originated in Omaha and provides outsourced fractional CFOs, controllers, senior accountants, procurement and HR professionals, with a high level of experience and expertise. The overall company has 48 professionals throughout North America. Its San Diego Office, that serves the Southern California region, currently has three full time professionals and one that spreads his time between San Diego and Iowa.

Expertise includes agriculture, biotech, retail, SaaS/software, health care, and manufacturing industries in for-profit public and private companies as well as non-profit organizations. The office started with Jordan and has rapidly added more scale. "We're getting traction now and growing the client base," Jordan said. "We talk to enough people in the market and businesses are recognizing the value of fractional CFO's as an option. Heading into 2021, our vision is to double in size from a revenue standpoint and grow our people from 4 to 8 by the end of 2021 and to 15 people by 2022."

Typical clients are middle-market companies generating \$5 million to \$100 million in annual revenue. They are growing and looking to scale and professionalize their financial systems – but aren't big enough to need a full-time CFO. San Diego is a target-rich environment for that type of business.

"We have a team that can mobilize quickly and solve issues," Jordan noted. "We pride ourselves in the ability to scale to whatever level our clients need, whether that's 60 hours a week to complete a specific project or just 10 hours a month to bring CFO strategic vision and value."

CFO Systems also launched a nationwide service called CFO Systems Search & Staffing. This new division means CFO Systems now can temporarily fill a void while also search for a full-time hire.

"We can create a lot of calm in some pretty stressful situations for companies, helping them keep all the filings on time and all the balls in the air while we search to find

their new CFO or other financial professional," Jordan stated. "We have a wide range of experience as well since we've worked with companies going public, going through private equity transactions, balance sheet restructurings, implementing new software and many other projects. Our procurement professionals can assist with negotiations, contracting, and supplier management to maximize cost efficiency and improve the bottom line. We have over 1,700 years of experience across all of our professionals."

If you need our help, or would like more information about joining our organization, reach out to Karen at KJordan@cfosystemsllc.com or info@cfosystemsllc.com; Tel: (402)884-0066; www.cfosystemsllc.com

## CFO systems



**Karen Jordan**

San Diego office leader and recipient of the 2018 SDBJ CFO of The Year award



**John Lomoro**

Former CFO of Trackforce Valiant and SVP, Finance-North America of Kyriba Corp.



**Martin Magallanes**

Former VP Finance/Sr. Director Strategic Planning of Guess?, Inc










**LaDon Johnson**

Former president and CFO of Icicle Seafoods, Inc. (San Diego and Iowa)

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9 (NR)	Duffy Kruspodin LLP 4225 Executive Square, Suite 900, La Jolla 92037 www.dklpcpa.com 858-642-5050		84 67 25	42 8	112 2	138 73 4	Audit, tax & consulting, business mgmt, business valuations, litigation support, and wealth advisory	Joshua Bodensadt 1993	
10 (9)	Lavine Lofgren Morris & Engelberg LLP 4180 La Jolla Village Drive, Suite 300, La Jolla 92037 www.llme.com 858-455-1200		81 80 1	46 11	87 1	87 46 1	Audit, review, income tax services, multistate, corporate, partnership, LLC, estate and trust	H. Scott Jablow 1985	
11 (10)	Baker Tilly <sup>(1)</sup> 3655 Nobel Drive, Suite 300, San Diego 92122 www.bakertilly.com 858-597-4100		80 83 (4)	35 14	83 1	4,200 1,340 66	Assurance, Tax, Consulting, Risk Advisory, Private Wealth, Transactions, International	Michael Green 1951	
12 (11)	Considine & Considine 8989 Rio San Diego Drive, Suite 250, San Diego 92108 www.cccpa.com 619-231-1977		71 65 9	38 12	81 1	71 38 1	Financial statements, audit, tax preparation, pension, estate, trust, real estate, consulting	Perry Wright 1946	
13 (NR)	Aldrich CPAs + Advisors LLP 5946 Priestly Drive, Suite 200, Carlsbad 92008 www.aldrichadvisors.com 619-810-4940		60 60 0	42 9	71 3	208 150 6	Tax planning, financial statement assurance and due diligence, retirement plan audits, etc.	Daniel Larson 1949	
14 (12)	Lindsay & Brownell LLP 4225 Executive Square, Suite 1150, La Jolla 92037 www.lindsayandbrownell.com 858-558-9200		57 55 4	33 8	72 1	53 33 na	Tax consulting & compliance, audits, reviews & compilations, transaction support, family office.	Stephen Brownell 1992	
15 (13)	Gatto, Pope & Walwick LLP 3131 Camino Del Rio N., Suite 1200, San Diego 92108 www.gpwcpcas.com 619-282-7366		48 41 17	27 11	56 1	48 27 1	Tax consulting & compliance; audit, review & compilation; family office services	Thomas McFadden 1983	
16 (14)	LevitZacks, Certified Public Accountants 450 B St., Suite 500, San Diego 92101 www.lz-cpa.com 619-238-1077		39 39 0	29 7	44 1	39 29 1	Domestic, int'l & estate tax consulting & compliance; assurance, valuations & financial reporting	Victor Ramsauer 1964	

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(1) formerly listed as Squar Milner



Leaf & Cole, LLP  
Certified Public Accountants



For over sixty years, Leaf & Cole, LLP has provided exceptional tax management, audit, and accounting services to the greater San Diego community and beyond. Our mission is to create value and efficiencies for our clients by providing personalized professional attention, combined with timely and accurate service. We are a full-service accounting firm with a particular expertise in the audits of not for profit organizations, affordable housing entities, California Special Districts, and employee benefit plans. Our tax team is dedicated to timely quality service with an emphasis on small to mid-size businesses, not-for-profit organizations, and real estate holdings.

At this time, Leaf & Cole, LLP is proud to admit Jill Branch as an audit partner. Jill brings 16 years of experience, including the audit of employee benefit plans and not-for-profit organizations, as well as audits conducted in accordance with the Office of Management and Budget's (OMB) Uniform Guidance.

**Congratulations, Jill, you earned it!**

Leaf & Cole, LLP can be reached at 619.294.7200  
or [careers@leaf-cole.com](mailto:careers@leaf-cole.com)



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17 (NR)	<b>Leaf &amp; Cole LLP</b> 2810 Camino del Rio S., Suite 200, San Diego 92108 www.leaf-cole.com 619-294-7200		35 33 6	21 9	43 1	35 21 1	Audits, reviews, compilations, business valuations, tax planning, compliance, litigation support	Michael Zizzi Nicholas Gines 1960	
18 (15)	<b>PKF</b> 2020 Camino del Rio N., Suite 500, San Diego 92108 www.pkfsandiego.com 619-238-1040		29 34 (15)	14 5	32 1	10,000 7,000 250	Audit of SEC registrants & private cos., tax, tax planning & compliance, business advisory, estates	Curt Welker 1996	
19 (18)	<b>Hutchinson and Bloodgood LLP</b> 7676 Hazard Center Drive, Suite 1150, San Diego 92108 www.hblp.com 619-849-6500		27 22 23	21 6	30 1	106 65 4	Accounting & results monitoring, auditing, tax planning & reporting, business planning & succession	Hanne LeLoup 1975	
20 (17)	<b>JGD &amp; Associates LLP</b> 9191 Towne Center Drive, Suite 340, San Diego 92122 www.jgdnet.com 858-587-1000		27 26 4	18 6	32 1	na na 1	Accounting, audit, tax planning, compliance, profit improvement & forecasting	Tom Zonaras Brian Wilcox 1977	
21 (21)	<b>CWDL CPAs</b> 5151 Murphy Canyon Road, Suite 135, San Diego 92123 www.cwdlcpa.com 858-565-2700		16 15 7	10 4	16 1	wnd 32 3	Audit, reviews, compilations, tax prep/advisory, entrepreneurial services- outsourced CFO/accounting	Mark Wilson 2013	
22 (20)	<b>Swenson Advisors LLP</b> 600 B St., Suite 1540, San Diego 92101 www.swensonadvisors.com 619-237-3400		15 16 (6)	7 2	16 2	16 7 3	Accounting & tax, SEC audit, lease accounting, SOX consulting, forensic accounting, IFRS, M&A, etc.	Stephen Austin 1998	
23 (NR)	<b>Blum &amp; Clark CPAs LLP</b> 9252 Chesapeake Drive, San Diego 92123 www.blumandclark.com 858-292-0543		13 12 8	7 1	16 1	16 7 1	Full-range tax, accounting, and consulting	Robert Blum 1978	
24 (NR)	<b>Pham Yaeger &amp; Giles LLP</b> 4275 Executive Square, Suite 440, La Jolla 92037 www.pygllp.com (858) 779-7111		12 na na	4 3	13 1	13 4 1	Tax compliance/consulting, accounting, structuring alternatives, acquisition/ disposition planning	Cuong Pham 2020	

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GPW

CERTIFIED PUBLIC ACCOUNTANTS

3131 Camino Del Rio North, Suite 1200, San Diego, CA, 92108

www.gpwcpas.com



At Gatto, Pope & Walwick, LLP (“GPW”) our guiding principle is that our clients deserve the best of our knowledge and experience. Founded in 1983, we are a boutique style firm, and though we have grown in size, we are proud to have maintained our personal touch and believe relationships are paramount. Our firm has more than 45 skilled professionals, who focus on understanding our clients and looking for opportunities to contribute to their success. We build value and trust by taking the time to clearly explain complicated tax and accounting concepts as it applies to each of their unique situations.

We don’t think this commitment to providing our best should stop at how we serve our clients. We are grateful to be part of the San Diego community and believe it is our responsibility to give back, which we do year-round with both our time and resources. Many of our members also serve as board members for community groups and organizations.

Our team at GPW is committed to giving 100% in all we do. More than coworkers, we are like family and it is thanks to this culture and our passion for excellence that we owe our success. Due to thoughtful planning, we transitioned to a work from home environment ahead of the mandatory lockdowns during the Covid-19 pandemic. And as a result, during these unprecedented times, we’ve been able to continue proactively serving our clients and community.



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25 (NR)	<b>Polito Eppich Associates LLP</b> 100 E. San Marcos Blvd., Suite 100, San Marcos 92069 www.politoeppich.com 760-599-9900		11 13 (15)	9 4	15 1	15 9 1	Accounting & auditing, tax compliance & planning, business consulting	Paul M. Polito 1962	
26 (NR)	<b>Haskell &amp; White LLP</b> 9171 Towne Centre Drive, Suite 190, San Diego 92122 www.hwcpa.com 858-249-7444		10 9 11	6 2	11 1	90 47 2	Assurance, tax consulting & planning, transaction consulting, SEC advisory, business advisory	Wayne Pinnell 2008	
27 (NR)	<b>Wastvedt &amp; Co.</b> 12626 High Bluff Drive, Suite 300, San Diego 92130 www.wastvedtco.com 858-201-6850		8 5 60	5 1	15 2	16 5 2	CPA & acct. firm, individual & business tax planning & preparation, bookkeeping, business consulting	Michael Wastvedt 2008	
28 (NR)	<b>Cashuk, Wiseman, Goldberg, Birnbaum &amp; Salem LLP</b> 3333 Camino del Rio S., Suite 230, San Diego 92108 www.cwgcpa.com 619-563-0145		7 7 0	6 4	13 1	13 6 1	Full-service accounting, compilations, certified audits, reviews, consulting, tax preparations	Rick Goldberg 1983	
29 (28)	<b>Louis Tommasino CPA &amp; Associates</b> 6265 Greenwich Drive, Suite 210, San Diego 92122 www.tommasino-cpa.com 858-623-0336		6 7 (14)	2 2	15 2	13 2 3	Business management, full- range accounting, tax planning, trust admin., multi-state, international	Louis Tommasino 1996	
30 (NR)	<b>O'Donnell &amp; Smiley</b> 7816 Ivanhoe Ave., Suite 11, La Jolla 92037 www.ostaxconsulting.com 858-522-0829		6 6 0	2 2	8 1	6 2 1	Tax compliance/consulting, accounting, structuring alternatives, acquisition/ disposition planning	Jane O'Donnell Elizabeth Smiley 2010	
31 (NR)	<b>Armando Martinez &amp; Co. CPAs</b> 365 Church Ave., Chula Vista 91910 www.armandomartinezcpas.com 619-427-1981		4 3 33	3 1	6 1	6 3 1	Taxes, management advisory services, audit, write-up	Gabriel Martinez 1978	

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LEVITZACKS

CERTIFIED PUBLIC ACCOUNTANTS



LevitZacks is incredibly proud to be on  
The List of Top Accounting Firms  
in San Diego

Our people, our culture and our leadership  
have earned us First Place in The  
Best Place to Work in San Diego  
(Small Business Category)!



Polito Eppich

CPAs and Business Advisors

BEYOND THE BALANCE SHEET

For over forty years, Polito Eppich has provided privately held businesses and high net-worth individuals with accounting, tax and consulting services. We aim to create long term, value driven relationships by being accessible to our clients, providing exceptional communication, and delivering proactive planning and strategy development.









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