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**Weaver Announces Tax Services Restructure and Leadership Changes:**

***Business Tax Services: Clint Siddons and Robert Henry***

***Private Client Services: Elizabeth Bunk and Justin Reeves***

***Investment Fund Services: Lisa Head***

***Tax Quality and Risk Management: Sam Wren and Laura Roman***

HOUSTON (June 27, 2018) – [Weaver](#), the largest independent accounting firm based in the Southwest, has restructured and expanded its tax services to enhance the firm’s ability to deliver specialized services and greater value to clients. The restructuring also expands the opportunities for employees to develop their leadership and specialized technical skills.

Effective June 1, 2018, Weaver’s tax practice includes three groups: business tax services, private client services and investment fund services. Sean Muller, CPA, is the chief operating officer for all tax services. Business tax services is now led by two partners: [Clint Siddons](#), promoted to partner-in-charge for the North Texas region; and [Robert Henry](#), promoted to partner-in-charge for the South Texas region. For the private client services group, [Elizabeth Bunk](#) was promoted to partner-in-charge for the South Texas region and [Justin Reeves](#) to partner-in-charge for the North Texas region. For the investment fund services group, [Lisa Head](#) was promoted to partner-in-charge of investment fund tax services. Working with Mark Watson, CPA, CFP, and partner-in-charge of tax quality and risk management (QRM), are [Sam Wren](#), promoted to the partner-in-charge of business tax QRM, and [Laura Roman](#), promoted to a new role as the partner-in-charge of tax education.

“Recently, we’ve added several new partners and practices such as our investment fund group,” said COO Sean Muller. “We have seen a significant increase in value from placing more focus on tax work for private equity and other alternative investment funds, as well as their portfolio companies. Growth in this sector helps us enhance the technical expertise of our team members and provide more insightful service to these niche clients.”

“This opportunity allows us to work with all of our partners and staff to take our tax service line to new heights,” Muller continued. “Together, we will deliver new value to our current and future tax clients. I look forward to what the future holds for the firm and the tax practice.”

The business tax services group focuses on compliance and consulting for public companies; private equity portfolio companies and large companies.

Weaver’s private client services group captures the majority of the firm’s current tax clients, focusing on individuals and small to mid-size businesses. They will provide tax compliance and consulting as well as estate, gift and trust tax services.

Weaver's investment fund services group focuses on compliance and consulting for hedge funds, venture capital funds and private equity funds.

The creation of these groups is the next step in the evolution of Weaver's tax practice, and the new structure provides more opportunities for everyone. It allows the firm to maximize services to its current and future clients by delivering more strategic tax consulting, in addition to compliance services, and provides more opportunities for tax team members to pursue tax specialties if they desire.



**Clint Siddons, CPA**

***Partner-in-Charge, North Texas Business Tax Services***

Siddons, who offices in Fort Worth, began his career with Weaver, joining in 1994 as a staff accountant and being named partner in 2005. He previously served as the chief operating officer of Weaver's tax and strategic business services practice. Siddons is responsible for developing the firm's North Texas growth strategy and infrastructure for the tax practice, as well as relationship development on key accounts. Additionally, he provides consulting services for clients in the construction and investment fund sectors, providing strategic solutions as well as valuable industry and technical insights. Siddons is an active local member of the American Institute of Certified Public Accountants (AICPA) and the Texas Society of Certified Public Accountants (TSCPA). He earned a Bachelor of Business Administration degree in accounting from Texas Tech University.



**Robert Henry, CPA**

***Partner-in-Charge, South Texas Business Tax Services***

In 2012, Henry joined Weaver as a partner in the San Antonio office, leading tax and strategic business services in the Central Texas region. He has more than 17 years of experience in public accounting, assisting large and mid-size companies — particularly those in the technology, oil and gas and manufacturing industries — with income tax compliance, implementation of complex tax planning strategies and representation before the Internal Revenue Service. Henry specializes in income tax issues associated with inventory valuation and the research and development tax credit. A frequent, sought-after speaker, he provides valuable industry and technical insights to various professional audiences across the country. Henry is an active local member of the AICPA and the TSCPA. He earned bachelor's and master's degrees in accounting from Trinity University.



**Lisa Head, CPA**

***Partner-in-Charge, Investment Fund Tax Services***

Head, who offices in Dallas and serves clients nationwide, joined Weaver in 2013 as a senior manager and was named partner in 2014. She has more than 19 years of experience in financial reporting, auditing and tax preparation and analysis, including in-depth experience in public accounting. She focuses primarily on the unique and challenging taxation requirements of entities in the alternative investment industry, including domestic and offshore hedge funds, master feeder structures and funds of funds. Head has significant experience in the tax implications associated with long and short

equities, fixed-income securities, master limited partnerships, commodities, swaps and other derivatives. She combines diverse experience in tax compliance and consulting with experience in wealth advisory and family office operations. Head is an active member of the TSCPA, the Texas Hedge Fund Association and Texas Wall Street Women. She graduated with a Master of Science degree in taxation and a Bachelor of Arts degree in political science from the University of Texas at Arlington.



**Elizabeth Bunk, CPA, CFP®**

***Partner-in-Charge, South Texas Private Client Services***

Bunk joined Weaver as a partner in 2007 as part of the firm's expansion into Houston and merger with McDonald, Fox and Lund, P.C. She has more than 25 years of experience in public accounting, with focuses on serving companies in the construction, real estate and professional services industries. She also has extensive experience providing estate planning and income tax planning for high-net-worth individuals and their families, as well as tax compliance and consulting for businesses and their owners. With Bunk's years of experience, she remains on the forefront of important industry insights and regulation changes in the estate planning area. In addition, she has authored numerous articles for professional and business publications. She graduated with a Master of Taxation degree and a Bachelor of Business Administration degree in accounting from Baylor University.



**Justin Reeves, CPA**

***Partner-in-Charge, North Texas Private Client Services***

Reeves, who offices in Dallas, began his career at Weaver as an intern and was named a partner in 2015. He has 12 years of experience in public accounting, focused on providing tax compliance, planning and consulting services to estates and trusts, high-net-worth individuals along with their businesses and families, private foundations, S Corporations and partnerships. He also provides litigation support in executor liability and estate disputes and has experience preparing court-ordered and client-requested fiduciary accounting. Reeves is an active member of the Dallas Estate Planning Council, the AICPA, and the TSCPA. He graduated with a bachelor's degree in accounting and a master's degree in taxation, both from the University of North Texas.



**Sam Wren, CPA**

***Partner-in-Charge, Business Tax Quality and Risk Management***

Wren, began his career in Weaver's Fort Worth office in 1991 and was named partner in 2007. He has more than 25 years of experience in tax planning and compliance for partnerships, corporations and individuals, particularly in the real estate and energy industries. Previously the partner-in-charge of tax and strategic business services for Weaver's North Texas region, Wren was responsible for overall growth and strategy for the local tax department. As an active member of the Petroleum Accounting Society of Fort Worth, he remains on the forefront of industry and regulation changes. He is also a member of AICPA and TSCPA and holds several leadership roles with community and civic organizations. Wren earned a bachelor's degree in accounting from Texas Christian University.



**Laura Roman, CPA**

***Partner-in-Charge, Tax Education***

Roman, who offices in Midland, joined Weaver as a partner in 2010 upon the firm's merger with Elms, Faris & Company, LLP. She has more than 21 years of experience in public accounting. Roman focuses on serving clients in the oil and gas industry. She also has extensive tax and consulting experience in mergers and acquisitions, business transactional services, multi-state income tax planning and compliance, and accounting for income taxes and uncertain tax positions. She is an active local member of AICPA and TSCPA and serves on numerous local committees and community boards. Roman is a frequent author of articles for professional and business publications, providing valuable technical and industry insights. She earned a Bachelor of Business Administration degree in accounting from Baylor University.

**About Weaver**

Founded in 1950, Weaver currently has more than 650 employees and offices in nine cities across the United States. Weaver is ranked the largest independent accounting firm in the Southwest by *Accounting Today* magazine. The firm is also ranked the 38<sup>th</sup> largest firm in the United States and among the "2017 Best of the Best Accounting Firms" by *INSIDE Public Accounting*.

Weaver serves a broad range of clients including public and private national and international companies, nonprofit organizations and government entities. In addition to traditional assurance and tax services, Weaver also provides international tax, state and local tax, and wealth strategies services as well as risk management, financial advisory, IT advisory, energy compliance and consulting, and forensics and litigation support services. Learn more at [www.weaver.com](http://www.weaver.com).

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