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## **Weaver Promotes Seven Professionals to Partner**

HOUSTON, TEXAS (June 8, 2021) –Weaver, the 36th largest public accounting and advisory firm in the United States, is pleased to announce seven new partners, across five offices, as of June 1, 2021.

“Each of these professionals has demonstrated outstanding dedication and leadership to our clients and employees,” said Weaver CEO and Managing Partner, John Mackel, CPA. “They represent our different service lines and industry groups, and I am proud to welcome them into Weaver’s partnership. Their commitment to our firm is highly valued, and I know each one will be integral to Weaver’s continued success.”

In alphabetical order, Weaver’s new partners include:

**Sonia Desai, Austin, Texas**  
**Partner, Financial Advisory Services/ Forensics and Litigation**



Having joined Weaver in 2019 as part of the merger with HSSK, Sonia has more than 16 years of experience in valuation, litigation, investigations and audit. She serves as an expert witness in family law matters involving asset tracing and property division, as well as other valuation disputes. She also advises clients on the value of business interests for estate and gift tax planning, and mergers and acquisitions.

Sonia is a certified public accountant licensed in Texas and Illinois, a chartered professional accountant in Canada, an accredited senior appraiser, a chartered business valuator, and accredited in business valuation by the American Institute of Certified Public Accountants (AICPA). Sonia received her Bachelor of Science degree from the University of Toronto.

**Dallas Dugger, Dallas, Texas**  
**Partner, Audit Services**



Dallas began his career with Weaver and now has more than 11 years of experience auditing government and not-for-profit entities, including universities and colleges, independent school districts, large municipalities and private schools. His audit experience also covers a wide array of commercial

industries, including health care, manufacturing, technology, distribution and retail, as well as early staged companies and business combinations.

A certified public accountant, Dallas is an active member of the AICPA and the Texas Society of Certified Public Accountants (TXCPA). He holds a Bachelor of Science in Accounting from the University of North Texas.

**Kerri Franz, Houston, Texas**  
**Partner, Audit Services**



Kerri's more than 25 years of experience in public accounting provide her with extensive knowledge of accounting and technical reporting standards, as well as experience with financial audits, tax and accounting services. She has spent the last fifteen years exclusively practicing employee benefit plan audits for a variety of industries, including several Fortune 500/1000 companies that sponsor multiple plans with plan assets in excess of \$3 billion. For the past seven years, Kerri has helped lead Weaver's national employee benefit plan practice.

In addition to being a certified public accountant, Kerri holds memberships with the AICPA, the Houston chapter of the TXCPA, AICPA's Employee Benefit Plan Audit Quality Center, Southwest Benefits Association and Houston Compensation & Benefits, where she currently serves as a board member. She graduated cum laude with a Bachelor of Business Administration in accounting from St. Edward's University in Austin, Texas.

**Teresa Garza, Dallas, Texas**  
**Partner, Tax Services**



With more than 10 years of public accounting experience, Teresa focuses on tax planning and compliance for partnerships, corporations and S corporations in the upstream and midstream energy markets. She also serves clients in private equity, manufacturing, distribution, retail and professional services. Teresa is highly skilled at delivering tax advice and consultation regarding complex tax matters including subchapter K, provision for income taxes, mergers and acquisitions, transactions, and entity formation, as well as international and multi-state filing requirements.

Teresa is an active member of the AICPA, the Dallas Chapter of the TXCPA, Independent Petroleum Association of America and Young Professionals in Energy. In addition, Teresa holds several leadership roles within energy-related professional organizations. She currently serves on the board of directors for the Council of Petroleum Accountants Societies, the Texas Energy Council and the Women's Energy Network. She previously served on the boards of the Fort Worth Petroleum Accountants Society and Women's Finance Exchange.

Teresa is a certified public accountant licensed in the states of Texas, Kansas and Missouri. She holds a Bachelor of Science in accounting and a Master of Science in taxation, both from the University of North Texas.

**Aaron Grisz, Ft. Worth, Texas**  
**Partner, Tax Services**



Aaron has more than 10 years of public accounting experience providing proactive tax consulting and planning services to businesses across multiple industries with a concentration in real estate, as well as manufacturing and distribution. He focuses on complex real estate transactions, flow-through entity taxation, corporate taxation and ASC 740.

Aaron is a certified public accountant and a member of the AICPA and the TXCPA. He is an alumni of Texas Christian University where he earned a Master of Accountancy and a Bachelor of Business Administration.

**Jordan Phelps, Dallas, Texas**  
**Partner and Chief Financial Officer**



Jordan has more than 17 years of diverse experience, including both public accounting and internal financial leadership for fast-growth private equity-backed portfolio companies. As CFO, Jordan leads Weaver's internal financial planning, management and reporting with the goal of maximizing efficiency and minimizing risk.

Jordan holds a Bachelor of Business Administration and a Master of Accountancy from the University of Texas at Austin.

**Brandon Tanous, Houston, Texas**  
**Partner, Risk Advisory Services**



Brandon has more than 14 years of experience in internal auditing, compliance, business process consulting and risk management, including eight years of state government and hospital industry experience and six years in Weaver's Risk Advisory Services practice. Brandon focuses on government, higher education, not-for-profit and health care clients nationally.

Brandon holds numerous industry certifications, including certified internal auditor, certified fraud examiner and certified government accounting professional. He also holds a certification in risk management assurance. He earned a Master of Public Administration and Bachelor of Public Administration, both from Texas State University.

## **About Weaver**

Weaver has built a nationwide presence on an unwavering commitment to its clients' success, acting with integrity and always striving to transcend expectations. The Houston-based firm has grown to be the 36<sup>th</sup> largest public accounting firm in the United States, according to *INSIDE Public Accounting*; it is also ranked the largest independent accounting firm based in the Southwest by *Accounting Today* magazine.

From Fortune 500 multinational companies to start-ups, Weaver's clients include commercial, government and not-for-profit organizations. The firm is particularly well-known in financial services, energy, manufacturing and distribution, construction, technology, real estate, health care and government. Weaver's services go beyond traditional assurance and tax services to include risk advisory, IT advisory, energy compliance and consulting, forensics and litigation services, transaction advisory, valuation, CFO advisory, and specialty tax services such as international tax, state and local tax and private client services. Learn more at [www.weaver.com](http://www.weaver.com).