

Heather Hafeman, CPA Partner



Heather Hafeman. Heather is a CPA and earned her bachelor's of business administration degree in accounting from the University of Wisconsin – LaCrosse. She is currently working on obtaining her Fellow Life Management Institute designation through LOMA.

Heather has 14 years of experience in public accounting, primarily serving insurance entities. She has a variety of responsibilities, including managing audit, compilation, and tax engagements; presenting to Board of Directors/Trustees, and Audit Committees; and researching accounting and tax issues. Heather also manages our annual and quarterly statement engagements, and oversees our investment accounting function.

Heather consults with clients on various accounting issues, internal control reviews, and regulatory compliance matters. Heather has been with the Firm since its inception.

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