

Welcome to the Fall edition of our Inside Swenson newsletter. We are pleased to provide you with the latest news and update you on some of the exciting happenings at Swenson.

INTEGRA INTERNATIONAL'S 2022 GLOBAL CONFERENCE IN LONDON

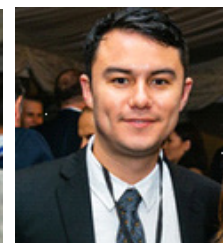
INTEGRA  **INTERNATIONAL**[®]
YOUR GLOBAL ADVANTAGE



Integra International's[®] Global Conference took place October 20-22, 2022 at the Leonardo Royal Hotel London St. Paul's. It was Integra's first Global Conference in three years because of the worldwide COVID-19 pandemic's preventing these events. **It was a significant honor and pleasure for our two attendees, Jim LoPresti and Ramon Valdivia, to represent Swenson Advisors.** They learned about the worldwide expansion of Integra, with new member presentations by firms located in Morocco, Singapore, Manchester (UK), Uganda and Washington D.C. With over 135 member firms in 78 countries and 7,000 people strong, Integra is one of the fastest growing CPA alliances in the world.



Jim LoPresti



Ramon Valdivia



Representing EBS and Accepting the Award for Integra's Firm of the Year (from left to right): Oleana Levshun, Sr. Partner; Julia Shchurovskaya, Partner, Head of Management Consulting; Nataliya Sarguns, Sr. Partner; Helen Volska, Managing Partner; and Roby Almog, Global Chairman of Integra

What was truly heartwarming and deserving of our praise was the Award for Integra's Firm of the Year. Swenson Advisors was Integra's Firm of the Year in 2019, and this year's award was given to EBS, our member firm in Ukraine that we have had a very special relationship with since the

INTEGRA INTERNATIONAL'S 2022 GLOBAL CONFERENCE IN LONDON (cont.)

war started. EBS's Julia Shchurovska provides Senior Audit Manager services for Swenson Advisors.

The 250-person EBS firm is headquartered in Kyiv and has been able to sustain its presence and continue operations while many of its employees have been displaced. Swenson Advisors took the initiative and forged a mutually beneficial relationship with EBS to supplement our audit, tax and lease consulting practice and support this firm and its very business existence by outsourcing work to a very capable team of EBS employees.



Dinner at the House of Commons

There were social events for the conference attendees as well as for their families and guests. While Jim and Ramon were attending the conference sessions during the day, spouses and guests were treated to an all-day tour to Windsor Castle. The next day's activities included a walking tour of the city and a visit to St. Paul's Cathedral. A special treat was a fabulous dinner at the Westminster Palace House of Commons dining room followed the next evening by a river cruise down the Thames to Greenwich for sightseeing and dinner.

Lastly, as in every conference, the big "reveal" is where next year's Global Conference will be held . . . and that is Singapore in October of 2023. Other regional conferences on the agenda for 2023 include Dallas in May and Zurich in June, as well as a one-day Cross-Border Tax Workshop in Berlin in September 2023.



Ramon Valdivia and his Fiancée Denisse Exploring the Sights of London

NEW COMMUNITY OUTREACH



San Diego County Taxpayers Association (SDCTA) is a nonpartisan association of individuals, businesses, and organizations who promote effective and efficient government on behalf of all San Diego County taxpayers. SDCTA engages civic leadership as well as the public to develop and promote well researched policy solutions.

Steve Austin, Managing Partner of Swenson Advisors, is assisting this organization with the establishment of standards to apply and measure for defined performance metrics used to assess the efficiency as to the use of monetary and non-monetary resources utilized to resolve the homelessness crisis in San Diego. Stay tuned for updates as this important project evolves.

SUPPORTING THE INTERNATIONAL BIPOLAR FOUNDATION'S STARRY NIGHT EVENT

Swenson Advisors was proud to be a supporter of the International Bipolar Foundation's Starry Night Event on September 24, 2022. The Gala was held at the Ultimate Sky Box at the Diamond View Tower in San Diego and celebrated the Foundation's 15th year of service. The Foundation's focus is on mental health awareness and, in addition to education, resources, and supportive connection for all who are touched by bipolar disorder, it also recognizes and honors the remarkable contributions that those living with bipolar disorder offer. IBPF envisions wellness, dignity and respect for people living with bipolar disorder and a world free of mental health stigma.



The evening's featured speaker was Gregg F. Martin, PhD, a 36-year Army combat veteran and retired Two-Star General, who shared the story of his battle with bipolar. General Martin holds degrees from West Point and MIT and has led organizations ranging from a platoon of 30 soldiers to a major base of 30K military and civilians. During the Iraq War in 2003, General Martin commanded a combat engineer brigade, and the intense stress of combat triggered his genetic predisposition for bipolar and sent him into his first episode. For the next decade, swings of mania and depression continued, going undetected, undiagnosed, and unknown by him or anyone around him. It wasn't until 2014, during an acute manic episode, that he was removed from his role as President at the National Defense University and began receiving help. With treatment, support, and connections, General Martin has found a new mission in combatting mental health stigma to save lives. Now retired, he has become an ardent mental health advocate and is writing a book on his experiences: "Bipolar General: my forever war with mental illness."

SUPPORTING THE INTERNATIONAL BIPOLAR FOUNDATION'S STARRY NIGHT EVENT (cont.)

Swenson Advisors' attendees were Jim LoPresti, Ramon Valdivia and Jennifer Brotten. They, along with their guests, Katherine Loveless, Win Engelbert, CEO and Founder of First Bridge Solution, and Yelena Bekkerman, enjoyed sampling the delicious offerings at the buffet stations and entertainment by the Bill Magee Blues Band. It was a wonderful and inspiring evening.

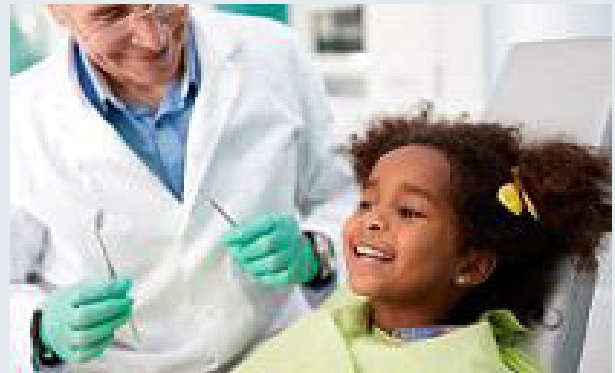


WELCOMING OUR NEW LEASE ACCOUNTING CLIENTS

CC AMULET MANAGEMENT



CC AMULET MANAGEMENT, LLC and subsidiaries provide Dental Service Organization (DSO) administrative services, consulting, and management services to entities not owned by the Company in California and Nevada, including Children's Choice Dental Care. The Company also provides pediatric dentistry and orthodontic services in Arizona and New Mexico.



With private equity ownership, there has been significant growth over the past several years through acquisitions including three key acquisitions in 2021 expanding operations in Arizona, Nevada, and New Mexico. This growth is expected to continue with expansion into additional western states.

Operations in California include Children's Choice Dental Care which has been providing a full range of pediatric dental and orthodontic services since its founding in 2005 by a board-certified pediatric specialist. Children's Choice Dental Care has a vision of providing access to quality care to children throughout California and strives for patients to be cavity-free.

WELCOMING OUR NEW LEASE ACCOUNTING CLIENTS (cont.)



WHITMAN, REQUARDT & ASSOCIATES, LLP (WRA) is a nationally recognized engineering, architectural, construction management, and environmental firm headquartered in Baltimore, MD, with national locations in 11 states and the District of Columbia. With a history dating back to over 100 years, WRA has consistently ranked as a top 125 Engineering News Record firm in the country with over 650 employees and at least 3,000 projects in development at any given time.

Founded in 1915, with its focus on water and wastewater, the firm evolved into a multi-faceted engineering company capable of meeting the demands of a rapidly evolving society in both public and private sectors. WRA focuses primarily on projects in transportation, building design, water/wastewater, environmental, marine, land development and construction management. WRA has been instrumental in improving society's quality of life with cleaner water; improved roads, bridges and railroads; state-of-the-art buildings for federal, state, local and DOD facilities; modern and improved ship building and marine facilities.

WELCOMING OUR NEW LEASE ACCOUNTING CLIENTS (cont.)



Vision: “A World Where Everyone Has the Opportunity For a Healthy Life.”



MANAGEMENT SCIENCES FOR HEALTH (MSH) is a global nonprofit organization that provides governments, health organizations, and the private sector with strategies, tools, and management support to build strong, resilient, sustainable and high-functioning health systems.

MSH works with countries and communities to save lives and improve the health of the world's poorest and most vulnerable people. With a staff of over 1,500 people and by partnering with many international and local organizations, MSH has improved health systems in more than 150 countries worldwide since its founding in 1971.

The work of MSH includes pandemic prevention, preparedness, and response; health financing; access to medicines; supply chain management; maternal and child health; tuberculosis, malaria, HIV and AIDS; public health leadership; vaccines; and more. It seeks to achieve universal health coverage – equitable, affordable to high-quality health services for all who need them – even in fragile, post crisis settings.

CONNECT'S SOCIAL VENTURE SUMMIT



CONNECT, headquartered in San Diego, provides innovators and entrepreneurs access to investors, mentors and education.

This year's **Connect-sponsored SoCal Venture Summit** was held on September 29th at San Diego's Omni Hotel. It was attended by 120 venture capitalists, 90 being from out of town. A feature of the event was a two-hour session where the VCs were able to connect with 26 pre-venture companies. Following that session, the group moved on to Petco Park, where they were able to meet with 30 post-venture local CEOs.

Prior to the event, **Connect's CEO Mike Krenn** stated: "We take a long-term view. We want the VCs to come down and see high-quality, interesting companies." He added that the goal of the event is "not necessarily about funding deals on the spot but rather leaving an overall impression on the VCs. They see quality, and they know something is going on in San Diego. It's a long-term play. When they're comfortable with the market, that's when they start writing checks."



Mike Krenn, Connect CEO

Mike Krenn was interviewed by Jeff Clemetson, whose article appeared in the **San Diego Business Journal**. In a Q&A session, Mike shared his optimistic outlook concerning the state of venture capital for San Diego's innovation ecosystem and its future potential. In answer to "What's next for San Diego?" he said:

"I like to think of Connect and our ecosystem as a startup with an authentic purpose. Many startup companies get going, do very well and then plateau. We need to continue to scale, thoughtfully – not simply for the purpose of growth but instead to create the next great inclusive ecosystem.

When people think of the most innovative regions in the country, they inevitably mention Silicon Valley and Boston. It's because those regions do both life sciences and tech. San Diego is in the pole position for greatness. We have a unique opportunity to build something truly special that benefits all of San Diego well into the future. We just have to be thoughtful about how we go about achieving it and to do it – together."

Swenson Advisors has been providing audit and tax services to Connect for more than a decade.

SWENSON FRIENDS AND FAMILY ROOTING FOR THE PADRES

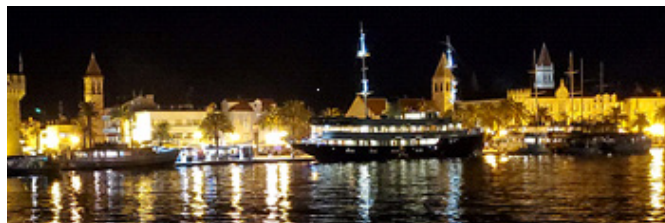


Cheering for the Padres at Petco Park is an annual event for Swenson Advisors. This year the Swenson team, friends and family were in attendance as the Padres competed against the Chicago White Sox and subsequently made the playoffs for the first time in a full season since 2006. It was a great afternoon, and although our Padres did not make it to the 2022 World Series, we'll be rooting for them next season. **They did put the LA Dodgers in their place!**

SAILING WITH JIM IN CROATIA



Jim LoPresti has been doing quite a bit of traveling lately, both for business and vacation. In September, Jim and his wife, Barbara visited family in Germany and went on a sailing adventure in Croatia. A total of nine chartered a 46-foot catamaran and sailed for ten days around the Kornati Islands off the coast of Croatia with many stops along the way.



UPDATE ON THE CHICKS



We know that you've been anxiously waiting to know how the chicks are doing. Seriously, our readers have been following the progress Anastasia and Raul Gonzalez, Steve and Gail Austin's grandchildren, have made in raising their adopted chickens. We've had comments, questions, encouragement and advice as well as our followers sharing their own experiences in growing happy, healthy chicks. We have clients who really care about the chickens. The CFO for one of our long-time clients gave us a good supply of nutritious oyster shells, and we learned that oyster shells are an excellent source of calcium which laying hens need to produce quality eggs.



Message from the chicks: "Thanks to all."



FOUNDATION UPDATE

SWENSON
**Children's
Foundation**



***Building Faith.
Changing Lives.***



The Swenson Children's Foundation is excited to be preparing for the 7th year of its Holiday Outreach. The Foundation will be working with the Swenson Team and in collaboration with the East County Transitional Living Center to prepare gifts as well as daily essentials for children and families in the local community who are in need. Its mission this Christmas season is to bring happiness and peace to children of all ages.

Sarah Frohman, Executive Director of the Foundation thanks everyone who supports the work of the Foundation, asks that you look for its Holiday e-blasts and to receiving updates in your mail box and wishes you God's blessings.