

# DIRECTORY OF OREGON LOCAL GOVERNMENT FINANCE CONSULTANTS

updated April 2024

This directory is intended to list individuals and firms that provide finance and accounting consultation and contracted support services for local government agencies in Oregon. The consultants listed are self-nominated; the only requirement for inclusion is a consultant's submission of a completed information form.

**IMPORTANT DISCLOSURES** are included at the end of this document.

Firm Name & Location	Contact Info	CPA	Other Certifications	Region(s) Served	Services
Summer Sears CPA, LLC Bend, Oregon	Summer Sears, CPA (541) 350-2056 summer@searscpa.com www.summersearscpa.com	Yes		- Portland Metro - Willamette Valley & N. Coast - Southwestern Oregon - Central Oregon - Eastern Oregon	- Interim Support - Audit Support - Budget Support - Accounting/Bookkeeping - Financial Recovery - Financial Report Preparation
Perfectly Balanced Consulting, LLC Oregon City, Oregon	Nancy Wilson (503) 956-9504 prfectlybalancedconsultingllc@gmail.com	No		- Portland Metro - Willamette Valley & N. Coast - Southwestern Oregon - Central Oregon - Eastern Oregon	- Interim Support - Audit Support - Internal Control/Process Improvement - Accounting/Bookkeeping - Agreed-Upon Procedures - Treasury Support - Investment Support
Sensiba LLP Bend, Oregon	Brenda Bartlett, CPA/Partner (541) 388-7888 bbartlett@sensiba.com Sensiba.com	Yes		- Portland Metro - Willamette Valley & N. Coast - Southwestern Oregon - Central Oregon - Eastern Oregon	- Internal Control/Process Improvement - Accounting/Bookkeeping - Agreed-Upon Procedures - FS prep (limited to engagement accompanying AUP)
Wolfe Consulting, LLC dba Wolfe Advisors Oregon City, Oregon	Christa Wolfe, Partner (503) 631-9200 christa@wcportland.com www.wolfeadvisors.com	Yes		- Portland Metro - Willamette Valley & N. Coast - Southwestern Oregon - Central Oregon - Eastern Oregon	- Interim Support - Audit Support - Budget Support - Internal Control/Process Improvement - Accounting/Bookkeeping - Tax Form Preparation

# DIRECTORY OF OREGON LOCAL GOVERNMENT FINANCE CONSULTANTS

updated April 2024

This directory is intended to list individuals and firms that provide finance and accounting consultation and contracted support services for local government agencies in Oregon. The consultants listed are self-nominated; the only requirement for inclusion is a consultant's submission of a completed information form.

**IMPORTANT DISCLOSURES** are included at the end of this document.

Firm Name & Location	Contact Info	CPA	Other Certifications	Region(s) Served	Services
Eric Kytola, CPA Eugene, Oregon	Eric Kytola, Owner (541) 554-3125 eric.kytola@gmail.com	Yes		- Portland Metro - Willamette Valley & N. Coast - Southwestern Oregon - Central Oregon - Eastern Oregon	- Interim Support - Audit Support - Budget Support - Internal Control/Process Improvement - Accounting/Bookkeeping
Merina+Co Tualatin, Oregon	Tonya Moffitt, Managing Partner (503) 723-0300 tmoffitt@merina.com <a href="https://www.merina.com/">https://www.merina.com/</a>	Yes	Team Members Certifications - Certified Fraud Examiner, Certified Internal Auditor, Certificate in Business Analysis, Project Management Professional, Licensed Professional Engineer, Six Sigma Green Belt, Advanced SQL for Data Scientists, Oregon Municipal Auditor	- Portland Metro - Willamette Valley & N. Coast - Southwestern Oregon - Central Oregon - Eastern Oregon	- Interim Support - Audit Support - Budget Support - Internal Control/Process Improvement - Accounting/Bookkeeping - Risk Assessment - Organizational Performance - Cost Allocation - Transient Lodging Tax Monitoring - Solid Waste and Recycling Rate Review

# DIRECTORY OF OREGON

## LOCAL GOVERNMENT FINANCE CONSULTANTS

updated April 2024

This directory is intended to list individuals and firms that provide finance and accounting consultation and contracted support services for local government agencies in Oregon. The consultants listed are self-nominated; the only requirement for inclusion is a consultant's submission of a completed information form.

**IMPORTANT DISCLOSURES** are included at the end of this document.

Firm Name & Location	Contact Info	CPA	Other Certifications	Region(s) Served	Services
Straight Up Bookkeeping, LLC Holcombe, WI	Veronica Smyth, Owner (541) 280-3015 veronica@straightupbkkp.com www.straightupbkkp.com	No	QuickBooks Pro Advisor	- Portland Metro - Willamette Valley & N. Coast - Southwestern Oregon - Central Oregon - Eastern Oregon	- Interim Support - Audit Support - Budget Support - Accounting/Bookkeeping - Specialize in QuickBooks software

**IMPORTANT:** Inclusion in this Directory does not represent an endorsement, recommendation, evaluation, or assumption of responsibility for the quality of work of any listed consultant. There is no representation implicit or implied that any work product produced by those listed will meet federal or state requirements. There is no representation implicit or implied that the information provided by the consultant is accurate - it is made available as provided. Users of the Directory should perform adequate due diligence as part of their own investigation and judgment regarding the reputation, cost, and quality of any particular firm.

Consultants listed may or may not perform audit-related services. For a complete list of Licensed Municipal Auditors in Oregon, please refer to the Oregon Board of Accountancy's website: <https://www.oregon.gov/BOA/Pages/Municipal-Auditors.aspx>