

# A LEGACY IN PROGRESSIVE LEADERSHIP

## The Future of WCS is Now

BY KRISTI S. HALFORD  
PHOTOS BY PETER HOWARD

Modern, contemporary workspaces that foster collaboration. Advanced technology solutions. Flexible. Agile. This is not a new tech firm. This is the future of accounting.

WCS is taking the lead in the accounting industry, serving as a model for how to create a progressive, inclusive and forward-thinking accounting and advisory practice. In addition to a new location and a branding overhaul, WCS has created a new management structure to replace the traditional Managing Partner role found at most accounting firms.

A culture shift in the accounting industry is slow as legacy leaders – mostly male – struggle to release the power and control of the managing partner role.

“We really are different than other firms our size. By eliminating the old structure of most firms with one person leading, we are giving a voice to staff throughout the practice,” shares Angeline White, a partner in the firm and a member of the newly-formed executive committee, “We’re ahead of many of our industry peers in setting succession standards, procedures and new retirement goals keeping aspiring staff in mind.”

WCS’s newly  
formed executive  
committee



**David A. Crisp**  
Partner



**Jeffrey A. Jacobson**  
Partner



**Blake P. Ulam**  
Partner/COO



**Angeline S. White**  
Partner



**Frank G. Savarese**  
Partner



Frank Savarese, the current Managing Partner, will transition to serve as a member of the new executive committee, formed by five partners including White. Other members of the executive committee include the firm's COO, Blake Ulam, and partners David Crisp and Jeffrey Jacobson.

"I feel fortunate to lead the second generation of WCS and for the opportunity to transfer leadership to a young talented team that represents the firm's third generation. Transitioning leadership and day-to-day operations to an executive committee of partners provides me more opportunity to focus on growing the practice," states Savarese.

According to Savarese, WCS will continue to live by the founders' philosophy to provide clients "close personal attention" in the services rendered, while evolving to a new brand vision to "inspire your corner of the world" by serving as partners with clients, providing expertise in their industry.

During its 40-year history, the firm has expanded its range of services beyond the traditional tax, accounting and consulting services to include niche groups that specialize in investigative accounting, valuations, non-profit organizations, construction and real-estate, governmental, employee benefit plans and health care practices.

Today, the firm offers business advisory, and merger & acquisition services to support company owners and leaders as they develop entity/owner structure, transition plans, and operations including staffing and benefits, to help clients not only measure their past, but shape a better future.

"In the 20 years I have been part of the firm, since my time as an intern, we have expanded our product offerings and services. This has been important for slower times of the year to keep the team motivated and inspired," says David Crisp, Partner and a member of the executive committee.

Crisp, along with Blake Ulam, the firm's COO and a member of the executive committee, built their careers at WCS beginning with their time as interns.

"Through my 20 years at the firm, I have watched it grow and transform while retaining its founding principles of excellent customer service, technological expertise and a trusting, supportive family culture. That is a testament to our founding partners and Frank," states Ulam.

At WCS, employee growth and engagement is important. Employees aren't just a number, relegated to sitting in a cubicle, with monotonous day-to-day number crunching. Young team members see upward mobility – a career track for themselves at WCS.

"Our new brand and progressive leadership style will help us attract the talent needed to take WCS and our clients to the next level," shares Savarese.

"We've taken what the founders built over the past 40 years and determined how to reflect internally on our staff the founder's vision of close personal attention offered to our clients," adds Crisp.

Onboarding new employees is a big deal. The firm, recognizing that everyone learns differently, provides robust training and individualized personal development.

WCS does not support a cut-throat environment where associates, managers and directors hold information close and battle over clients. Everyone shares knowledge and works collaboratively – no one person holds the key to all the knowledge.

"Our clients like knowing that we work together in a team

environment and that the knowledge of their account or the expertise they need doesn't reside with one person. In any situation the client can be serviced. It's not about any one of us taking credit – we work for the betterment of the client," shares White.

During the COVID pandemic, WCS was able to quickly pivot to telework because of its agile operations. The firm was ahead of its peers in the adoption of technology including going paperless and using the cloud.

"The tech changes I have experienced since I started as an intern have been incredible. It's like when NASA claims when they landed on the moon, they did so with equipment slower than today's smart phone," says Ulam with a laugh.

The partners all agree that with the new branding and leadership structure, nothing else is really changing at WCS.

Though WCS once had a hierarchal, top-down leadership structure, succession planning was not foreign to the founders. The firm has been under Savarese's leadership for the past 15 years. He recognized that the world and the profession was changing, and embraced new services and attracted new talent.

"All of us on the executive committee grew up under Frank's mentorship. We look to continue his forward-thinking approach and that of the founders before him. I am not the first woman to be named partner. The founders were inclusive of women as partners before that was a trend," shares White.

For other firms, succession planning may be top of mind but when it comes to execution, they are slow to proceed.

Jeffrey Jacobson, Partner and a member of the executive committee who perhaps has the most diverse background at the firm, as a CPA and attorney who has worked for the IRS and in roles for private firms as CFO and General Counsel, enjoys the opportunity to think years ahead and to strategically position an organization for its future. However, he can attest to the hesitation, especially for legacy organizations, to implement a succession plan.

"Our executive committee at WCS is comprised of diverse backgrounds. We have the opportunity to differentiate ourselves, and continue the success and reputation of the firm for the fourth generation, states Jacobson, "Transitions can be challenging, but I am excited to work on the planning for the future of this firm."

As WCS looks to its future and transition to a third generation of leadership, the changes are viewed by many as simply an evolution of an already progressive company, that has been ahead of its peers since its founding 40 years ago.

According to Ulam, "We're not changing who we are. We've always been a firm that embraces succession. This evolution is to be expected. Staff, managers. They expect this is how the process works. Some day down the road, it will be their turn."

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**WCS is headquartered in Hunt Valley,  
with offices in Bel Air and Elkton.**

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