



*“When I first moved to Texas many years ago, I found myself starting from scratch. That’s when I experienced, first-hand, the importance of strong, meaningful relationships. I feel privileged to serve the committees I am involved with and helping others to achieve success.”*

## **Meresa S. Morgan, CPA**

### ***Audit Shareholder and Audit Department Chair***

Meresa Morgan believes that maintaining strong professional relationships plays a critical role in her success.

She credits her expansive network with her ability to provide value to her clients - which Meresa provides throughout the year as her clients regularly seek her advice on various transactions and financial initiatives. She truly thrives on the success of her clients and believes that is the reason for their extreme loyalty and glowing recommendations. “If I am asked a question that I can’t answer, I will find the right provider who can,” Meresa says. Her connections within the business community allow her to make appropriate introductions that make a real difference.

- Oversees the audits of over 100 employee benefit plans, in addition to providing financial audit services to middle-market and privately held companies in the Houston area
- Introduced a software development client to a property and casualty insurance provider which saved them \$60,000 a year
- Tapped her strong relationship with a financial institution to arrange for a client to provide a review, instead of an audit – which saved her client money

Meresa also specializes in employee benefit audits which represents an important niche specialty for the firm and oversees the firm’s efforts in keeping these clients abreast of the latest issues regarding DOL compliance.

A staunch supporter of women in business, she serves on the Board and is President of the Women’s Finance Exchange. She is also actively involved in The Entrepreneurship Institute, which serves the small to middle market entrepreneurial privately-held companies in the Houston area.

Meresa serves on BKR International’s Employee Benefit Plan Auditing Committee and its Emerging Leader’s Committee. She is a member of the American Institute of Certified Public Accountants and is the firm representative of the Employee Benefit Plan Audit Quality Center. She is also a member of the Lone Star Council of the American Society of Pension Actuaries and the ERISA Industry Group of Houston. As a member of the Texas Society of Certified Public Accountants, she is involved with its Houston Chapter.

Meresa earned a B.S.B.A. in Accounting from Auburn University and enjoys traveling, family gatherings and relaxing with her husband on their farm in South Mississippi.

