

## Herbein and Chagrin Falls, Ohio Based WAI to Join Forces, Bringing Clients Access to Organizational Psychology Services

Herbein + Company, Inc. (Herbein), a leading CPA advisory firm, recently announced it has merged in the Chagrin Falls, Ohio based organizational psychology firm Watterson & Associates, Inc. (WAI). The transaction is effective as of October 1, 2022.

Founded in 1996, WAI strategically partners with companies to manage employee development needs. Organizations turn to WAI for expert advice on making strong hiring decisions, sustaining employee development, and ultimately, realizing a long-term return on investment. This develops sound succession planning with management and leadership growth processes.

As part of Herbein, WAI will initially operate as a Herbein division called Herbein | Watterson Talent Solutions. In January 2024, the division will operate as Herbein Talent Solutions.

WAI is led by Dr. Gary Kustis, a nationally recognized expert in organizational psychology and business, and the team's operations vice president Kristin Smith. Kustis and Smith will join Herbein | Watterson Talent Solutions as partners. They collaborate with a team of freelance consultants, and are supported by founder Dr. David Watterson, who will remain as an advisory consultant. Internationally

recognized for its expertise in pre-placement evaluation, on-boarding and development, WAI provides personalized coaching, and candidate assessment and training using both industry-wide and proprietary tools and interviewing techniques.

Celebrating its 50th year in business in 2022, Herbein has a strong plan for continued success, which includes organic growth, and an accelerated pace of mergers and acquisitions. "We're excited to be joining Herbein as it reaches this milestone of a half-century of business success. With Herbein's vision and the foundation laid by Dr. Dave Watterson, we're ready to get started on the next 50 years," said Gary Kustis.

Herbein + Company, Inc. (Herbein) is a leading Mid-Atlantic CPA advisory firm whose professionals specialize in creating impact for clients, helping them succeed with confidence today and tomorrow. With offices in Pennsylvania, New Jersey and the Philippines, Herbein is an independent member of Allinial Global, an accounting firm association of legally independent accounting and consulting firms with offices in North America and throughout the world. Visit [www.herbein.com](http://www.herbein.com) or connect with us on LinkedIn, Facebook, and Twitter.

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David Morrison

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- ✓ When people become eligible for Medicare, they are often confused about what coverages they are eligible for, and what their options are.
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- ✓ Whether it is a Medicare Advantage Plan, a Medicare Supplement Plan and/or a Prescription Drug Plan, at Medicare Education Services, we want you to Know Your Choices.



#### MEDICARE ENROLLMENT

If you're turning 65 soon, it's time to think about what Medicare plan is right for you.

If you are already enrolled but would like to review your options, we can help with that too!

#### MEDICARE ADVANTAGE

When you want a little extra coverage - like dental, vision, and hearing care - a Medicare Advantage plan might be right for you.

Contact Us to find out if it would be to your advantage to have a Medicare Advantage plan!

#### MEDICARE SUPPLEMENTS

Original Medicare pays for many healthcare services, but they do not cover everything.

A Medicare Supplement (AKA "Medigap") plan can help to cover the things that original Medicare does not.

#### MEDICARE PART D

Even if you don't currently take prescription drugs, it is our recommendation that everyone enroll in a plan.

Like Part B, a PDP comes with a late enrollment penalty, which you would be required to pay for the rest of your life.

*Contact us today to schedule a FREE, No-Obligation Consultation!*

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