

## FINANCE

# Five to watch in finance

They are more than just number crunchers and pencil pushers. They're strategic thinkers and trusted advisers. They have a passion for their work, their clients and the Northeast Ohio community. Here are five of the region's financial professionals we think are worth watching. Know someone in finance, law, hospitality or any other industry who has a story worth telling in a future section? Let Sections Editor Timothy Magaw know at [tmagaw@crain.com](mailto:tmagaw@crain.com).



**Julia Dean**  
Assurance Senior  
Ernst & Young

**Description:** If you had asked Dean a decade ago whether she would have a career in finance, she would have said absolutely not. It took earning a degree in chemistry to realize she wasn't doing something she loved. After a nudge from one of her contacts, she went back to school to pursue a career in finance and ultimately earned certification as a CPA. Today, she's in auditing at Ernst & Young, where she works largely with public companies. "I am constantly being challenged," Dean said. "I absolutely love what I do." Dean has also served as a mentor with College Now Greater Cleveland — an organization that benefited her when she was younger. She recently got involved with Adoption Network Cleveland and hopes to do mentoring there. "It might be a small thing to do, but it allows you to make an impact in some way on a person's life," she said.



**Dan Leffler**  
Manager  
Sikich

**Description:** Leffler started his career with Deloitte doing international tax work, but he quickly realized his true passion was working alongside small businesses. "There's a lot more of a personal connection when you're working directly with the owner of the company," said Leffler, who joined BCG & Co. in Akron before it was acquired by Sikich. In particular, Leffler has carved out a niche in succession planning, mergers and acquisitions and valuations, especially in the manufacturing space. He has taken an interest in helping grow Sikich's succession planning practice given the looming onslaught of baby boomer retirements. "The most challenging aspect can be getting business owners to talk and think about succession planning," he said. "They've spent their whole lives building a career and don't always look toward the future."



**Marla Petti**  
Director of Financial Planning  
Services  
HW Financial Advisors

**Description:** The reason Petti likes her job is simple: She enjoys helping people. As a wealth adviser, Petti is passionate about involving women in their family finances. "Men and women have different relationships with money," Petti said. "It's best if they both play a role." For instance, Petti counsels women that if something major happens — like a divorce or death of a spouse — they should be prepared to take control of their financial lives. Petti works with clients on basically "anything you put a dollar sign in front of." "I love meeting new people and hearing new stories and being part of the solution," she said. Before joining HW, Petti spent the majority of her career working in an all-female financial firm and has a long involvement with philanthropic commitments that include working with women.



**Tony Constantine**  
Partner, Tax  
Ciuni & Panichi

**Description:** Constantine didn't grow up dreaming of becoming an accountant. It was his dream, after all, to run the metal processing and trucking company started by his grandfather. But while attending Cleveland State University — studying accounting, figuring it would help with eventually running the business — his family sold the company. He ultimately pivoted his career toward helping family businesses like the one he grew up admiring. "I don't know whether it's nostalgia or what, but I see a lot of myself in them — their entrepreneurial spirit," Constantine said about his clients. "They all have a unique story." Today, Constantine is the youngest partner at Ciuni & Panichi and leads its real estate and construction practice. Beyond the office, Constantine is on the Western Reserve Historical Society's board of directors.



**Jason Bogniard**  
Principal, Business Valuation  
Apple Growth Partners

**Description:** A trip to New York City when he was 10 or so had planted the idea that Bogniard might one day be trading stocks on the floor of the New York Stock Exchange. That idea didn't pan out, but Bogniard's interest in finance never faded. Today, he helps privately owned companies figure out the value of their businesses. "I never get sick of hearing that American story," Bogniard said. "A lot of people have sacrificed a lot in their lives to do that, but also reaped the reward of doing it." Bogniard has performed valuations and other analyses for a number of purposes including litigation support services involving shareholder disputes, asset tracing and domestic relations. His non-litigation work includes estate taxes, acquisitions, stock options and bankruptcy.