



FOR IMMEDIATE RELEASE

Contact:

Kelly Winkler
Alpha Dog Advertising
717.517.9944 x107
kwinkler@alphadogadv.com

Erin Cramer
Alpha Dog Advertising
717.517.9944 x102
ecramer@alphadogadv.com

Simon Lever Promotes Sara Bruton and Josh Shroyer to Partner

Partners Bruton and Shroyer exemplify Simon Lever's core purpose – to maximize the success of its people, clients, and community

LITITZ, PA – (February 7, 2020) – Simon Lever, a financial advantage firm located in Lititz, PA, announced today the promotion of Sara Bruton and Josh Shroyer to partner. Dedicated to maximizing the success of its employees to better serve its clients and community, Simon Lever continues to diversify its partner group base and elevate the talent that is bringing change to the firm.

Having joined Simon Lever in 2009, Sara Bruton, a Messiah College graduate, has been with Simon Lever since day one of her career. Fresh out of college, Bruton embraced the Simon Lever difference – that supporting the



employee meant maximizing the success of that employee and, in turn, their clients. Bruton started at Simon Lever as a staff accountant and, over ten years, rose through the ranks to partner. In addition to serving clients, she was instrumental in starting Simon Lever's first summer internship and externship programs and served as mentor to incoming young professionals. "I have always been drawn to the success of the individual," says Bruton. "I realize the vast importance of investing in our people,

discovering their strengths, and aligning those strengths with company needs, as their success directly correlates to the success of the clients we serve and the firm itself." Bruton now serves as the firm's operational team chair, providing clarity and support to the firm in coordination with other operational leaders.

-more-



Accolades go to Joshua Shroyer, who also made partner. Shroyer, a graduate of Penn State, started with the firm 13 years ago in 2007, immediately following graduation. Shroyer heads up the in-demand Advisory Services team at Simon Lever, which places emphasis on providing a financial advantage for Simon Lever clients. Shroyer echoes Bruton on all the reasons why he decided to go with the progressive Simon Lever Team: “We invest in and are committed to shaping our employees’ success,” says Shroyer. “By optimizing our employees’ individual strengths and supporting the growth of our teams, employee, client, and community all benefit.” Shroyer has a passion for providing value-added services to the firm’s clients in an effort to help them achieve their goals. These services are customized to the client’s needs, but often involve succession planning, estate tax considerations, cash flow analysis, management consulting, and business valuation, the last of which Shroyer has been accredited through the American Institute of Certified Public Accountants (AICPA).



“Having seen, firsthand, Sara and Josh develop their skill sets and passionately assist colleagues in their endeavors and challenges, their promotions to partner seemed the obvious next natural stepping stone,” says Jason McDougall, managing partner, Simon Lever. McDougall has the difficult task of leading Simon Lever through a period of significant growth, doubling in size in the past several years. “We are so proud to see our own rise through the ranks with such unwavering dedication to our growing company. They will serve as great role models to those looking to advance their own careers here at Simon Lever.”

With Baby Boomers moving on to retirement, Simon Lever is determined to head off the next-gen challenge of attracting and retaining young professionals looking to go into a rewarding career of financial services. Simon Lever wants to be that company that will play to the individual’s strengths and shepherd employees into their appropriate – and natural – roles as it relates to the organization’s needs. The team works closely with colleges throughout the year and has developed a program that allows students to explore Simon Lever as a career choice.

If interested in a career with Simon Lever, or if looking for a business advisory and CPA firm that aims to help its clients achieve a financial advantage, visit www.simonlever.com for more information.

-more-



About Simon Lever

Founded in 1951, Simon Lever is an independent, full-service business advisory and CPA firm whose core purpose is to maximize the success of those with whom they partner. Focusing on employee, client, and community, Simon Lever is dedicated to offering services above and beyond compliance that provide their clients with a financial advantage. A business looking to grow, streamline productivity, become more profitable, and garner assistance with navigating the complex world of taxes and compliance can turn to Simon Lever for Advice When It Matters Most. For more information, visit www.simonlever.com.