

Kristen Kelleher, CPA

AUDIT MEMBER

Kristen has worked in public accounting since 1992, and been with Dauby, O'Connor & Zaleski, LLC since 1996. Prior to joining Dauby O'Connor & Zaleski, LLC, she was with the national CPA firm of Coopers & Lybrand (which is now Pricewaterhouse Coopers) in their Indianapolis office where she focused on banking and hospital clients.

Kristen's duties include working with her clients to coordinate and execute all phases of the audit to ensure that all applicable deadlines are met and exceptional client service is provided. The coordination phase includes working with the client and the members to assess staffing needs, technical accounting needs, and other services needed.



Education

B.S., Indiana University - Bloomington

Professional Organizations

- Member, Indiana CPA Society
- Member, American Institute of Certified Public Accountants

Joined DOZ in 1996

Experience Highlights

Kristen not only staffs her jobs to ensure that client deadlines are met, she also ensures adequate technical expertise and personality fit with the client. Kristen spends a considerable amount of time on her first year engagements analyzing prior period financial statements and related permanent documents to ensure compliance with applicable HUD, GAAP, partnership, and/or other applicable regulations. The time Kristen spends planning her engagements leads to smooth execution at year end. Based on her planning analysis, Kristen also suggests ideas to the client to make their operations more efficient. During the year end execution phase, Kristen spends time at the client's offices overseeing the staff and ensuring the engagement is executed as efficiently as possible, all while communicating with the client on a regular basis.

Kristen is experienced with audits that adhere to HUD, RD, and IRC Section 42 guidelines, overseeing the completion of approximately 500 audits each year. Kristen's portfolio of clients includes not-for-profit housing organizations that have mortgages under the HUD 202 program, as well as for-profit clients that have properties throughout the United States. Some of these engagements have only 1 or 2 audits, and others have more than 150 entities that range from Section 42 properties, market rate properties, development companies, management companies and even conventionally financed properties with significant commercial space. She has helped these clients analyze management fees charged, reviewed the clients' accounting for related party payables, and provided ideas to improve operational efficiency, all while collaborating with the client to ensure they are receiving the best possible client service and meeting all their regulatory deadlines.

Kristen serves on DOZ's evaluations committee, responsible for overseeing employee and intern annual evaluations to ensure that our staff continues to grow and evolve, ensuring top tier talent for our clients.