

Path Ahead Panel: The business landscape in 2021

Webinar Presenter Biographies



Thomas L. Bakaitus, Jr., CPA, MST - tlbakaitus@herbein.com
Regional Managing Partner & Tax Director

Thomas L. Bakaitus, Jr., CPA, MST serves as the Regional Partner-in-Charge of Herbein's Western PA operations. He became partner in 2001 and is currently Operating Officer of Herbein + Company and Assistant Secretary of the firm's Executive Committee. With over 30 years of tax experience, Tom serves middle-market clients by providing tax compliance, planning, analysis, preparation and representation before federal, state and local authorities. He has specialized experience in consulting partnerships, corporations and start-up entities particularly in the fields of construction, affordable housing, manufacturing, real estate and healthcare. Tom takes great pride in helping his clients navigate business challenges. "I enjoy solving puzzles," explains Tom, "And not just complex cases. My years of experience managing Herbein's Western PA offices give me a unique perspective in helping business owners and entrepreneurs manage day-to-day operations."

Tom is a member of Herbein's M&A team, where he uses his expertise for tax-based transactional planning and analysis. For example, on the sell-side, Tom may be called in to help the seller achieve a tax-efficient liquidity event. His contributions in the tax-based due diligence process are on both the sell-side and buy-side. In the acquisition process, Tom also plays a key role in entity structuring. His greatest satisfaction comes from finding solutions in which adverse parties are all agreeable to. Pittsburgh Magazine has named Tom a 5-Star Wealth Manager eight times – 2010-2013 and 2016-2019. He was awarded California University of Pennsylvania (CAL U) College of Liberal Arts Alumnus of the Year in 2011 and gave the commencement address to the CAL U graduating class in 2017. In 2015, the National Academy of Public Accounting Professionals (NAPAP) named Tom one of the Top 10 Public Accounting Professionals in Pennsylvania. In addition to being a member and Past President of the Allegheny Tax Society, he currently serves on the Board of the Associated Artists of Pittsburgh.



Josh A. Pollet, CPA - japollet@herbein.com
Partner in Charge of Firmwide Accounting and Auditing Practice

Josh A. Pollet, CPA has the distinction of becoming the third Herbein partner who began their career as an intern with the firm. Upon graduation from Pennsylvania State University, he joined the audit department in 2005. Josh manages the audits of several of the firm's largest clients. He works primarily within the dairy, food, cooperatives, and manufacturing industries.

Josh has addressed key financial measurements and cost accounting topics at various food and agricultural industry conferences. His knowledge of cooperative operations has led him to speak at the National Society of Accountants for Cooperatives (NSAC) national conference. Josh is the current chairman of the Accounting and Auditing Committee for the NSAC and serves as the vice president of the organization's Atlantic Chapter.

Josh was recently named one of the 40 young professionals as the Lehigh Valley Business 2018 Forty Under 40. He was selected for his commitment to business growth, professional excellence, and the community.

Josh enjoys traveling, playing golf, and spending time with his wife and daughters.



Joseph J. Witkowski, CPA - jjwitkowski@herbein.com
Chief Financial Officer

Joseph J. Witkowski, Jr., CPA joined Herbein + Company, Inc. in 1992 and currently serves as Partner and Chief Financial Officer. Joe is the third CFO in firm history and previously served as the Partner-in-Charge of Human Resources. Joe provides tax planning and CFO level services for a diverse client base comprised of construction companies, retail establishments, medical and dental practices, and service providers. Joe is adept at guiding business owners in growth mode, with a focus on transactions, business exit strategies, and succession planning. He has a unique understanding of buy-sell agreements and helps owners reach agreements that make sense for all parties.

Joe's skill and experience allow him to develop accurate financial forecasts, analyze risk, and evaluate tax implications which provides insights which allow business owners to make informed decisions. He has assisted in the transition to new ownership through operational analysis, evaluation of financing options, and staffing reviews.

Joe works with business owners on exit strategies. This process begins by determining owner goals and objectives – financial and non-financial. Joe's experience includes family succession planning, partner buy-outs, and management acquisitions.