

Welcome to the Summer edition of our *Inside Swenson* newsletter. We are pleased to provide you with the latest news and update you on some of the exciting happenings at Swenson.

INTEGRA INTERNATIONAL AAANZ REGIONAL CONFERENCE 2025 — ST. LOUIS, MO



Integra International's Regional Chapter, AAANZ, is responsible for coordinating the activities of its members in the Americas, Asia, Australia and New Zealand. The Chapter works with the Global Board to see that Integra's worldwide objectives are achieved and that specific programs are implemented at the regional level.

The AAANZ Regional Conference 2025 took place May 15-17 in St. Louis, Missouri at the Chase Park Plaza Hotel and was co-hosted by Integra International and the St. Louis firm Abeles and Hoffman, PC.

Representing Swenson Advisors at the Conference were **Steve Austin**, Managing Partner, **Jim LoPresti**, Business Development Executive, and **Yulia Shchurovska**, Audit Director. **Steve and Yulia joined with Jim Rose of Abeles and Hoffman to present and speak on the topic of "The Status of Statements of Quality Management Standards".**



Steve Austin



Yulia Shchurovska

INTEGRA AAANZ 2026 IN SAN DIEGO

**SWENSON ADVISORS WILL BE CO-HOSTING WITH INTEGRA INTERNATIONAL
THE AAANZ 2026 REGIONAL CONFERENCE IN SAN DIEGO, CALIFORNIA**



San Diego

INTEGRA  **INTERNATIONAL**®
YOUR GLOBAL ADVANTAGE


SWENSON
A D V I S O R S
— CERTIFIED PUBLIC ACCOUNTANTS —

Swenson Advisors is very excited to be co-sponsoring this special annual event and is planning with Integra an exceptional business agenda that will address and update participants on vital topics and business challenges.

AAANZ 2026, which will take place in May, will offer **opportunities to network and build valuable connections** with fellow Integra members. We are also planning a **social program that will introduce our attendees to our wonderful City of San Diego.**

WELCOMING OUR NEW CLIENT: GENESIS RECOVERY

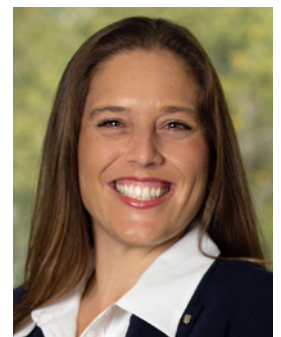


Genesis Recovery's San Diego Treatment Center

GENESIS RECOVERY is a state-licensed, non-profit, drug and alcohol rehab in San Diego devoted to restoring the lives of men afflicted with the disease and lifestyle of addiction. Its multifaceted approach to treatment draws from the most effective modalities available, including medication, clinical, 12-step, faith integration, education, and community. Genesis Recovery's long-term, highly-structured addiction recovery program fosters individual growth and lasting recovery from problematic drug and alcohol use by fostering healing of the brain, body, thinking, relationships, and sense of worth and purpose. **The addiction treatment center is located just 30 minutes east of downtown San Diego** in the foothills of the Cleveland National Forest.

Genesis Recovery is blessed with **a treatment team comprised of licensed and credentialed staff, all Christian, some in recovery, and each of whom brings a wealth of personal and professional experience** to those seeking addiction treatment.

Dr. Julie Hayden is Executive Director of Genesis Recovery. She is a licensed psychologist (PSY24184), COO of Rhombus, Clinical Director of Rhombus Counseling, La Mesa Counseling, New Vision Counseling Center and Genesis Recovery. Dr. Hayden has a BA in Interdisciplinary Studies from Christian Heritage College and a Master of Religious Studies, a Master of Arts in Counseling Psychology, and a Doctorate of Psychology from Southern California Seminary. She has nineteen years of clinical experience, has taught at numerous universities, was previously the Dean of a local university, and co-founded Rhombus University.



Dr. Julie Hayden

To learn more about Genesis Recovery, please click on the following link:
<https://vimeo.com/428888800?p=1s>

SWENSON MEETS THE NEW SECRETARY OF TRANSPORTATION



In late June, **Steve Austin** and a number of the **Swenson team** had an opportunity to meet the new **Secretary of Transportation, Sean Duffy**, at a Gala Lunch at the Westin Carlsbad Resort and Spa. A number of our clients and prospective clients also got to meet with him.

The photo of Steve Austin and Sean Duffy was taken at the luncheon.

HOT TOPICS



Swenson Advisors is currently planning a Hot Topics Seminar, and we invite you to join us for this event which will address current, vital issues and challenges. We will be providing more details shortly, including the date, theme, location, featured speaker and other speakers.

MEET MEI BAI



Mei Bai, MBT

Tax Supervisor, Swenson Advisors

Mei Bai is a seasoned accounting and tax professional with more than 20 years of accounting and tax experience at public accounting firms and commercial banks. She has worked extensively with businesses across a wide range of industries, including manufacturing, technology, healthcare, professional services, real estate, and non-profits, providing tailored solutions that align with clients' financial goals and compliance requirements.

Mei came to the US in 2005 with her husband and son after working in the accounting department of a national commercial bank in China for several years. **She received her Master of Business Taxation (MBT) from the University of Minnesota in 2008.**

Prior to joining Swenson Advisors as a tax supervisor in 2018, Mei worked at a Los Angeles public accounting firm for ten years, where she developed deep expertise in financial statement audits, tax planning, and compliance.

Mei met her husband, Changmu, at a tennis training camp in Shenzhen, China. They have now been married for almost thirty wonderful years. Together, they raised an incredible son, Baiyu, who—after graduating from Pomona College, an elite liberal arts school—has been working at high-tech companies. Baiyu is now at Meta in New York City and enjoys playing the cello and basketball in his free time.

In her free time, Mei loves to stay active by playing tennis, get creative by planting flowers, and to explore new places through travel. Whether she is on the court, in the garden, or discovering a new destination, she enjoys the experiences that keep her energized, inspired, and connected to the world to satisfy her curiosity for different cultures and perspectives.



Mei visited her son, Baiyu at Hudson Yards in New York



Mei and Baiyu in Mexico City

CONGRATULATIONS 2025 GRADUATES

SWENSON ADVISORS OFFERS ITS SINCERE CONGRATULATIONS TO ALL 2025 GRADUATES

Steve and Gail Austin are especially proud of their grandchildren, Raul Gonzalez, Jr. and Annie Gonzalez, who received their 8th grade diplomas from Santa Fe Christian Schools in Solana Beach, CA.



Raul Gonzalez, Jr.



Annie Gonzalez

OUR VERY BEST WISHES TO ALL THE GRADUATES.

GOOD LUCK AND GOD BLESS YOU AS YOU MOVE ON TO THE NEXT PHASE IN YOUR JOURNEY.

***MAY YOUR FUTURE BE FILLED WITH HAPPINESS, ENDLESS OPPORTUNITIES,
AND MUCH SUCCESS.***



FOUNDATION UPDATE

SWENSON
**Children's
Foundation**



***Building Faith.
Changing Lives.***



Swenson Children's Foundation is very pleased to have had the opportunity once again to be a supporter of Faith Community Church's Vacation Bible School in Carlsbad, CA.

It was a great week for the children who attended the 2025 VBS. Activities were centered around Bible study and Christian teachings and included lots of fun games and arts and crafts. It was also an opportunity for the children to connect with their friends and make new friends as well.

As in past years, we were delighted to provide the children and participants in this July's VBS with a pizza lunch on the last day of the VBS.