LEGACY OF SUCCESS

75 YEARS 1948–2023

(From left) Managing Partner Sara Downing, Partner Cherie Odom, and Partner Linda Gibson.

[TWRU CPA'S AND FINANCAL ADVISORS]

Building solid relationships has ensured a 75-year legacy

EDGAR THOMAS WAS ahead of his time when he started his accounting firm in 1948 with a "work-life balance" approach.

He and early firm leaders Stewart Wilson and Jake Ragusa were willing to put in the long, hard hours needed to help clients with their financial needs. But they also prioritized maintaining a warm, friendly office atmosphere and ensuring employees enjoyed their work—an attitude they believed would create a better product for their clients.

Seventy-five years later, those following in the founding partners' footsteps at what is now known as TWRU CPAs and Financial Advisors still hold to those values. And they have proven key to the firm's longevity.

"The early leadership set the tone here, and we're still carrying on that tradition," says TWRU Partner Linda Gibson. "We have a mentality here that family comes first. That goes for our employees and those we serve. We put their family and their values at the forefront, too."

TWRU is a full-service public accounting firm. For its business clients, it offers accounting services, audits/reviews, business financial planning, business tax services, business valuations, technology assistance and succession planning. For its individual clients, TWRU provides current tax planning, tax return preparation, financial planning, estate planning and retirement planning.

The company name is derived from the last names of partners who managed the firm in the early days, specifically Thomas, Wilson and Ragusa. In 1973, they added new partners Warren Bofinger and Walter Simmons, and in 1977, they welcomed the first woman partner, Lynn Richard. In 1987, Kerry Uffman joined the firm and in 2011, the name was changed to TWRU CPAs and Financial Advisors.

Today, TWRU is led by Gibson, Managing Partner Sara Downing and Partner Cherie Odom. With more than 30 employees, it is one of the largest firms of its kind in the area. Key to its success is the fact that TWRU understands that it's critical to keep up with technology, shifts in tax law, reporting requirements and other aspects of a constantly changing industry.

TWRU gives employees flexibility and values their contributions not just to the firm, but to the larger Baton Rouge community. Many employees serve on the boards of local nonprofit organizations and volunteer their personal time for worthy causes. The company also donates to local charities and sponsors special events throughout the year.

Striking a balance between work and personal life is challenging, so TWRU encourages its employees to enjoy a social life and be involved in their families' lives. This kind of work/life balance, Gibson says, is due to previous leaders who were willing to try things that were new, different and even unusual at the time. They were early adopters of concepts like part-time and remote work, she says.

While ensuring a positive atmosphere for employees is a priority, it's equally important to extend the same treatment to clients. Gibson says she's confident TWRU will be around for another 75 years because it treats clients like family—keeping their best interests at heart and being willing to go the extra mile for them. "Our firm is successful because we focus on our clients' needs and we listen," she says. It's not a cookie-cutter type of environment. Each client's situation is unique. We listen to what they want and help them reach their financial goals." ■

From the Managing Partner

It is exciting to be celebrating 75 years in business, but with that milestone comes the responsibility to continue the legacy. It's a joy to come to work each day with the great people we have working at our firm. It's one big family. We appreciate and value our clients, and consider them a part of our family tree. It's important for us to get to know them well so we can understand their personal and business financial goals and work with them to achieve those results. Watching our clients succeed gives us a feeling of success as well. I'm proud to be a part of this firm and its history, and I look forward to what the future holds.

SARA DOWNING
Managing Partner

HIGHLIGHTS

TWRU stays connected to the community through donations, volunteer work, and sponsorship of special events, including an annual golf tournament.

75 TWRU CPAs & Financial Advisors APPRECIATING SINCE 1948

Rooted in success since 1948, TWRU CPAs & Financial Advisors has been offering solid financial advice and guidance to individuals and businesses for 75 years.

CONNECT WITH US

TOP EXECUTIVES: Sara Downing, Managing Partner; Linda Gibson, Partner; and Cherie Odom, Partner

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