



(from L to R) Partner & Director of Operations Tricia Duncan, CPA, Co-managing Partner Jeremy Prickel, CPA, and Co-managing Partner Robin Matthews, CPA. Photo by Jack Liu.

Looking Back & Leading Forward

From a small accounting duo to one of the Pacific Northwest's most trusted firms, Jones & Roth CPAs & Business Advisors looks back on its 75 year history.

BY VANESSA SALVIA

It's remarkable for just about any business to survive for 75 years. Over the years since its founding in 1946, Jones & Roth has not only survived, it's become one of the largest and most trusted CPA and advisory firms headquartered in Oregon. Today, with 12 partners and a team of 100, its specialized teams of experts work year-round to help businesses, nonprofits, and individuals achieve their financial goals.

The Company's Early Years

The story of Jones & Roth began back in 1946, when Bill Haggerty and Archie Ruff worked as accountants for the Edward Hines Lumber Company in southeastern Oregon. Just southwest of Burns, the town of Hines was originally known as Herrick, so named for Fred Herrick, who founded a lumber company and railroad there. When Edward Hines bought the railroad and lumber company

from Herrick in 1928, he established a post office there and renamed the town after himself. Bill Haggerty moved over to the Willamette Valley and started an accounting practice in 1946, and six months later Archie Ruff joined him to form Haggerty Ruff & Co., the firm that would one day become Jones & Roth.

The small firm of Haggerty Ruff & Co. grew and brought in new partners. In 1974, a young accountant by the name of Doug Griesel joined the firm. Like many young men of the time, Griesel had started out working on the green chain for Seneca Sawmill while going to school, and at first didn't like accounting very much. "Everybody else on the green chain had degrees in history and English and things like that," recalls Griesel, so he started to reconsider the value of his education. "I thought, maybe I'd better go back to business. So I went back to accounting." Griesel graduated from the University of Oregon in Eugene and has been part of the community since 1969.

When Griesel joined, the firm had five partners but only one other accountant. "And there were about three bookkeepers and a couple of receptionists," Griesel says. "It was more of an accounting and tax practice that did a lot of bookkeeping." Led by managing partner Lanny Jones, the firm was a close-knit group then, and still is. At that time, the office was a new building built by the partners on 444 B Street in Springfield, Oregon.

Back in the early 1970s, the accounting profession was remarkably different. During that time, the profession's attempt to self-regulate business solicitation ended up having far-reaching consequences that prohibited accountants from seeking clients through advertising. Aside from getting referrals, buying another practice became the most reliable way that an accounting firm could grow.

"We could not directly solicit," recalls Griesel. "They even restricted how big our name could be on the door — the letters couldn't be more than four inches or so. It was just unbelievably restrictive." Over the years, the language relaxed. "But that opened the floodgates," says Griesel.

The Beginning of Women in Leadership

The firm has welcomed numerous women into leadership positions over the years, but the first woman to become a partner was Jill Foster. Born the same year that the company was founded, Foster first started at the firm working as a bookkeeper in 1974. "Bookkeeping at that time meant filling out informational sheets and giving them to a mainframe computer the size of an entire room," Foster recalls. By the time Foster had been with the firm three or four years, Lanny Jones encouraged her to earn her CPA credential, so she went back to school for her accounting degree and became a CPA in 1979.

Foster recalls enjoying providing financial reviews and compilations for her clients. "I really enjoyed that work because the clients knew you were really there to help, but they also wanted information that they knew was accurate," she says. "All of the partners were really experienced and good at what they did. It was a fun crew." When Foster retired in 2000, she had paved the way for many women to follow in her footsteps.

Growing The Firm

Griesel says he stepped into "a good situation" when he joined Haggerty Ruff & Co. At that time, Bill Haggerty and Archie Ruff were nearing retirement and another partner Ed Stack had decided to leave and start his own accounting firm with his son, which opened up new opportunities to the younger team members. Alongside Griesel was Roger Noah, who had previously worked at Coopers & Lybrand. "Roger and I were both in a position to step in and start managing a lot of the practice, even though neither one of us had a whole lot of experience behind us yet," says Griesel. "We learned fast."

During the late 1970s, the firm went through a number of transitions. When Haggerty and Ruff both retired, Doug Griesel and Roger Noah joined Lanny Jones and Ron Calkins as partners. Then Mike Lewis, who had also previously worked at Coopers & Lybrand, joined the firm.

In those days, there weren't titles like staff accountant or manager. "I started as an accountant

like everyone else did,” says Lewis. “I did tax return preparation and reviews, financial statement preparations, audits of financial statements, or anything that needed to be done at the time. We were a small firm then, but we were growing.”

In 1979, when Ron Calkins left to start his own practice, Lewis was invited to become a partner and the firm became known as Jones, Griesel, Noah & Lewis.

Lewis became active in the profession over the years, serving on the Oregon Board of Accountancy, the Accountancy Peer Review Committee, and the board of the Oregon Society of Certified Public Accountants. Lewis was instrumental in making changes to the laws relating to CPAs receiving commissions. Lewis also had a license for governmental accounting and auditing, so he was able to bid on jobs for cities locally and around the country. “We were always looking for ways to expand our services,” Lewis recalls.

In 1981, the firm was approached by David Roth and Dick Rice to discuss a potential merger with their small, Eugene-area accounting firm Roth & Rice. Seeing that the Eugene area had some potential, the two firms merged in 1982. It took a while to settle on a new name, but they agreed on a simple combination of the two firms’ managing partners Lanny Jones and David Roth—Jones & Roth—and it has been known by that name ever since.

A Focus on Client Relationships

Accountants Gary Kronmiller and Jeff Bourdage joined the firm as part of the Roth & Rice merger and they both went on to become partners themselves. Colleagues recall Bourdage as a man who stood out from the crowd thanks to his ability to connect with people and build strong, long-lasting relationships. “My mantra was that I wanted to be personable,” Bourdage says. “I really felt like I was a teacher for my clients and I never wanted them to feel like I was above them.”

One of Jones & Roth’s core values is to make a positive impact in people’s lives. “We are trusted advisors for our clients,” Bourdage states. “Our sole purpose is to help them succeed — that’s the positive impact.”



Top: Doug Griesel (left) and Roger Noah (right) outside the Springfield office of Jones, Griesel, Noah & Lewis circa 1979. Left: The office interior at 444 B Street. Bottom: The Jones & Roth office on W. 11th Street in Eugene.



Looking back on his career, Bourdage says that Roger Noah and Mike Lewis were both important mentors for him. Noah clearly had a passion for helping his clients grow their businesses. “The most meaningful part of my career at Jones & Roth was assisting our clients in their growth,” Noah says. “Many of our smaller clients went on to become very successful businesses.”

The Advent Of The Computer Age

Phil Stice, a partner who retired in 2005, worked at Coopers & Lybrand along with Noah and Lewis in the late 1970s. Stice saw that computers were going to become critical to the future of accounting and tax preparation. Stice told Coopers & Lybrand’s partners that he really wanted their firm to get more involved with microcomputers. They said no. “So I went to another local firm that was pioneering the use of microcomputers in those days,” Stice says. “They didn’t have that much work for me to do so I was essentially building computers and installing Lotus 1-2-3 on them.”

Networking connections led him to Lanny Jones, who convinced him to join Jones & Roth as a tax manager – except Stice didn’t want to be a manager. He had his sights set on becoming a partner within a year and a half. “It was a big, bold ask, but it was to my advantage, because I knew what I really wanted. So then they asked me, ‘Is there anything else?’ and I said, ‘Well, I really think that the personal computer is the future of our industry and I’d like to have one.’”

They gulped, because computers were expensive in those days. But, a substantial piece of tax legislation called the Tax Reform Act of 1986 had just passed. “It changed everything,” Stice notes. Jones and the other partners discussed Stice’s request and asked him to join the team to help them sort it all out. “I resigned from the other firm and went to work over in the Springfield office,” he says. “I felt at home right from the beginning.”

Stice’s new computer was an IBM about the size of a large, portable sewing machine. “We would complete all the information on these worksheets, then we handed them off to be input into the computer and it would

generate a diagnostic sheet,” says Stice. “So you ended up with this nice package with the client information at the bottom of the file, the input sheets, and the diagnostic report.”

Someone would check the math using a non-photo blue pencil, which the photocopier couldn’t pick up. Receptionist Diane Knoedler then would type the first two pages three times. “So there were typed pages and photocopies of handwritten pages,” Stice recalls.

Advancing Technology

Connie McMahan is Jones & Roth’s software and database manager and has done almost every single non-CPA job there is to do at the firm. She first started as a temporary tax season receptionist at a firm called Derrickson & Gault, but quickly gained more responsibilities. There were days when McMahan had free time in her schedule, so she taught herself WordPerfect – the former dominant player on the word processing market.

In the mid-1980s, Derrickson & Gault merged with Jones & Roth, bringing new partner Dave Gault into the firm. “We also brought over the PC computer and the HP LaserJet and a team of data entry people who filled out the sheets and then would enter the sheets into the computer terminals each day,” recalls McMahan. “It would take a few hours to compute and then they would print the reports.”

In 1987, the firm bought a Hillsboro-area practice and partner Roger Noah moved up to the area to open an office. That same year, the firm took a big step forward technology-wise when they installed their very first computer network. “Before we had networks connecting the offices, I had to drive around to each office to install all the software,” McMahan says.

McMahan became the go-to person for training team members on how to use the computer systems. In fact, the company often had her review software before they decided if they would use it. “It was a big transition,” she remarks. “People were still filling out input forms by hand. It would have to go through this whole process,

calculate, print, and then if you found a mistake you'd have to do it all over again."

When some people on the team realized that advances in computer software meant they would have to do some typing, they balked. "What do you mean? I have to type? Isn't that an admin job!?" she recalls with a laugh. "But the print preview is what sold them," she says.

Computers became a lot more widely used and less expensive as time went on. Software improved. The days of handwriting tax returns were soon over, as CPAs could input the numbers directly into the software. In 1997, the firm brought in Doug Habliston to direct the IT department and expand the firm's network capabilities. He also led the team that coordinated business information services for clients. "We gained so much efficiency and we could stay competitive with a lot of other firms in our market area by using technology to get things done faster without having to raise rates," Stice says.

Passing the Baton to the Next Generation

Current co-managing partner Robin Matthews joined the firm in 1990. Growing up in Arizona, she had started working for her dad's accounting and tax practice in junior high. After graduating from college, she worked as an accountant for a couple of years and earned her CPA license before moving to Oregon and joining Jones & Roth.

That same year, the firm welcomed new partners Jerry Willey and Dan Mueller, who specialized in business tax and advisory services, and two new offices in Hillsboro and Forest Grove. A couple of years later, the firm celebrated Lanny Jones' retirement and Doug Griesel took the helm as managing partner.

Griesel remembers wanting to emulate his mentors Bill Haggerty and Lanny Jones as he led the firm. "Bill really got involved with his clients and Lanny was cast from the same mold," says Griesel. "They really cared about their clients, not just about the numbers and their businesses, but also their personal lives and future plans. Those two influenced me a lot in terms of how I wanted my relationships to be with my clients, and how I wanted our firm's relationships to be with our clients."

Griesel led Jones & Roth with an entrepreneurial mindset and a strong focus on client service. The firm started to distinguish itself by branching out into industry and service area specialties. In the mid-1990s, Griesel told a reporter for the Business News in Springfield that, "We look for people who are not afraid to get out and do things."

Mueller still remembers the time when he and Willey were considering merging their practices into Jones & Roth. "The people at Jones & Roth impressed us as being progressive and interested in new ideas of doing things, which was the kind of firm I wanted to be a part of," he says. "They looked at the firm as a whole firm, not just individual offices or practices, even back then. It was a very different style."

From a business standpoint, Jerry Willey agrees that as a firm they were pretty progressive. "We were always trying to look out ahead to see what was coming down the pike, thinking about the impact on our firm, looking for opportunities to grow," Willey remarked. After retiring from the firm in 2010, Willey went on to become the Mayor of Hillsboro and is now serving as a Washington County Commissioner.

The drive to improve and grow was not reserved for the partner group, however. When current partner and Director of Operations Tricia Duncan joined Jones & Roth in 1994, she was a brand new staff accountant. She recalls a time working with Robin Matthews on a client project and realizing that there was no systematized process for tick marks and referencing. "Robin and I met with Mike Lewis and explained how we'd save time and be more efficient if we could change things and have everybody doing it the same way," Tricia recalled. "And he just said, 'Go create it!'"

In many firms at that time, it would have been unheard of. "In most firms, you didn't just walk in and ask the partner if you could change the way things were done," Tricia says. "Our partners created an environment where ideas and creativity by all the team members were valued and that continues today."

Current partner Fritz Duncan joined Jones & Roth as a manager in 1995. “I was working at another firm before I came to Jones & Roth, and I remember seeing Tricia’s bosses, the partners at Jones & Roth, and thinking to myself, ‘I want to be like that when I grow up.’ They are pretty impressive people. Doug Griesel and Mike Lewis were both mentors for me.”

Over the years, Fritz has become an expert in audit and assurance work for nonprofit organizations and has developed his expertise in the affordable housing sector. While on-site audit work is still commonplace today, Fritz remembers when it was much more labor intensive. “We had these giant binders for the audits and you needed two or three giant binders to have your workpapers,” Fritz says. “So we needed these big suitcases, we called them audit bags, to carry everything, and you had to be strong to carry those!”

“We also had to bring along portable printers,” Tricia added. “For us women, we were in heels, suits, and pantyhose, and just sweating while we’re carrying these heavy bags to the clients’ location. It was crazy, and so different back then.”

Learning Valuable Lessons

When current co-managing partner Jeremy Prickel first started at Jones & Roth in 1995, he was a college intern. Known for his servant leadership style, Prickel volunteered to cover the front desk and answer phones when the receptionist had lunch. “We called him the ‘Noontime Receptionist,’” Connie McMahan says. “The whole admin team had a lot of respect for him because he had done the jobs that they had done.”

“It was so helpful for me to have that experience,” Prickel says. “It ended up giving me a real appreciation for our admin team because I experienced firsthand how difficult it is to be in that role.” Prickel interned for two tax seasons, then worked at Weyerhaeuser and Yergen & Meyer while finishing college. In 1999, he came back and joined Jones & Roth as an accountant, and by 2007 had become a partner in the firm.

When Doug Griesel retired in 2016, he passed on the responsibilities of managing the firm to Robin



Team members in 2008: (back) Doug Griesel, Dan Caplis, Gary Kronmiller, Jens Anderson (middle) Forrest Arnold, Dave Gault, Jeff Bourdage, Bill Mason (front) Connie McMahan, Carrie Mason, Diane Knoedler

Matthews and Jeremy Prickel, who say they have deep admiration and respect for their predecessor. “I learned an incredible amount from Doug,” Prickel says. “In terms of being the figurehead for our firm he was the best there is. He’s a natural born leader and was so much more than just a business associate to his clients. He taught me what it looks like to build strong relationships with our clients and our team.”

Prickel recalls the way Griesel mentored him and brought him under his wing as he would meet with clients and strategic partners. “Doug was so intentional about connecting people,” Prickel says. “He was always doing what was best for the team, and he would bring people together, and invite people in, and help them be successful.” Leadership and relationship skills weren’t the only lessons that Prickel learned from his mentor.

“I went to school with his kids, and I remember how committed he was to his family and how he made a point to be at his kids’ events,” Prickel says. “I really looked up to him, professionally and also personally, in the way that he always kept his family as his top priority. I wanted to be like him in that respect.”

Many of the firm’s current partners recall learning important life lessons from the partner group that came before them. Prickel remembers one particular time when he was a young accountant. “Jill Foster was reviewing a tax return I had prepared, and I had made a mistake,” he recalls. “It was obvious to her that I had just

been going through the motions, and so she sat down with me and said, ‘Look, you can’t just do a tax return and not think about it—this is somebody’s life that you’re dealing with, you can’t just breeze through it. She taught me how to carefully review and it was such a valuable lesson.”

Matthews remembers a similar poignant moment early in her career. “One morning I was so stressed out after finding out I had made a mistake,” she recalls. “I knew I would have to call the client and I’d have to tell Phil. So when Phil got to the office I told him what happened and he asked me, ‘Well, what’s the right thing to do?’ And I said, ‘Call the client.’ And then he said to me, ‘You can never go wrong doing the right thing.’ That has just always stuck with me and I still use that with my teams today.”

Those important lessons had a significant impact on the firm as it continued to grow over the years. In 2017, the firm moved its Eugene headquarters to its current location at 260 Country Club Road. The new space required a full demo and extensive design and renovation work and has received high praise from the Jones & Roth community.

Jones & Roth Today

Over the past 75 years, Jones & Roth has grown into one of the largest regional firms in the Pacific Northwest and is a trusted advisor to thousands of businesses and organizations.

Today, the team of over 100 employees is led by 13 partners and one director, including co-managing partners Robin Matthews and Jeremy Prickel. With offices in Eugene, Bend, and Hillsboro, Jones & Roth is on a mission to help their clients achieve financial and operational management excellence.

“Our firm has gotten to where we are today because of the partners who came before us,” says Tricia. “They built a solid foundation in our culture, how we work, and what we value, and that set us up for future success. Our current partner group took that foundation and built on it, adapting to make us more flexible and ready for change, and growing us to where we are today with our specialized practice and industry teams.”

When it comes to developing its team members, the firm’s philosophy is to help each person find the career path that fits their unique professional and personal goals. Today, women represent 46% of the partner group, and 64% of manager and director roles, which is significantly higher than the national average. “We have a very individualized ‘one-fits-one’ approach,” says Tricia. “It’s helped us increase the number of women in leadership positions and has also created a culture of inclusiveness for all team members.”

Jones & Roth received recognition this year, based on its percentage of women in leadership roles and its Diversity, Equity, and Inclusion work, being named as an Accounting MOVE Project “Best Firm for Leadership Equity” in 2021 for the fourth year in a row. With a desire to actively support local women in business, Robin Matthews spearheaded a project in 2017 called *INSPIRE: Celebrating Women Leaders in Business*. The annual event brings together women business leaders in Lane County and celebrates their success as entrepreneurs, managers, executives, and leaders in the business community.

The firm’s current strategy is focused on developing expert teams around its core specialty areas: affordable housing, construction, dental, family business, financial advisory services, healthcare, nonprofit organizations, private companies, retirement plan audits and services, tax services, and small business services.



Above: Partners Evan Dickens (left) and Brian Newton (right) oversee the firm’s Bend office. Photo by Marisa Chappell.



Eugene team members gather in the lobby of the new Eugene headquarters. (L to R) Matt Adams, Mark Coombe, Sara Hummel, Jim Christian, Tricia Duncan, Jeremy Prickel, Robin Matthews, Fritz Duncan. Photo by Jack Liu.

The teams have been experiencing a surge of growth in the past few years. “We’ve always had an emphasis on working in industry specialties, but it’s become much more important in recent years for us to truly be experts in our industry and specialty segments than ever before,” says Prickel. “Our clients need a much higher level in terms of expertise within an industry area and that is why we value and nurture industry expertise so greatly here.”

Matthews agrees that industry knowledge is what sets Jones & Roth apart from other firms. “Accounting is just so much more complicated today, so we’ve spent a lot of time developing our teams and understanding our clients’ needs,” she says. “We’re able to be confident in our recommendations because we’ve learned a lot over

the years working with our clients. We’ve learned how their industry works, how they think, what they need, and what their pain points are. That makes it a lot easier for us to do our job well and provide excellent value to our clients.”

Over the years, the people in the firm have changed but Bourdage says the firm really hasn’t. “I think the common thread over the years has been the sense of camaraderie and the attitude of teamwork,” Bourdage remarks.

Tricia Duncan agrees, “We know more than ever that change is constant, but those same foundational values from the beginning of our firm remain today – curiosity, team member involvement, being open to feedback, and working together to succeed through any challenge that comes our way.”

Reflecting back on how the firm has been able to realize its core value of “making a positive impact in people’s lives,” Mike Lewis puts it simply. “We care about people,” says Lewis. “We really do. Everything we do is focused on better serving them.” That’s been the firm’s motivation since its founding 75 years ago in 1946, it was true during Lewis’s tenure, and it remains true today.



Vanessa Salvia is a writer, editor, and content creator with a 20-year career in journalism. Her work has appeared in The Register Guard, 1859 Oregon’s Magazine, BEND Magazine, and many other publications.

Thank you to all of our firm’s partners over the past 75 years for contributing to the legacy of Jones & Roth:



- | | | | | | |
|---------------|---------------|-----------------|--------------------|----------------|----------------|
| Bill Haggerty | Richard Rice | Jill Foster | Roy McCracken | Fritz Duncan | Sara Hummel |
| Archie Ruff | David Roth | Phil Stice | Bill Mason | Robin Matthews | Nicole McOmber |
| Ron Calkins | Mike Lewis | Jerry Willey | Shirley Braunstein | Jeremy Prickel | Mark Reynolds |
| Ed Stack | Roger Noah | Dan Mueller | Jim Christian | Evan Dickens | Kari Young |
| Lanny Jones | Dave Gault | Jeff Bourdage | Cathi McNutt | Jon Newport | Carrie Fortier |
| Doug Griesel | Jens Andersen | Gary Kronmiller | Tricia Duncan | Brian Newton | Elliott Tracy |