

PRESS RELEASE 10/30/01  
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### **Helping Others to “Exceed Client Expectations”**

“Exceeding Client Expectations” is the motto of David Delisi and his staff at Delisi and Associates P.C., a Greensburg, PA CPA firm formed in 1985. For over 15 years Delisi and his team have helped a variety of small to medium-sized businesses and individuals achieve their financial goals and relieve financial stress. The firm provides services from tax preparation and estate planning to financial audits and financial software sales and support. The firm represents a variety of clients including many local travel and tourism businesses.

Delisi recently turned to The Progress Fund for some help of his own. He needed a \$50,000 loan to complete the purchase of a 75-year old historic structure with 3,128 square feet of office space. A growing business with eight full-time and three part-time associates, including four CPAs, Delisi needed to expand his firm’s workspace after many years in smaller offices at Pineview Place Office Condominiums. In the process, he wanted to save a significant structure in Greensburg’s downtown historic district that was once the office of a well-known doctor, and later, an optometrist. Delisi decided to make more functional use of the building at 217 South Pennsylvania Avenue by demolishing the detached rear office building and adding parking and other amenities.

“We are bucking the trend,” said Delisi. “Instead of moving away from the city like many businesses are doing, we moved right downtown. We are glad to be part of the new revitalization of Greensburg. I think we fit in nicely with the unique variety of boutique shops and service businesses that flourish here.”

“We are delighted to be able to provide financing to Delisi and Associates P.C. Downtown business ventures like Dave Delisi’s represent a win-win situation for the City of Greensburg and for the owner,” said Progress Fund Loan Officer, Diane Wiegman.

“The Progress Fund was easy to work with,” said Delisi. “They had a genuine interest in providing a quality loan, and fully supported my desire to help the community. By relocating a growing business into a downtown historic structure, we are insuring that the building and firm remain viable parts of the downtown economy.”

The Progress Fund is a spin-off of the Southwestern Pennsylvania Heritage Preservation Commission supported by Congressman John P. Murtha. The Fund is an equal opportunity lender whose mission is to create economic opportunity by lending needed capital and providing technical assistance to small travel and tourism-related businesses in a nine-county rural region of southwestern Pennsylvania. The Fund’s loan portfolio includes 86 loans, which have created over 349 “living wage” jobs. Congressman Murtha, whose legislation originated the Commission said, “I am pleased that The Progress Fund is creating jobs in the heritage tourism industry for our region and wish them good luck.”

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