

ask^{the} executive



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What have been some of your biggest challenges? Biggest successes?

Our biggest challenges come through constant change—whether annual tax law changes or more fluid situations like Hurricanes Katrina and Ida and the pandemic. Our biggest successes, however, are navigating through these changes to fill our clients' needs and help them succeed.

During the pandemic we had to learn everything we could as quickly as possible about programs like PPP and EIDL loans so that we could get clients fast financial help. There were many resources available for small businesses, but if you didn't apply quickly, the funds could dry up. We worked diligently to locate what was available, often having to anticipate what would be required before application processes even opened.

As a small business owner myself, I can relate to my clients—I experience the same situations and have many of the same fears and concerns as they do.

How do you maintain a balance between your personal and professional life?

I consider my personal and professional lives to be a blend. The decisions I make personally have a direct impact on my ability to be a good professional, and the decisions I make professionally benefit me personally. There are times when my professional life demands all of my time and attention, and there are others when I can relax and have more fun, and I have found that the perfect blend gives me the ability to work hard and have fun in the right proportions.

Which changes or innovations do you hope to see for your company or industry in the next five years?

The accounting industry is constantly changing. My hope for my company is that we stay ahead of each change so that we can continue to be a reliable resource for clients and contribute to their success.

In your experience, what are the keys to maintaining a healthy and productive company culture?

A healthy, productive company culture comes with honesty and transparency, setting a good example, and offering flexibility. I never try to hide anything, and I answer questions honestly—I believe it is the only way. I also let my team know that they are important and appreciated. If someone makes a mistake, we can resolve it together.

It was always my goal to create a firm that offered enough flexibility to employees to have an impactful, exciting career and also enjoy their personal life away from the office. CPA firms have historically had reputations of being overly demanding, and I never believed this was necessary. It's possible to have a successful career and a happy personal life.

Who have been some of the greatest influences on your career or leadership style?

My parents were key influences—my mother a tax accountant and my father a computer programmer. They demonstrated the importance of dedication and a strong work ethic. I keep their pictures on my desk as constant reminders to conduct myself in a way that would make them proud of the professional I have become.

I have always believed in participative management and will never ask anyone to do anything that I would not do or to work harder than I am willing to work. Having your name on the door or owning a business does not make you better; it means you are responsible for setting a good example.

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Fun Fact

The best piece of advice I ever received was from a former boss who told me to save something every month. This is often the best piece of advice that I give. Saving for the future is important no matter how small the amount is. You have to start somewhere.