

RISING STAR ACCOUNTANTS

What makes an accountant a “rising star” in the profession?

That’s the question the Business Journal posed to some of the largest firms in the Valley region. On the following pages are profiles of those CPAs the firms identified as their rising stars.

The commonalities of these accountants closely reflect the conclusions of a 2010 study by financial software company **Intuit** that looked at how accounting would change by 2020. The report, titled “Future of Accounting,” predicted four trends:

New Opportunities: As accountants become more specialized, it requires collaboration on projects, so CPAs need both niche skills and people skills.

Demographic Shift: Minorities and women will represent a growing proportion of both accountants and clients.

Technology: Accountants and firms need computer and data analysis capabilities.

Branding: As the profession becomes more high tech, website design and social media will become methods for finding new clients.

Rishma Vedd, chair of the accounting and information systems department at California State University – Northridge, said that in her conversations with accounting firms looking to recruit graduates, technical skills are a major concern. Star accountants need advanced macro-writing skills in **Microsoft Corp.**’s Excel program, as well as knowledge of audit software.

“If you don’t have technical strength, you can’t move forward in a career,” she explained. “It has really changed the accounting profession.”

Kathy Johnson, partner at **Forensics Plus LLP** in



Johnson

San Bernardino and first vice chair at the California Society of CPAs, said today’s accountants are expected to have technical capabilities, but rising stars also have the old-fashioned business and sales skills that define them as “rainmakers.”

“When we talk about rising stars, they are people who understand business in general. They are not just numbers people, or as they used to call us, ‘bean counters.’ They are leaders,” she said.

Leadership in this context involves written and verbal communication. Johnson said writing is often hard for new accountants, who prefer to concentrate on information accuracy rather than making it understandable to others. And these accountants often need to develop their networking skills.

“Many accountants are not good at selling themselves,” she said. “It’s not about presenting numbers; you have to communicate with the audience, and speak to that audience, not in just one monotone voice, and not just the same rote presentation.”

Vedd at CSUN also emphasized the value of rising stars’ communication skills for giving presentations and feeling confident talking to clients.

“This is nothing new – we go through this all the time when we meet with firms,” she said.

A 2014 article in the *Journal of Accountancy* found that in general, only 20 percent of the population are natural networkers, while 10 percent are “naysayers” who avoid selling their work, and 70 percent are neutral. The study, titled “Raising Rainmakers,” said CPAs must develop their own networking style so they feel comfortable cultivating new clients.

“Many people have the misconception that network-

ing is manipulative and fake,” the article states. “CPAs must reframe their beliefs about the role of networking in the business world. Whether they are extroverts or introverts, CPAs can learn the relationship-building skills necessary to succeed at business development.”

Diversity

As an African-American woman, Johnson feels a personal connection to the diversity trend. Next year she will become chairwoman of CalCPA and plans to continue the organization’s mentoring and diversity programs.

“This is a profession that hasn’t always been open to people of color,” she said. “Now we need to show that this is a position that is open to everyone, and you can make a good living at it.”

Vedd said that diversity skills for star accountants include the ability to work with people from other cultures and countries by making them feel comfortable, speaking their language, and helping them understand accounting practices.

“Also, if you are a team player, you must work with diverse teams within the firm. If you want to be in the game, you must be part of a diverse group,” she said.

As the qualities that define a star accountant evolve, so does the industry itself. Vedd said that in addition to the Big Four firms, CSUN deals with about 20 mid-sized and small firms that recruit at the schools, as these firms have become a larger part of the market.

Johnson as CalCPA vice chair has noticed a lot of consolidation as smaller firms merge or acquire other similar sized businesses. She said succession has emerged as an issue because founders and senior partners at smaller firms are reaching retirement and want to cash out.

“The larger you are, the more possibilities you have of getting the next person, but smaller firms often don’t have anyone,” she said. “That’s why they’re agreeing to be bought out.”

STAR ACCOUNTANTS

Shashi Mirpuri, 38, is a tax principal at Squar Milner, working for individual and corporate clients in the technology, retail and franchise, manufacturing and distribution and apparel industries. He previously worked in Arthur Anderson's Los Angeles federal tax practice, where he gained experience in federal and state tax compliance, tax outsourcing, tax planning and research and analysis.

SHASHI MIRPURI

TITLE: Tax Principal

FIRM: Squar Milner Peterson Miranda & Williamson, Encino

SPECIALTY: Income tax

HOBBIES: Dining, fitness and attending sports events

Question: Why accounting?

Answer: Not sure what the trigger was that made me want to start take accounting courses but once I did, I never looked back. I graduated from California State University – Northridge for my undergrad in accounting and ultimately went back to CSUN for my master's degree in taxation. I enjoy the challenges and constant learning that comes from working in public accounting.

Your role in the firm?

I'm known for providing quality service and expertise to my clients. I am spearheading the recruiting efforts at CSUN. I also enjoy mentoring our future leaders and developing continuing education courses to enhance

the technical side of our office. I have also become a leader in the Tax Group dealing with tax provisions on both public and private companies.

What defines "star accountants"?

Firms and clients are looking for more than just a CPA; they are looking for a partner, a trusted advisor. Many of my clients have been with me for years, which I think speaks volumes for the relationships I try to build with them. Not only are they happy with the technical skills but they are also satisfied with the level of service they are getting. I would say my biggest "star skill" would be my communication. Most of my clients can get a hold of me 24/7 (whether through email or phone) and I try to be there for them no matter what.

Time management:

Days in public accounting can vary significantly, depending on whether it's tax season or not. Generally, I am either on the phone, in meetings or out with a client. I also spend a fair amount of time networking and I am part of various networking groups. Obviously, when things need to get done I am in the office working with my team.

Best part of your job:

Just the interaction with my clients. They become more than just clients and I am happy to call some of them friends. They know what's going on in my life and vice versa. When you have that type of relationship with your clients, you really try and go the extra mile for them. I pride myself in thinking outside the box, being creative and finding opportunities to minimize their liability and resolve issues. Plus, I love working on different types of clients – size, industries, public/private, etc. These are the main

reasons why I have chosen to stay in public accounting versus going private.

Biggest misconception about accounting?

The biggest misconception is that we like being at the office, tied to our chairs, doing math! That we don't have personalities and we don't like interacting with clients. Personally, this is farthest from the truth. I love socializing and getting together with clients, prospective clients and other service providers. I would rather be out at a client's site or networking than in the office.

Your personality at work:

I am not your typical quiet and shy accountant. In fact, I'm the complete opposite. I'm vocal, outgoing and interactive. I think I am pretty easy going and have no problem building relationships with colleagues or clients. I also am a good listener and I try to understand the client's objectives and pain points.

How should the profession change?

I would like to see us adapt to the technological world we now live in. Whether that's using technology to drive processes or finding easier and more efficient ways to prepare tax returns, technology should be the backbone behind everything that we do. We have definitely made some headway since I first started 17 years ago, but I think we have a way to go.

Favorite out-of-the-office activities?

I love spending time with my wife and kids. Both of my boys, ages 6 and 8, are involved in basketball so we love attending their practices and games. Personally, I love watching sports and working out when I can. I also think of myself as a "foodie" and love trying new restaurants.



Mirpuri: 'Vocal, outgoing and interactive.'

Career advice:

No matter what profession you choose, you have to put in the time to succeed and the accounting profession is no different. Take initiative and ownership of your career path and if you are passionate about what you do, the sky's the limit.

Life during tax season:

Intense and stressful. Hours ramp up pretty quickly and working 60 to 70 hours per week is common. Public accounting is definitely not made for everyone.

– Helen Floersh

Nicholas Sanchez, 37, is a taxation attorney working at an accounting firm. He settles tax matters for clients, including distributions, information reporting and attorney's fee awards. During his career, he has authored several articles about taxation issues and saved his clients millions of dollars in reduced or eliminated penalties from the Internal Revenue Service.

NICHOLAS SANCHEZ

TITLE: Tax Attorney

FIRM: Miller Kaplan Arase, North Hollywood

SPECIALTY: Tax law cases with the IRS

HOBBIES: Family time

Question: Why accounting?

Answer: It is more accurate to say that I chose a career in an accounting firm, rather than a career in accounting. I am actually not an accountant, nor do I have a traditional accounting background. Rather, I attended law school where I earned a law degree and then went on to pursue a master of law degree in taxation (LL.M.). My interest in tax began when I took an introductory federal income taxation course in law school with a very dynamic and engaging professor, Joshua Rosenberg, who is well known in tax law academia. He was kind enough to mentor me and to eventually put me in touch with Julia Damasco, formerly of Damasco & Associates and now a partner at Miller Kaplan Arase, with whom I have worked ever since.

Your role in the firm?

My practice includes advising clients with respect to the tax aspects of settlements and judgments, whether arising out of class action litigation, administrative enforcement actions or proceedings. I also provide tax controversy services at the administrative agency level as well as in the U.S. Tax Court, information return and

withholding compliance services, ruling requests, tax opinions and general tax consulting services.

Relationship with CPAs:

I have a synergistic relationship with my colleagues who are CPAs, accountants and paraprofessionals. I rely on them and their distinct skills to better serve our clients and, likewise, I support them primarily in research, analysis and planning of complex matters.

What defines "star accountants"?

Professionals in this field need to be willing to step outside their comfort zone and tackle a variety of client engagements. Gaining experience in a wide variety of substantive issues is invaluable to colleagues and clients.

Time management:

I spend much of my day reviewing and responding to emails and attending conference calls with clients. Frequent internal status and planning meetings with colleagues, keeping abreast of pertinent developments in tax, research and drafting of correspondence round out a typical week.

Best part of your job?

The varying interplay of facts, issues and clients

'The profession is demanding of time and diligence.' — NICHOLAS SANCHEZ

in any particular engagement is unique, which is challenging, stimulating and fascinating.

Biggest misconception about accounting?

If you take me as an example, there's a misconception that pursuing a traditional accounting background is the only route to becoming an integral member of an accounting firm.

Your personality at work:

This profession is demanding of time and dil-



Sanchez: Lawyer at an accounting firm.

igence. A good dose of stubborn perseverance has proven helpful.

New generation of accountants:

It's a disservice to stereotype generations. I be-

lieve the greatest value to the profession comes from the commingling of individuals with varying experience, ideas and ideals to better serve our clients who span a wide generational gamut.

Memorable experience?

Instead of joining my law school classmates to be sworn in with them as an attorney after passing the California Bar Exam, I was sworn in earlier by a notary public colleague so that I could immediately join in seeking 19 private let-

ter rulings from the Office of the Chief Counsel of the Internal Revenue Service in Washington, D.C. It was an extraordinary opportunity early in my career and a very memorable experience.

Favorite out-of-the-office activities?

I enjoy spending time with my amazing wife and three young children, the latter of whom fill my days with joy and chaos.

Career advice:

Find a great mentor who can invest time in your development and professional well-being. It makes all the difference.

Biggest mistake by clients:

Unfortunately, I spend quite a bit of time addressing and correcting avoidable compliance mistakes, such as seeking penalty abatements via administrative appeals. Developing a close relationship with a competent accounting and tax professional to remove barriers to ongoing advice and planning is very worthwhile.

Life during tax season:

While I try to support my colleagues as much as possible during this hectic time, my workload is not directly correlated to tax season. There are days that are so chaotic I have to remind myself to get out of my chair and take a break, while there are others that are more orderly and methodical. I unavoidably ruminate on client issues even when I leave the office, but tax season is generally like any other season for me.

Accounting mentor?

I had many wonderful professors who have contributed so much to my development. However, I owe a great deal to two very talented tax partners who have mentored me over the last 13 years, Jude and Julia Damasco. They have taught me a great deal substantively, but have also been examples with respect to the things that are less tangible, like how to earn the trust of clients, maintain one's integrity and continuously strive to be a respected advisor and professional.

– Stephanie Henkel

STAR ACCOUNTANTS

Josh Diamond, 31, works at a firm where his father is a name partner. Previously, he worked at the large firm BDO USA's office in Los Angeles. As controller, he supervises the firm's finances, handling payroll, accountable payable and similar functions.

JOSH DIAMOND

TITLE: Tax Manager & Controller

FIRM: Fishman Block & Diamond, Encino

SPECIALTY: Administering firm finances

HOBBIES: Golf



Diamond: Closer to dad, who is his boss.

Question: Why accounting?

Answer: I chose a career in accounting because I enjoy the problem-solving aspect of it. There is always something to figure out and learn and I felt that was key to picking a profession that would keep me interested. Every day I am learning new things that I can use to help better serve my clients.

Your role in the firm:

Provide full services to our clients, whether it is preparing returns, having in-person meetings or having conference calls. Cultivate long-term relationships with our clients. I am also the firm's controller and prepare monthly financials, process the payroll, and handle all things administrative within the firm.

What defines "star accountants"?

Firms are looking for accountants who are knowledgeable but more importantly can talk to clients and make them feel important and that they are in good hands. The client needs to be able to trust the accountant which I

believe leads to a long-lasting relationship. I think my biggest skill is making clients feel comfortable knowing that they are in good hands and that they can trust me knowing that I have their best interests at heart.

Working with family members:

I lucked out on this one – my dad and I have become closer as a result of my coming to work for him. We got along very well before and I feel that has helped with my transition into the firm. He has given me a lot of responsibility that has allowed me to grow as a person and as a CPA, meaning being the point person for some of his major clients and enabling me to pick up business of my own. I am a completely different person than when I started about five years ago and it's because of him.

Time management:

I spend a lot of time getting work done for my clients and doing special projects as they arise.

Best part of your job?

I think it's getting to meet new clients and learning about what they do.

Biggest misconception about accounting?

That it's boring! I think the reason I like accounting so much is that I look at a problem like solving a puzzle, and trying to determine not only where the pieces go but how everything fits together.

Your personality at work:

I am a pretty easy-going person and very methodical in how I do things, which helps me stay organized and on top of things as well as making it easy for me to interact with clients and for them to enjoy being around me.

New generation of accountants:

With the incredible growth in technology, the current generation is expected to take on a lot more work and be knowledgeable in more diversified areas of accounting along with meeting clients' demands for faster response times.

'My biggest skill is making clients feel comfortable.' — JOSH DIAMOND

Memorable experience?

Being a part of the process of meeting with a prospective client and understanding the process of learning how to represent the firm – and most of all yourself – in the most positive light.

How should the profession change?

Providing business advisory services for clients that directly benefit the bottom line, versus just accounting and tax services.

Favorite out-of-the-office activities?

I am a huge golfer and have been playing since I was 11 years old. I look at it as a game you cannot beat but can always get better at, and it requires a lot of dedication and mental focus. I feel that what I have accomplished on the golf course has made me a better CPA and allowed me to excel in my career.

Career advice:

Realize that the profession is more than debits and credits.

Biggest mistake by clients:

Too much focus on the day-to-day operations versus setting long-term goals and positioning their company to achieve their final goal, whether a sale or succession.

Life during tax season:

It is considerably busier but I feel that I have achieved a great balance. I get into work early around 7:30 a.m. and work until 5:30 or 6 p.m. and go home to have dinner with

my wife and put my 7-month-old son to bed. After dinner around 8 p.m. I will work for another three hours or so. I also work out two days a week minimum and feel that keeps my mind fresh and healthy during the stressful times of tax season.

— Joel Russell

Christopher Passmore, 40, began his career at Pricewaterhousecoopers, where he works with publicly and privately held businesses. He joined Martini, Iosue & Akpovi 10 years ago and was promoted to managing partner last year. He specializes in assurance and business consulting services to emerging and middle market companies, and focuses on manufacturing, professional services, franchises and benefit plans. He spends his free time with his family – his children are 7 and 10 – and he enjoys cycling and exploring southern California.

CHRISTOPHER PASSMORE

TITLE: Managing Partner

FIRM: Martini, Iosue & Akpovi, Encino

SPECIALTY: Assurance and business consulting to emerging and middle-market companies

HOBBIES: Charity, cycling and exploring Southern California with his family

Question: Why accounting?

Answer: I wanted to help clients grow their businesses and achieve their goals. The opportunity to become an entrepreneur also appealed to me. In accountancy, you can become a partner and run your own business – this is not possible in all professions.

Your role in the firm?

As the managing partner, I spend time planning and driving forward the firm's strategy. Which products should we develop and offer? Should we open new offices?

What defines "star accountants"?

It is a balance between the ability to apply

technical accountancy knowledge and the softer skills such as being an effective communicator and being able to empathize with your clients. I have always been good at communicating complex accounting concepts to clients who do not have an accountancy background.

Time management:

One third of my time is interacting directly with the firm's clients; one third managing the firm on a day-to-day basis; and one third on the firm's development.

Best part of your job:

Every client's business is like a puzzle. Sometimes you know that something is not right but the solution or missing piece is not always obvious. It is extremely satisfying when you figure it out.

Biggest misconception about accounting?

People often think that accountants do not need to have people skills. To be successful in this profession you need to be good with a calculator and have good client service skills.

Your personality at work:

I am told I am very calm and this helps me when dealing with multiple client deadlines. I approach projects step-by-step until they are completed.

New generation of accountants:

I have been inspired by the previous generation's work ethic and their willingness to go out and do what is needed to provide excellent client service. I think the main differences have been driven by technology. Today, we have more control as we can work remotely, we can provide more client tools such as online portals and data analysis programs, and we are being kinder to the environment by using less paper.

Memorable experience?

One of our clients started working with us 20

years ago with an annual revenue of \$1 million and a couple of products. Last year, they sold the business for \$1 billion with multiple product lines. That was a very proud moment for our firm.

How should the profession change?

I would like to see more focus on consultancy and working with the business owners to help them achieve their business goals. This means a move away from projects where compliance is the single goal, or the key aim is to submit a tax return on time. Accountants will still be meeting these deadlines and requirements, but they will also be working on mergers and acquisitions, implementing controls and constraints, and improving their client's approach to risk management.

Favorite out-of-the-office activities?

In addition to spending time with my family, I enjoy cycling and being outdoors. I am from Illinois originally, and I love exploring southern California. I am also on the board for Hope's Haven charity which provides support to children who are fighting a critical illness.

Career advice:

There can be pressure to specialize in tax, audit or consultancy early on in your career. Instead, try everything and get a broad range of experiences. I began my career as a public accountant and then became a controller in a manufacturing company. I returned to public accountancy with an entirely different perspective which has helped me understand and empathize with my clients.

Biggest mistake by clients:

The finance department often does not grow in line with the rest of the business. This means insight into business performance can be hard to come by, and without this insight it is difficult to develop future strategy.



Passmore: Client businesses are puzzles.

Life during audit season:

It is hectic but technology has made it easier for me to be there for my family. For example, I can spend some time with my children in the early evening and then work from home when they have gone to bed.

Accounting mentor?

Don Iosue, former managing partner, has been a huge inspiration and mentor. He has a business approach to everything, and he is interested in his clients' long-term goals and not simply their compliance requests. He also focuses on the people he works with, and develops his client relationships while making life at work better for his employees.

— Helen Floersh

STAR ACCOUNTANTS

As a tax partner, Elaina Kogan, 42, specializes in helping high net-worth clients manage and reduce their tax liability. She also works in the areas of tax compliance and planning. At Singer Burke, Kogan leads the tax team and likes to work closely with clients to solve taxation issues.

a person capable of multitasking, effectively communicating with a variety of constituencies, is adaptable to emerging technology, and maintains a desire to learn. My biggest “star skill” is measured by the success of my leadership within the firm and the trust established with our clients.

ELAINA KOGAN

TITLE: Tax Partner

FIRM: Singer Burke Zimmer & Butler, Encino

SPECIALTY: Helping high net-worth individuals with tax issues

HOBBIES: Travel, theater, dining

Question: Why accounting?

Answer: From a young age, I knew three things about myself: I excelled in math, I was going to work in an area where I could problem-solve, and I had a passion for business and entrepreneurship. As I advanced in my career, I concluded that my commitment to resolving problems using practical means and applications were going to be my strongest assets in any working environment. Accounting proved to be a natural fit.

Your role in the firm?

I am a tax partner. My servant-leader approach affords me the ability to work with creative and productive colleagues in a collegial environment. As a partner, I lead managers and staff to collectively plan, execute, direct and complete tax engagements for our clients utilizing a team approach.

What defines “star accountants”?

The term “star accountant” is associated with

Time management:

Each day is aimed to provide a high standard of service to our clients and staff. As a result of this goal, the time spent at work varies greatly depending on the need. Of course, there are established tasks like reviewing tax returns and tax planning that each of us engages in daily. However, today’s accountant is much more interpersonal and engaged in multiple aspects of the company.

Best part of your job?

Every day I get to work on a question or a situation that’s unique and different. My job provides the opportunity to learn new skills and expand my expertise. I also enjoy utilizing my role in leadership to develop our newer staff who are just beginning in the profession through guidance, support and training.

Biggest misconception about accounting?

Many have a perception accountants are nerdy and boring. Nothing could be further from the truth. Singer Burke is a diverse firm with people of many backgrounds who produce plays, build sandcastles and play softball. We are fun, athletic, creative and knowledgeable.

Your personality at work:

I am very organized, congenial and always set new goals. My personal characteristics translate well into my work environment, effectively meeting deadlines and addressing urgent client needs. I enjoy getting to know our clients in a



Kogan: Utilizes team approach to taxes.

way that works for us both so that my firm can customize a plan right for them.

New generation of accountants:

Technology and the internet allowed my generation of accountants to receive information from clients in minutes, streamline processes and increase efficiency. Our research and tax preparation software give us invaluable tools that allow us to analyze data and take advantage of tax planning opportunities rapidly. The result is a more accurate and efficient tax solution for our clients.

Memorable experience?

During a company’s “all hands meeting,” our managing partner told a story about a stonecutter while drumming on an African drum. It was remarkable because it was untraditional; however it was funny, memorable, reinforced our core values and defined the tone of our company culture – to provide a holistic view of the services

we provide.

How should the profession change?

I would like to see the role of technology continue to expand in the accounting profession. At Singer Burke, we do our best to utilize modern systems and software to bolster our ability to take on workflow and provide comprehensive analysis to clients.

Favorite out-of-the-office activities?

I travel, attend the theater and enjoy experiencing new ethnically authentic cuisines and restaurants.

Career advice:

A career in accounting is challenging, rewarding and engaging. I would encourage those considering a career in accounting to take any opportunity to learn and speak with those in the field, seek out internships or start taking classes to see if this is an industry that speaks to their natural skill set.

Biggest mistake by clients?

Some clients delay or refrain from making difficult decisions about taxes and finances. I would advise such clients to bring the matter to our firm’s attention as soon as possible so we may provide timely advice on important matters.

Life during tax season:

Hectic, but collaborative! Everyone is working long hours so there is a great sense of camaraderie. I make sure to take additional time to support my staff and ensure we provide accurate and timely solutions to clients.

Accounting mentor?

I credit my introduction to the tax profession to USC Professor Shiing-Wu Wang.
– Stephanie Henkel



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STAR ACCOUNTANTS

Prior to joining SRG in 1999, Tina Lazaroff, 48, worked in turnaround consulting, helping troubled technology and retail companies manage cash flow and pay down debt. Now she is the resident audit technical partner at SRG and provides perspective on emerging business issues and risks. As part of the in-house training program, Tina has conducted numerous seminars on accounting and auditing. She also serves on various committees within the firm.

TINA LAZAROFF

TITLE: Audit Technical Partner

FIRM: SRG, Encino

SPECIALTY: Consults on business issues and risks, trains other staff

HOBBIES: Reading, hiking

Question: Why accounting?

Answer: I took an accounting class as part of getting my undergraduate business degree (at California State University – Northridge) and found out I was really good at it. I love the challenge of getting the right number, and also discovered I am a very detail-oriented person. Those two traits are important in a good accountant.

What defines “star accountants”?

Firms are looking for people who can handle engagements from beginning to end – someone who has the technical skills and people skills to service clients and become trusted advisors to them. My biggest star skill is managing multiple engagements and seeking out the right resources for my clients and identifying opportunities – not just in compliance, but in their business operations.

Time management:

I spend significant time talking to clients in both phone and in-person meetings. I spend about half my time reviewing files, documents and other technical work, and then I do a lot of personnel and firm management work.

Best part of your job:

I like advising clients – getting to know their businesses, developing personal relationships with them. Being involved in sales and acquisitions and financing deals on the client-side is especially fun.

Biggest misconception about accounting?

That it is boring, or somehow we’re all math geeks. I actually enjoy the personal relationships with both clients and employees a lot more!

Your personality at work:

I am naturally outgoing and find talking to people fairly easy. Given that a lot of what I do is manage the client relationships now, it helps a lot.

New generation of accountants:

We embrace technology change a bit more, and we’re more likely to have come to the profession with different kinds of experience. For example, I was in turnaround consulting before starting at my current firm. I feel we might bring some real world business knowledge instead of spending our entire lives as a CPA. Also, the soft skills – people skills – are very important now for recruiting and retaining talent.

Memorable experience:

I had good meeting with a potential client in which we discussed his new business and accounting issues with respect to the business operations. I gave him some advice, promised a fee quote, and referred him to another profes-



Lazaroff: Client-side acquisitions are fun.

sional I know for legal advice. He called me back later that day and offered me the CEO position in his Company! I declined, but was very flattered. I ended up becoming his CPA, and we enjoy a great working relationship in that capacity.

How should the profession change?

I would love to see workflow improvements, less deadlines, less compliance work, and more creative business applications. I think the our generation of accountants has real work/life balance concerns and in order to create opportunities we need to focus on providing high-quality service while at the

same time making sure life outside the office can happen too.

Favorite out-of-the-office activity?

I love to read because sometimes I need to “get away” into another world. Losing myself in a novel set in another time and place is restorative. I also love to hike and exercise – my professional life has its fair share of stress, and I need the physical relief and to keep myself healthy for my children and my clients.

Career advice:

You are your career, no one place can make or break it, so find a good fit and learn all you can while there. Also, seek out mentors and always, always maintain your rolodex of past employers, work mates and valued clients.

Biggest mistake by clients:

Probably looking at price as the only metric in hiring professionals. I’ve seen over and over again where clients make mistakes because of bad advice from professionals who were the lowest quote for the services they got. I would say ask friends and other trusted advisors for referrals, and sit down with those referrals and see who inspires your confidence. Ask about their processes, and make an informed choice with price being only one factor. In my experience, you usually get what you pay for.

Life during tax season:

Tough – the work hours are demanding and can be very hard on my husband and children. I am just really not available to them at that time.

Accounting mentor?

Definitely my mentors here at SRG – Fred Solomon and Drew Grey. Both are great business people and creative thinkers as well as accountants.

– Mark R. Madler



Adams-Ings: Handles high-value divorces.

When facing a financially complex divorce, business partnership separation or business dissolution, clients turn to Jackie Adams-Ings, 47. She specializes in forensic accounting for family law litigation. Her work involves valuing businesses and analyzing standards of living, cash flow and income available for support, community property balance sheets, community/separate property, reimbursements, asset tracing and financial analyses. She testifies in court cases regularly on her findings.

Question: Why accounting?

Answer: I saw how well the partners of the

JACKIE ADAMS-INGS

TITLE: Partner

FIRM: White, Zuckerman, Warsavsky, Luna & Hunt LLP, Sherman Oaks

SPECIALTY: Expert testimony in financially complex divorces

HOBBIES: Family time

firm were living and wanted a similar lifestyle. That motivated me to enroll in college. I began with White Zuckerman (as it was titled) in January 1989 as a receptionist at 19. I have been with the firm for more than 28 years.

What next?

I went to school part-time at night for eight years and finally graduated from California State University – Northridge in 1997 with my accounting degree. During this time, I bought my first home and married my husband in 1996. After graduating, I worked on obtaining my Certified Public Accountant license and getting the required hours. I received my CPA license in 2003 after having two beautiful children, one whom is now about to graduate from high school. I have been a partner of the firm since 2008.

Your role at the firm:

I am a partner in the family law litigation department. During my years at the firm, I worked in almost every area of the internal business of the firm including receptionist, tax assistant, secretary, accounts receivable, and finally, billing manager. Additionally, I worked with our commercial litigation partner, Barbara Luna, and the family law department, where I ultimately became a partner. Working in all aspects of the firm has helped me understand every level of the busi-

ness from administrative duties to partnership responsibilities.

What defines “star accountants”?

The ability to rapidly digest and interpret client information and specifically case information in a family law matter to provide testimony in court.

Time management:

I spend time on the phone, in meetings with clients and on calculations.

Best part of your job:

Testifying in court and learning the specifics about each new divorce matter.

Biggest misconception about accounting?

Tax season – at least for me, as I do not have a tax season by specializing in litigation. But

provide us clients, and deal with the clients who are going through one of the worst phases of their lives – a divorce.

New generation of accountants:

Technology makes things easier.

Memorable experience:

Most memorable? Too many to count.

Favorite out-of-the-office activity?

Family and time with my kids!

What advice would you give to others considering a career in accounting?

Learn to balance between family and work. Schedule time for both.

Biggest mistake by clients:

Lack of documentation. My advice is to be better organized.

‘I do not have a tax season by specializing in litigation. ... I have the demands of meeting deadlines for the court cases I deal with.’ — JACKIE ADAMS-INGS

as a litigation specialist, I have the demands of meeting deadlines for the court cases I deal with, and those are similar to the rush and long hours associated with tax season.

Your personality at work:

I am outgoing and easy to talk to, thus I can communicate well with the attorneys who

Life during tax season:

Same as life not during tax season.

Accounting mentor?

The founding partner of our firm, Paul J. White, taught me the most over the years!

– Carol Lawrence

STAR ACCOUNTANTS

Matthew Sprague, 38, has over a decade of experience providing a variety of accounting, audit, and advisory services to both public and private companies. Matt serves a variety of companies across several industries and is a member of the firm's Financial Services Industry Practice, Private Equity and Venture Capital Industry Practice, and Manufacturing and Wholesale Distribution Industry Practice. In addition, Matt provides audit and consulting services to private equity firms, as well as to their portfolio companies.

MATTHEW SPRAGUE

TITLE: Senior Manager

FIRM: CohnReznick, Woodland Hills

SPECIALTY: Assurance for financial service clients

HOBBIES: Cooking, especially Thai and Indian dishes

Question: Why accounting?

Answer: I've had a passion for accounting since I took an elective accounting course during my senior year of high school. I knew accounting would offer a stable career with opportunities for growth. I went into public accounting to obtain my CPA license, absolutely loved it, and have not looked back.

Your role in the firm?

I am a senior manager in our assurance practice and am a leader in our financial service industry niche. I manage client relationships, train, mentor and develop our staff, network and engage in practice development activities. I also spend time recruiting the next generation of accountants at our local universities.

Valley connection:

I have deep ties to the San Fernando Valley. I

grew up in Burbank, received my accounting degree from California State University – Northridge (and love recruiting there still), and work in CohnReznick's Woodland Hills office. I've been able to excel in leadership positions in my firm, including my current role in the firm's partner development academy and as a team leader in the firm's strategic planning initiative. On a lighter note, I serve as the commissioner of our Annual Cornhole Tournament in the office.

What defines "star accountants"?

Being able to do it all! Having strong technical skills is almost a baseline expectation; you must also be creative, entrepreneurial, analytical and communicative. My biggest "star skill" is my ability to connect with people and through that connection form strong working relationships. I understand my clients' businesses and provide ideas and solutions to help them achieve and exceed their goals.

Time management:

Every day is different but I spend a significant amount of time managing client engagements, including working with clients, training and developing staff, and overall delivering world-class service to my clients.

Best part of your job:

Having the opportunity to work with a variety of businesses, clients and peers. I enjoy the exposure to different backgrounds and viewpoints, especially those that challenge my own.

Biggest misconception about accounting?

That accounting is boring! This profession is dynamic – accounting rules and auditing standards are constantly evolving – businesses and technology are constantly evolving – and we, as trusted business advisors, must stay on the forefront of these changes.

Your personality at work:

I'm pretty even-tempered, which helps in what

can sometimes be a stressful profession.

New generation of accountants:

We utilize technology so much more than previous generations. On a daily basis I am using analytical software, remote connectivity, social media and other technology as an integral part of my work.

Memorable experience?

My office is full of pranksters. Every April 1 is a new opportunity to create memorable pranks – or be the victim of them! One year we moved a co-worker's car to a different level in the parking structure, then asked him if he would drive us to lunch that day. He legitimately thought his car had been stolen and was surprisingly calm about it. We quickly fessed up and he was a great sport about it.

How should the profession change?

Continue the current trends surrounding increased investment in technology and creating flexibility for employees. I believe that technology will increase efficiency, which will in turn provide the much-needed flexibility to attract top-level talent to the profession in the future.

Favorite out-of-the-office activities?

I really enjoy cooking and entertaining – it brings out my creative side. I like experimenting with new recipes using seasonal ingredients, tweaking them to my own tastes. Lately, I've been making a lot of Thai and Indian dishes.

Career advice:

It can be a very rewarding career path but it requires dedication and hard work. Don't view the profession as a "job," but rather as your career and put in the necessary effort to succeed.

Biggest mistake by clients:

Not consulting your accountant in significant business decisions. A good accountant can advise you on a variety of business matters – everything from efficient tax planning and



Sprague: 'My office is full of pranksters.'

structuring to succession planning or even transition due diligence. In addition, accountants are a great source of referrals to other trusted advisors.

Life during tax season:

Busy! With a spouse in the same profession and two children, ages 5 months and 3 years, there is never a dull moment in my life. It is sometimes challenging during busy season to find that right work/life balance, but the flexibility outside of the busiest times of the year is outstanding.

Accounting mentor?

I definitely learned the most from the partners and managers that I have worked with throughout my career. Every single person has imparted knowledge to me whether they knew it or not. My mentor, Maier Rosenberg, has helped me grow into the financial services expert I am today.

– Mark R. Madler

A senior manager in Crowe Horwath's audit practice, Mark Demos, 36, specializes in auditing financial service companies. He's a bicoastal professional with experience in New York, Los Angeles and Michigan. He's often on the road.

MARK DEMOS

TITLE: Audit Senior Manager

FIRM: Crowe Horwath, Sherman Oaks

SPECIALTY: Audits for financial service clients

HOBBIES: Fly fishing

Question: Why accounting?

Answer: Accounting is the foundation of business. I realized in college that if I wanted to be successful in business, I needed to understand accounting. The deeper I got into my accounting courses, the more I realized that I really enjoyed it.

What defines "star accountants"?

The most successful companies today are innovators, and with innovation comes new accounting issues. Even the most experienced partners need to be willing to challenge themselves. When we stop challenging ourselves, we've stopped learning.

Best part of your job:

I love the dynamic nature of public accounting. I'm working with different teams, different clients and different accounting issues. I really enjoy the variety of challenges and people.

Biggest misconception about accounting?

The accountant stereotype. Most people assume accountants are "bean counters" who sit behind a desk and crunch numbers all day. In reality, public accountants are client-focused and spend time working one-on-one with clients and with the staff serving that client.

Your personality at work:

Most people would describe me as pretty calm. We work under tight deadlines, and a calming force on the team can really help to keep everyone focused on the task at hand, rather than the difficulty of the task.

Time management:

I don't spend all my time behind a desk crunching numbers. Some days I'm in my office taking calls from clients. Other days I'm in meetings in Los Angeles or in other parts of the country, or I'm in the field working directly with different teams and clients.

New generation of accountants:

My generation of accountants grew up with the hard-working values of the previous generation in a world that was changing. We have been able to leverage both of those worlds to understand the value of getting your hands dirty to really get things done, while using our understanding of the details to innovate new and exciting ways to do things more efficiently.

Memorable experience?

We work so closely in teams and on the road that there are more funny team moments than I can count. Some of the most rewarding experiences have been working with young startup companies and working with companies that are trying to clean up their books and get audit-ready for the first time. At the end of the audit, it is a great feeling to issue the audit opin-



Demos: Clients share fly fishing passion.

ion knowing that the audit team and the client put in the hard work to make it happen.

How should the profession change?

There is a lot going on with cognitive technology with endless possibilities for the industry. Development of new technology can help to make accounting and financial reporting more efficient, as well as help to create a more rewarding experience for those just entering the field.

Favorite out-of-the-office activity?

I'm an avid fly fisherman. I find it to be a great escape from the high-paced business environment and always return recharged. I also really enjoy finding common ground with clients in the experience. It is really rewarding to find a client or prospect who shares the

same passion for the sport.

Career advice:

Keep an open mind and try to keep the big picture in mind. Some of the greatest value in accounting comes from the new talent in the marketplace. A fresh perspective and fresh suggestions are factors that drive the profession forward.

Biggest mistake by clients:

My most successful clients view their CPA firms as part of the process, rather than a commodity. Including their CPA firm in the decision-making process can be quite valuable. We have diversified experience and can add value beyond audit and tax services when we're incorporated early and often.

Life during tax season:

It is no secret that tax season can be challenging. A vast majority of our work happens in a three- to four-month timespan. Work-life balance can certainly be a challenge during that time. However, it is a great time to further relationships with engagement teams and clients and it certainly is what gives this industry the flexibility of time the rest of the year, which I believe is one of the great perks of this industry.

Accounting mentor?

I've had the opportunity to work with a number of very experienced partners and clients. I've taken knowledge from all of them and used that to mold my approach to running engagement teams and offices. That is one of the great aspects of this profession. We get a chance to work with so many talented people and take the pieces that we find work best for us and use that to craft a personal style.

– Carol Lawrence