

CPA
Practice **Advisor**

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Accounting

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I think it is important for students to get involved in the profession through Associate organization memberships at the AICPA level and in their state, as well as in other professional networking groups that are dedicated to women professionals so that they can learn from what other women are doing that is bringing them success. Students can then take what they feel is most valuable from that learning and make it their own, adding to that their own unique talents and strategies. It is sad but true that there does still seem to be a ceiling for women at the top of the profession, but there are many women who have started their own firms that have become phenomenally successful, women are slowly breaking through those ceilings (for those that are committed enough to keep at it I am sure that it will someday happy).

Other women may choose to remain part of the profession but branch off in to advisory services or other specialty areas on their own or with established firms. I think it is most critical that women students build their own reputation and “brand” in the space and find their voice early on by seeking out speaking engagements and other ways to showcase themselves. There are many other suggestions I might make, but these are starting points.

What advice would you give accounting firms on things they could do to better retain and advance more qualified female staff?

Offer much more clearly defined job descriptions and sample career paths (traditional and non-traditional options)

Invite new/young staff to participate as part of internal employee advisory boards, giving them the opportunities to be the firm “technology champion” or perhaps assist with marketing, sales, and other areas so that they are helping to inspire

potential future partners and also help avoid driving staff away out of boredom and

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Do you think that there is still a glass ceiling in accounting firm senior management and partner levels, or that the profession has moved to a mostly gender neutral state?

Recent studies have shown that there is definitely still a ceiling in the largest firms, particularly in the CEO positions at the top 50 firms. I think that will increasingly change as current senior management and partners retire and the new generations move in to those positions. There of course has been an increase in the number of women in top positions with a growing number of firms on all sizes up through the large nationals, so I think it is only a matter of time. I definitely think the profession as a way to go before it will be gender neutral.

How have you managed to balance your professional and personal life obligations, whether that includes family, etc?

This is not an easy task at all, especially when you love the work that you do but of course know that family is most important. The days are too short! I try to make sure that I eat dinner with my husband on nights that I am not traveling so that we have time to talk, and that I schedule dedicated time with my family that includes “powering down” all of the work gadgets. I also try to take different family members with me when I am traveling to new and fun places for conferences, so they get to enjoy the experiences with me. We’ll tend to add a vacation day or two to the beginning or the end of the event.

How mobile are you regarding your work? How have mobile devices and apps impacted your productivity and work-life balance?

I am highly mobile. We closed our last “brick and mortar” office in April of last year. We have staff located in CT, NY, and CA as well as seasonal support in other states. We all work from home. I also travel about 16 weeks out of the year for work-related

conferences and consulting projects, and love that I can be on site for a conference

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online banking apps as well as Dragon Go! for dictating documents that I can easily edit and use on the go. I also keep up with my social media apps on the go! Skype is also a must-have on my iPhone and iPad.

What single piece of technology could you absolutely not live without, and why?

My iPhone. If I really had to travel for a week or two and live with nothing but my iPhone I really could now run our entire firm from that one device and complete client work as well. It is true that it is not always ideal to work from that little screen, but I could do it! I have 4 Mophie battery supply devices and one iSound bar that I travel with to make sure I will always have access to juice!

What is your favorite professional mobile app, and why?

Tallie (by SpringAhead) because it used to be a nightmare for me to track all of my receipts while traveling and then sync them up with my credit card, record my petty cash expenditures along the way, and track my mileage. With Tallie I just snap a photo of my receipts and then enter these other items and I'm on my way! No more paper craziness. Bill.com allows me to approve and pay my bills and also invoice my customers from anywhere which allows me to "work the way I live" and then I can access any of our working papers and other company and client documents from SmartVault. If I make a change to a SmartVault document I simply upload it back to the folder and my clients have realtime access as well. I can't ask for more than that! It allows me to feel that I never have to miss a business opportunity for fear of being disconnected from my business information.

What do you like to do when you actually have free time without any obligations to work or family?

I love to travel (love places that are great for snorkeling or anything ocean related as

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