CPA

Practice **Advisor**

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Education: BBA – Accounting/Finance – University of Texas at El Paso; Masters of Science in Taxation – San Jose State University.

Professional Associations: Accounting & Financial Women's Alliance (Past National President – 2011/2012); National Association of Women Business Owners; Vistage;

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for women in the accounting profession?

I would encourage college students to definitely pursue careers in accounting. There is so much to be learned in the profession, particularly in larger firms. Even if they don't ultimately stay in public accounting, the skills learned in those early years can lay a good foundation for many other career paths. "Accounting" has so many different facets – even beyond "audit or tax". It's about working with numbers, working with people, selling, and even marketing. Depending on a person's skillset or personality, there's something for everyone in this profession. I also believe that public accounting firms are trying harder than ever to address the imbalance of women at the top as well as addressing the work/life balance issues for both genders. I trust that we will see a day where 50% of partners in firms are women, but we have a way to go.

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

I would recommend to them to build and continually foster a mentoring program. Start young professionals (not just women) in the programs early. Women need to see others like themselves in leadership positions. Young women need evidence in their careers that they can reach for the top positions in firms – preferably by interacting with role models to whom they can relate. I believe that firms need to do a better job overall in retaining and promoting good women professionals – and then make every effort to keep them so that younger women can see the potential career path.

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?

I think that the profession is mostly in a gender neutral state. But I think that

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whether that includes family, etc?

I believe that work-life integration/balance is a very personal thing. It means different things to different people. In my work and life, I feel balanced overall. But on any given day, I might give more time and energy to my job vs. my family, or my community activities over my job, or my family over everything. I believe that if you measure it daily, you can go a little crazy. But if you measure it overall, big picture, and you feel balance, then you're good. I work very hard at my career, volunteer in the community, and serve on the boards of directors of my professional associations. I am proud that I can contribute and grow in so many different areas. However, there are some days that simply don't have enough hours. I'm lucky to have a very supportive husband and family that help me to be able to do all the things that I want to do. Sure, there are times when I feel overwhelmed, but most of the time, I'm excited and grateful for all the opportunities in my life. When things get too crazy, I do check out and relax – it may be a spa day, a trip out of town, or just a day to "play hooky" away from the office. I think it's important to regularly assess your personal balance. If you're out of balance for too long, you'll know it and probably be unhappy. Again, it's a personal choice and we each have responsibility for managing those 24 hours every day.

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

Since I am the President of my firm, I often work outside the office – sometimes from home, often at client locations, etc. I have structured our office so that I have the resources that allow me to remotely access emails, client files, and internal tools. I couldn't do my job without them. Some people talk about being "tethered by" technology. I don't view it that way. I believe that the technology allows me to be in

touch when I want to be and to be more efficient with my time. If I begin to feel

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What is your favorite professional mobile app, and why?

That's a tough question, because I have a few....each one of them important at any given time. Here's a recent favorite:

Dragon Dictation – allows me to speak into a dictation app. I'm currently writing a book (I've started by writing paragraphs longhand because I like the feel of pen on paper), and this app has been a great timesaver when I need to get the words off the paper on into the computer!

And an "old standby": FlightBoard – it's an app that shows flights departing and arriving at any airport, the gates of arrival or departure, and whether they are on time. Since I travel a lot, this information is very useful.

What do you like to do when you actually have free time without any obligations to work or family? (Examples: reading, wine and movies, tv, art, travel, exercise, cooking, etc).

Every morning I like to walk my dog, Zoey. It's a little quiet time before the craziness of the day begins, and we both enjoy the exercise! And on weekends, my husband and I like to cook. We also go out on our boat in the summer to float around, motor, or water ski. I love to travel. I do a lot of traveling for work, but I also love to explore different places recreationally – both in the US and internationally. Our last international trip was to Peru. Machu Picchu was amazing! And finally, I'm writing a book. It's called "Beyond the Staff Handbook" – it's a guide for young accounting professionals to navigate the first few years of public accounting. It's been "in me" for a long time and I'm finally releasing it. Look for it in 2014!

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