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**What are the key areas of your firm that have seen the greatest change/challenge in workflow over the past few years? (Or, what are the key challenges you see firms facing?)**

The greatest change we have seen in workflow over the past few years are the vast

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~~In what ways have you contributed to your firm, company to make it a better place?~~

I've implemented several key changes in the last year to make our firm a better place. First, I've realized that the main constraint to the growth of any organization is the leader. I've spent a lot of time developing my own skills as a leader to better support our team. In this endeavor I've adopted a new focus on training, incentivizing, and motivating our team which has resulted in doubling our productivity. We implemented a "paid to read" book club, provided systems which offer clear objectives, a more impactful measurement system, and rewards for top performance. Together we are developing a culture of high-performance leaders where positive relationships and the ability to make decisions is provided to each person regardless of their role in the company. We strive to build a thriving business that develops strong teams, improves our communities, and energizes our economy.

**In what ways do you participate in either the professional community or your local community to help others?**

In the last year, we've implemented a corporate responsibility program integrating philanthropy into our business model. Our program is based on a simple idea that if we can leverage our people, technology and resources we can improve more than 90,000 small businesses around the world through our efforts and influence. Each year we donate 1% of our time, product, and equity and encourage our members to do the same to improve our communities and promote compassionate capitalism. Some examples of our efforts include local beach cleanups, leading free financial education workshops for small businesses nationwide, participation in mentoring programs at SDSU, and monetary and book donations to non-profit organizations that support financial education such as SCORE and Junior Achievement.

## **What major changes do you foresee in the accounting profession of the near**

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### **How do you see yourself participating in shaping the future of the accounting profession?**

The most important thing we can do as advisors to shape the future of the profession is emphasize the value of the work we do with clients and charge what we're worth for our expertise. How will consumers know how to value our services if we don't tell them? One way I help in this endeavor is to educate CPAs on how to add value to their client relationships by implementing highly effective tax plans. Not only can you ensure that you offer the most proactive service, but you help small businesses grow and flourish, which drives our economy. As the public receives higher value, they *place* a higher value on our services which helps CPAs get paid what they're worth.

### **What is your career philosophy?**

Simply put: I love what I do. I come to work each day knowing that I'm making a difference. While some may gripe about the hours we spend behind a desk, I receive some of my greatest fulfillment from seeing the effects of what I do. Whether it is hearing from CPAs across the country who are transforming their practices every day, or from small businesses who are expanding and flourishing, I enjoy being a part of something greater than myself. As a career philosophy, it's the cliché "love what you do, and you'll never work a day in your life." I feel grateful each day for the opportunity to never work.

### **Not including your current employer, what company do you most admire and why?**

I really admire the company culture at Zappos. In a world where the bottom line is the most important metric, Zappos instead measures happiness as its most

important driver. I admire founder Tony Hsieh for not only “thinking outside the

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and personal growth. A very well connected business leader in San Diego, Felena has taught me to serve people first, and the business growth will follow. She has taught me the importance of building strong relationships, living in the moment, and asking for what you need to advance and improve. Without question, I would not be where I am today without this important role model in my life!

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Technology

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