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accounting profession. They are all active in the professional community, as well as in their local communities, where many are small business owners and employers.

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What is the name of one book that has been a great influence to you?

The first week I started my firm, Jim Metzler sent me a copy of YOU are the Value by

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In what ways do you participate in the professional community to change/improve the accounting profession?

I started my career at a large firm and have progressively worked my way down to be a small firm. I love being a small firm, and since I've had the opportunity to establish and grow a new firm, I have learned how to run a small firm on a boot strap budget while still delivering quality work.

Nothing that I have done has re-invited the practice management wheel, but I've been strategic in our processes and I want to pass along what I have learned to other smaller firms. To that end, my efforts have been focused on the American Woman's Society of CPAs (AWSCPA) and the AICPA's Private Company Practice Section Technical Issues Committee.

In what ways do you participate in your local community to help others?

Financial literacy across all socioeconomic groups is abysmal. Our society, schools, and community have not emphasized this topic. All of my volunteer efforts have been focused around teaching financial literacy in some form. The focus on teaching financial literacy is even embedded in my Firm's practice, and is one major reason why we only focus on the accounting, attest, and forensic needs for small-and-medium sized businesses.

I have volunteered my time instructing for these organizations:

- The Woman's Resource of Greater Houston, a financial literacy non-profit,
- OwlSpark, Rice University's Entrepreneurship Accelerator,
- TMCx, Texas Medical Center's Entrepreneurship Accelerator, and
- RedLabs, University of Houston's Entrepreneurship Accelerator.

This Fall I have also had the opportunity to teach a more in-depth accounting for

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

My clients are exclusively small and medium-sized businesses and non-profits with issues in segregations of duties and controls. I hope to contribute to the profession by teaching businesses accounting, financial literacy, and internal controls. I want to represent small and medium-sized businesses nationally. I want to be a voice for their limitations in accounting resources, and keep financial statements cost effective and meaningful.

What is your career philosophy?

I am a professional service provider, and in service everything is about service to those that support the business. Happy staff lead to happy clients, and happy clients lead to happy staff. I want to surround myself with those that enjoy doing what they do, are of high integrity, and have a good work ethic. I also like surrounding myself with people that don't think the same way that I do. I teach my entry level staff how to think about problems and come up with solutions, rather than teaching solutions. I want to do things the best way we can for our clients – not just my way. Many times it is my way, but many times it is not my way because one of my staff have a better solution. Those are very proud days for me.

Describe one person who has been an important mentor to you and how that person helped change your life.

I met Jim Metzler (former VP of the AICPA) several years ago while we were both speaking at a conference. We kept in touch over the years, and he was the 2nd call I made (after my Mom) when I was thinking about starting my own firm. I had a partnership offer that was not going to be quite the right fit for me, and I didn't

know what to do. Over the years, I knew he worked with a lot of smaller firms as the

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realize how much he was rooting for me to succeed. That first week, he sent me the YOU are the Value book with a great note, and I went through the workbook that first week. The time that I spent at the beginning of my practice focusing on what I was going to be doing, internal procedures, and methodologies has been the most valuable work I have done in order to develop myself and my Firm.

Jim has provided so much guidance to me over the past two years of starting my Firm. I truly don't know where I would be had he not helped me focus my vision at the very beginning, and had he not championed for me at every turn. He has been the difference in my career. Thank you, Jim!

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