

BEN SIMISKEY, CPA/PFS, CFP®

In this issue of *Today's CPA*, we spotlight **Ben Simiskey**, CPA/PFS, CFP® in Houston. He serves clients as director of wealth management at Stegent Equity Advisors, Inc. He is on TXCPA's Board of Directors, has served on several committees at the Society and chapter level, and recently finished his term as TXCPA treasurer. He now chairs the Strategic Planning Committee for both TXCPA and TXCPA Houston.


As part of his work with the TXCPA Strategic Planning Committee, he has been visiting chapter leaders and members across the state to gather input. A recent

all-member survey also collected feedback that will be used in the strategic planning process.

Additional opportunities for input are planned for the next few months and you'll be hearing more about the progress throughout 2020 as the committee continues to build the strategic plan for the next three-year cycle.

If you'd like to chat with Ben about the Society's strategic planning, you can email him at ben@cpadvisers.com or text him at 312-515-3107. You can also find him and connect on TXCPA Exchange or any major social media network (@BenSimiskey).





"I've been blessed by the decision to become a CPA. Every job I've had since and every significant professional opportunity has been made possible by my license."

– BEN SIMISKEY

In addition to providing wealth management solutions to your clients at Stegent Equity Advisors, Inc., you are an adjunct instructor at Rice University. What makes you so passionate about wealth management and planning?

I suppose it's appropriate I've been asked to be part of our strategic planning efforts, because I have a very planning-centric career and mindset. Even the class I teach at Rice is a tax planning course. At Stegent, I specialize in financial planning for sole decision makers – women and men who are widowed, divorced or single, or who are the primary caregiver for an ill or aging spouse. Planning during this period of time can be incredibly stressful and difficult but especially important.

As a single parent, I understand the need for support in the decision-making process when you're on your own. I've also seen it in the lives of family, friends and clients. Recently, I witnessed it in the life of my mom after we lost my dad to cancer in March. They had been married 53 years. That's not a void that can be completely filled but loved ones and professionals can help ease the burden. By acting as my clients' personal CFO, that's what I do for them. I help ease their burdens and support them in reaching their unique goals.

At what point in your life did you know you wanted to be a CPA?

Actually, someone had to persuade me to get my CPA license! That's strange to think about now but I had different goals at the time. After graduating with my bachelor's degree in Accounting from BYU, I was working in Deloitte's audit department in Chicago. At that time, I planned to go down the CEO career path and was going to pursue my MBA. I had even taken the GMAT and done campus visits.

Fortunately, I trusted the great mentors I had in my life who helped me to see that I should work for a couple more years before applying and, in the meantime, I should get my CPA license. Once I decided to go in that direction, I was all in. I passed all four parts of the CPA Exam on my first sitting and was off and running.

Years later, I can see how much I've been blessed by the decision to become a CPA. Every job I've



Why is volunteering in TXCPA and your community so important to you?

My parents taught us that “to whom much is given, much is required.” It’s remarkable how much most of us have been blessed with here in the United States. We’re incredibly wealthy – in far more than money. I think we have an obligation to share our talents and blessings with others.

But I also believe there’s a higher reason for volunteering than obligation. Ultimately, it’s about love and knowing what’s important to you. I decided a long time ago that I was going to make it a priority to always be involved in

organizations and causes meaningful to me. The most important areas of my life include my faith, family, country/community, profession and humanity. So, I include service in each of those areas in my personal strategic plan.

had since and every significant professional opportunity has been made possible by my license.

You’ve traveled around Texas the last few months to meet with members as part of the TXCPA strategic planning process. Did you learn anything interesting about Texas history you didn’t know before?

This great state has no shortage of history and I always learn new things during my trips. I grew up mostly in Texas and took Texas History in school, so I already knew a lot of the most common facts. When I can, I love going beyond those facts and digging into individual stories – how people got here, what life is like in their town, what their community means to them. Meeting so many of our chapter leaders I didn’t previously know or didn’t know well gave me a lesson in Texas history I couldn’t have gotten anywhere else.



Getting to know so many members and their communities has been enormously energizing for me and is vital to our strategic planning process. Our members have welcomed me into their chapters, their communities, their offices and homes. Texas is about community, and TXCPA is a powerful and unique community of its own.

None of us can do everything. But we can each do something. We can all make a difference in the areas most meaningful to us.

Tell us about your personal life and interests. What do you like to do on weekends or when you’re on vacation?

There’s nothing I enjoy more than being a dad. Most of my free time is spent with my boys – Noah (15) and Sam (13). We love sports and are usually either playing or watching. We also share a love for road trips. Over the past several years, our

road trips have taken us to all 48 states in the continental United States.

I’m also a proud Eagle Scout and enjoy camping and trying new things with my boys. Learning and living the Scout motto (“Be Prepared”) as a youth is what initially sowed the seeds of my passion for planning.