

December 2021/January 2022

**TXCPA**  
HOUSTON

# FORUM



## *Leading into 2022*

How to Hire Holistically and Train Out Interviewer Bias

Lessons from a Leader: Story Fruition CEO and Founder Melissa Reaves

Houston CPA PAC Special Year-end Contribution Offer

# Message

## from the desk of \_\_\_\_\_



**Kelly Hunter, CPA**  
*President*

I don't know about you, but I can't believe that we are already in December. Where did the year go? Times like these remind you that the world continues to march on no matter what is going on around us. With that being said, let's collect ourselves and march on with it. This issue of the Forum is themed Leading into 2022, and I can't think of a better theme.

As CPAs, we do our fair share of leading. Whether it is the companies we work for, clients we serve, students we educate and organizations we volunteer our time to, leadership looks different in almost every context, but the one constant is people. Leadership, by definition, is about followership. To be an effective leader, you have to treat those whom you expect to follow you with respect. How we interact with those we lead is the sole determinate in what can be achieved by the collective group, everything else is secondary. The most challenging part of leadership is helping leaders obtain the necessary skills to get the most from those they lead.

TXCPA Houston offers several opportunities for members to hone their leadership skills in a friendly and safe environment. We have 20 committees that are always looking for energetic new members to join, and eventually those new members progress into the vice-chair and chair roles, following in the footsteps of the leaders that came before them.

As I mentioned in a previous issue of the Forum, the CPA profession is very much an apprenticeship profession.

TXCPA Houston continues that spirit in the work we do with our committees. Teaming new members with veteran members who can provide knowledge and expertise to help develop everyone's skills is paramount to our success as an organization. With strong and capable leaders, we have a stronger profession that is highly respected, with members who are poised to succeed at all levels.

That is what we are all about here at TXCPA Houston, empowering our members to lead and succeed!

As always, we have several events in the coming months that are detailed in this publication as well as on our website at [www.txcpahouston.cpa](http://www.txcpahouston.cpa).

There is a good mix of social and professional events. I encourage you to sign up for one or more of these events so we can show you all the ways we are serving our members. We will continue to have virtual opportunities for as many of our in-person events as we can as to serve as many members as possible based on comfort levels. As a continued reminder, we also have over 20 committees that you can join to get involved, I assure you, there is a place for everyone no matter what your interest is.

We would love to have you serve and help shape our activities with your new ideas, expertise and energy.

A final reminder, we are here to serve every member, and we want to hear from you. Please reach out to me, the staff or any of our board members so we can get you the help and assistance you need and provide you with the resources that will help you on your journey of Leading into 2022!

## from the desk of \_\_\_\_\_



**Mark Allen, CAE**  
Executive Director

Journalist Doug Larson once wrote, "Life expectancy would grow by leaps and bounds if green vegetables smelled as good as bacon." After reading that statement, I began pondering about why so many things that are good for us smell more like turnips than bacon. For example, participation in retirement savings plans are woefully underused, 89 percent of Americans regularly exceed speed limits, and, to Mr. Larson's point, 74 percent of Americans are overweight. Why don't more of us opt for behaviors that benefit our finances, safety, and health?

One reason is that we fear change and learning new practices. Not knowing what's ahead or how it will affect us is scary. Leaders have the task of creating images in the minds of members, employees, clients, and other stakeholders that provide a clear direction and tangible benefits that will result from change. When leaders are able to get people excited about progress—and not merely change—they've mastered an important artform. After all, no one ever said, "We're making great *change*."

This issue of Forum includes at least two ways to distinguish progress from change. In *Story Fruition CEO and Founder Melissa Reaves*, Joanna Kresge describes how Ms. Reaves helps leaders communicate desired outcomes through storytelling, or specifically, by creating "mind movies." Describing compelling, real-life examples of how your firm has helped someone solve a problem or improve a situation is a highly effective way to build trust and overcome inaction. The stakes are even higher when dealing with a difficult subject such as improving an organization's inclusiveness. Barbara B. Adams presents specific techniques to help people leap from their current mindsets to more equitable practices when hiring new employees. End result: a more *progressive* organization and workforce.

Check out TXCPA Houston's upcoming webinars, seminars, and conferences described in this issue. The more facts leaders have about a strategic goal, the better armed they'll be when creating "mind movies" that get everyone involved charged up and onboard. Get to know members who have successfully improved their organizations through fun, relaxed social events such as a tour of holiday lights in historic River Oaks or community service events in December.

Be sure to take advantage of the many opportunities through TXCPA Houston to ramp up your knowledge and skills as a leader. What better way to bring home the—turnips?

## TXCPA Houston

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**OUR PASSION IS  
DOING *GOOD THINGS*  
FOR *GOOD PEOPLE***

# *WHAT IS YOUR PASSION?*

HERE ARE SOME OF THE PASSIONS WE HAVE HELPED MAKE POSSIBLE FOR OUR CLIENTS

- ▶ Maintain my lifestyle during retirement
- ▶ Provide educational opportunities for those less fortunate
  - ▶ Ensure that my grandchildren can be well-educated
  - ▶ Freedom to do more volunteering and ministry
  - ▶ Travel to all my bucket list destinations

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# Lessons from a Leader: Story Fruition CEO and Founder Melissa Reaves

By Joanna Kresge



## Start Any Presentation with a Story

People make decisions to buy or partner with you based on logical facts. "Does this make sense?" Your charts and graphs help solidify that in (the audience's) reasoning; however, humans make faster decisions emotionally. So, infusing stories into your presentation at the top of your speaking hooks hearts and seizes attention. (They) will remember your story far longer than any graph.

## Use Your Numbers to Add Value

If numbers dominate your world, you must then become a great storyteller. Money is emotional. Your job is to help (the audience) make sense of it — so do it through storytelling. (The statistics you use) can warn of troubled waters or be cause for trajectory celebrations.

## Your Slide Deck Also Tells the Story

Keep them simple. Every time you have people read a busy slide, you literally halt their active listening. Make your slides rich with images, not long sentences, words, and graphs. Don't let the slide upstage you.

## Build a Digital 'Story Library'

New employees can learn quickly if you have a library of stories for them. Customer success, your founder's story — your "Story Fruition" — milestones, and biggest wins and losses, all of these are stories that paint the culture of your company. When everyone tells similarly, you've just increased your sales force.

## Stories Show Us You

You have wisdom to share. Your life is packed with thousands of "a-ha" moments when you realized something and change. Those are your pearls. If a story bubbles up, it wants to come out. Jot it down. Work to structure it so that it shows transformation, and enjoy the reflection that the event brought you.



Joanna Kresge is the managing editor of 425 Business. [Lessons from a Leader: Story Fruition CEO and Founder Melissa Reaves](#) was originally published on October 5, 2021, on [www.425business.com](http://www.425business.com).



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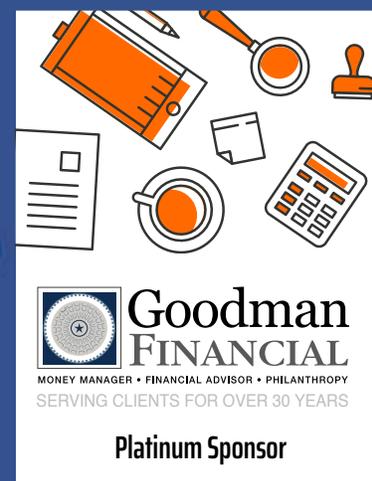
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or Livestreamed



Prepare for tax season at the TXCPA Houston Tax Expo on Monday and Tuesday, January 10-11, 2022, at the Houston Marriott Sugar Land Hotel or Livestreamed! This two-day conference provides practitioners with the updates and resources needed to prepare for tax season. Steven J. Tillinger, CPA, will launch this event by providing you with all the information you'll need to serve clients with confidence and clarity in his immersive Tax Update session. Tax Expo is the must-attend conference of the year for CPAs, EAs, and tax practitioners!

## What You Need to Know

### Dates:

Monday, January 10, 2022, and  
Tuesday, January 11, 2022

**Location:** Sugar Land Marriott Town Square  
(or Livestreamed)

**Session Times:** 7:00 a.m. - 6:00 p.m. (Central Time)

**CPE Hours:** 22 hours

**Prerequisite:** None

**Level of Instruction:** General Knowledge

### Pricing:

Member/Non-CPA or  
other chapter member: \$400

Non Member: \$500

### Trending Topics

- Year-end Tax Update
- Reality Based Investing
- Tax Planning in 2022
- Business Structure
- Diversity & Inclusion Hiring Trends
- Sales and Use Tax
- International Tax Compliance Tips
- State and Local Tax Implications
- Digital Contingency Plan & Cybersecurity
- Employment Law

[Click here for the full agenda!](#)

## Sessions Led by Dynamic Speakers



Nima Farzaneh, JD, LL.M.  
Cryptocurrency



Tina Parmar, CPA  
IRS Practitioner Suite



Charles P. Rettig, JD  
IRS Commissioner



Steven J. Tillinger, CPA  
Tax Update

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# How to Hire Holistically and Train Out Interviewer Bias

By Barbara B. Adams, PsyD

For legal reasons, most job descriptions from US-based companies contain well-intentioned but misguided words that read something like this:

*Employment by [insert name of company] is based on merit, qualifications, and competence. Applicants will not be discriminated against on the basis of race, color, religion, sex, gender identity, national origin, age, physical or mental disability, veteran status, sexual orientation, or any other status protected by applicable federal, state, or local laws.*

These words depend upon the idea that recruiters, hiring managers, and others involved in the process of selecting new employees will not see race or disability, will not discriminate based on age or gender, and will make fair, objective, and unbiased hiring decisions. In fact, companies will insist that they hire only the best person for the job and that their decisions are based solely on merit, skill, and ability. **But how, exactly, is "best" measured or determined? Subjectively, that's how.**

Substantial research on how unconscious biases affect our actions confirms that **our perception of "color-blindness," "gender-blindness," or "age-blindness" is actually blatantly false.** Today the typical interviewing process calls for job applicants to convince an interviewer that they're a good "fit" for the organization. The burden is placed on applicants to address unspoken biases and convince the interviewer of their skills, ability, values, and desire to

do the work. Many CPA applicants have the necessary knowledge of financial and accounting procedures. But to achieve more holistic results, the interviewer should also bear the responsibility of discovering how the applicant's differences add to the diversity of the workforce. This can only occur if inclusion is a core, embedded value in the organization.

## Preventing Interviewer Bias

In 1970, women made up only 20% of all new hires by America's major symphony orchestras. Many people didn't believe that women had the lung capacity to play large wind instruments. Today, most symphonies hold blind auditions with potential candidates performing behind a screen so that judging panels can better make unbiased assessments based on the quality of playing alone. Since blind auditions began, the proportion of women hired by major symphony orchestras has doubled from 20% to 40%.

Businesses would do well to model this approach in their hiring practices. Interviewers could, for example, create environments—like pods—so applicants cannot readily be seen. Interviewers could also use voice synthesizers to keep gender or ethnicity hidden. Finding creative ways to control interviewing conditions, essentially holding blind auditions, could help prevent bias in hiring decisions.

At companies such as Blendoor, an inclusive recruiting and people analytics software firm, **names, photos, and dates of**

**job applicants are hidden on resumes specifically to mitigate unconscious bias in hiring and to accelerate the identification of qualified candidates.**

Organizations truly committed to diversity take action and leverage services like these. Imagine if the proportion of talented, qualified people we hired doubled the diversity in our workforces.

Large financial firms that receive hundreds or even thousands of job applications each day commonly use so-called *predictive analytics* to cull through large amounts of data and identify candidates for roles. To develop a multifaceted workforce, we need to understand the impact of these tools by answering the following questions:

- Was a diverse group included in the development of the tools?
- What analytics does a particular tool predict?
- Are our hiring criteria truly fair?

**If we examined the success of our current talent base, we'd find data only about our homogeneous workforce.**

And data we might have, like SAT scores or IQs, is often not correlated with a person's ability to be successful at a job. Where is the data on measuring different populations? The hiring criteria that companies continue to use have not sufficiently developed teams that include women, African Americans, Latinos, or disabled people—in other words, anyone who isn't young, male, and either white, Asian, or Indian. **The use of nontraditional solutions to**

recruiting, hiring, and retention is absolutely essential if we are to succeed in developing a diverse workforce.

## Practicing Holistic Hiring

Think about qualities and characteristics—nontraditional strengths—you would ideally want to see in your workforce. Find ways to evaluate your candidates for these strengths. Create a framework for recruiting and hiring new people that's holistic in approach. **Knowledge, skills, and abilities (KSAs) certainly matter in hiring, but the kind of person the candidate**

**is matters even more.** Unusual questions such as "Tell me about the last three books you read" and "Would the people who know you well describe you as empathic, sympathetic, or compassionate? Why?" will help deepen your perspective. The goal here is not to judge but to gain insights into the whole person beyond the standard KSAs.

## Asking Good Interview Questions

What might holistic hiring look like for companies that want to create a diverse, inclusive workforce?

Let's explore this process using the

technology industry. Tech companies often hire for math, computing, coding, and other specialized talents. They commonly use interview questions that test for cognitive ability and structured, logical thinking capacity. But the questions they ask should also provide a larger, more holistic view of who the applicant is—are they empathic, culturally competent, and able to connect with others in ways that stimulate people's innovative thinking and ideas?

The questions may sound difficult to create, but consider these:

- "Give me an example

of a time when, in spite of great pressure, you didn't go along with a group decision at work. How did you feel? Did others accept your choice?"

- "Which is more important to you: Valuing differences among people or valuing commonalities among people? Why?"
- "Tell me about a time when you had to manage conflict in a multicultural group."
- "How comfortable would you be reporting to someone of a different race or

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gender?"

- "Give me an example of how you show respect to women at work."

Think about what kind of organization you're trying to create and the characteristics and emotional competence you want employees to have. Then, experiment with a variety of behavioral-based interviewing questions until you land on a set that works well for your company. There is no formula for designing good questions to ask applicants, except perhaps to experiment, learn, and continually improve. Also, of course, stay within legal limitations with your questions.

Devising and asking good interview questions not only takes work and preparation but also requires courage. Be prepared for surprised looks or even negative reactions. We are, in a sense, rocking the boat and changing what people are accustomed to because the downside of asking the same interview questions we've always asked is that our hiring practices perpetuate the same homogeneous workforces and environments that have held our companies back.

**There's a saying that goes "What we permit, we promote."**

During the hiring process, organizational leaders must model and communicate expectations for mutual respect and appreciation to people both inside and outside the company. They need to be leaders who hold workers accountable for fostering an environment of acceptance and understanding. Internally, this will involve addressing the issue of employees who lament that bringing in diverse hires means "lowering the bar" or

choosing someone "lesser" for the company.

**One thing leaders and hiring managers can do is model something called appreciative inquiry (AI), which is an approach to managing change that focuses on identifying what works well in a company and then doing more of it, as compared to focusing on problem-solving.**

Appreciative inquiry is a creative, positive approach to hiring, and it's yet another way to help reframe our thinking about our organization's approach to diversity and inclusion. Janet Cottrell, Senior Director of Academic Resources and an associate of the Center for Appreciative Inquiry at Champlain College, lays out an iterative approach to hiring using AI:

- Beyond the traditional knowledge, skills, and abilities (KSAs), identify what key values are essential for the job. Ask, "How do our company's values match up with this candidate's values?" and "How might our company's values evolve if this candidate joined the team?"
- Adjust your thinking about the search process. Instead of eliminating candidates from the larger pool, keep them in the pool for as long as possible. Ask, "What do we want to learn about this candidate?" and "What would this candidate bring to the team?"
- Seek success with every candidate. Treat each person as though you want him/her to succeed. Ask, "How can we showcase this candidate's strengths and attributes?"



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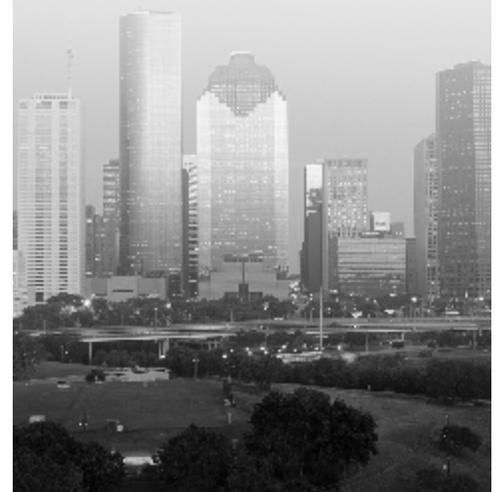
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and "What kind of impression are we leaving with this candidate?"

In applying the appreciative inquiry approach to hiring, you show employees how to shift their thinking from looking at what's missing on a resume to instead noticing all the assets a candidate has to offer.

We should be aware of the false presumption that there is an actual, objective, predefined bar against which we can measure candidates. The hiring process is dramatically more subjective than scientific. We know that interviewees are rejected all the time for simply not seeming like they'd be a great fit for a company's culture. But a candidate declined by one company often makes an excellent hire for another. **The so-called bar and who clears it actually says more about a company and its hiring managers than it does about the candidates applying for a given role.**

If our goal is to develop a truly sustainable, progressive, diverse, and inclusive workforce, we have

to rethink and fundamentally recreate our hiring processes and systems. We should not only focus on the procurement of skills but also experiment with nontraditional ways of finding and hiring great talent.

Looking forward, we also need to consider the hard and soft skills that will serve our companies well. The Institute for the Future in Palo Alto, California, researched and compiled a Future Work Skills 2020 report, identifying critical skills individuals will one day need in order to succeed in environments of rapid change. The report, though originally published in 2011, remains relevant today and has profound implications for business and technology, especially as the report pertains to our own strategic workforce development and planning. Its list of critical skills includes:

- the ability to determine the deeper meaning or significance of what is being expressed
- the ability to connect to others in a deep and direct way, to sense and stimulate

reactions and desired interactions

- proficiency at thinking and coming up with solutions and responses beyond those that are rote or rule-based
- the ability to operate in different cultural settings
- the ability to work productively, drive engagement, and demonstrate presence as a member of a virtual team

Ask yourself what your company or organization really needs. Question your assumptions and keep in mind that if your hiring patterns are skewed toward talent exclusively, your own actions could effectively and dramatically impede the diversity of thought and experience within your company. Consider how much your corporate progress could be enhanced by the collective differences of your employees. The key is in seeing diversity as a driver of innovation, then working toward that reality.



Dr. Adams is the Founder and Chief Learning Officer at GAR (Gender, Age, Race) Diversity Consulting. She specializes in organizational development and workforce diversity.

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# Houston CPA PAC Special Year-end Contribution Offer

By Steve Goodman, CPA, CFP®

When everyone else is hurrying to get in their year-end charitable deductions, CPAs have an opportunity to make a difference and support their profession with a non-deductible contribution to the TXCPA PAC.

## THE NUMBERS

In 2020 we all rose to the occasion and Houston met its goal of \$43,364 in CPA PAC contributions. We were so successful that our goal was raised to \$55,287. But unfortunately, there is bad news. Midway through November 2021, we are only at \$21,460. While a change in the PAC measurement year to end in March will allow us an extra three months, or 15 months in total to hit the goal, we are only halfway towards what we accomplished in the twelve months of 2020. That is not to say that many folks haven't already contributed. In fact, 189 members have made contributions, of which 143 were for \$100 or more, some contributing \$1,000.

## THE NEED

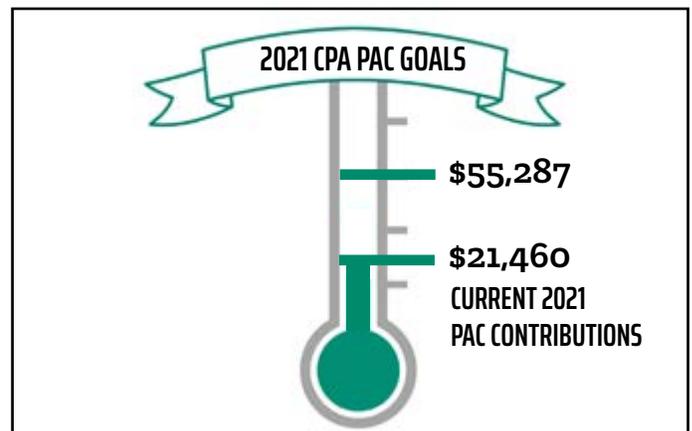
Why is the CPA PAC so important? Funds are used to assist legislators who have been friendly to our profession and the business environment in which we operate. Given that 2022 is an election year, we need to start early and need greater participation in the CPA-PAC. When the TXCPA PAC supports legislators, they return our phone calls, they welcome our visits, they remember us, and they listen to us. It is via that access that TXCPA has had tremendous legislative success.

The steady support we provide to CPA-friendly legislators is greatly appreciated by those elected officials. Our profession is counting on us, as are our clients and employers.

## THE OFFER

Contribute between now and December 31, 2021, and your contributions will be matched by a local member up to a total of \$5,000. Don't leave this offer on the table. Take advantage of it now.

It is easy to participate. You can do so now via <https://bit.ly/TXCPA-PAC>, which after signing in, allows for a one-time contribution or for you to set up a pledge to make annual, semi-annual, quarterly, or monthly automatic contributions. Alternatively, checks are welcome too, simply mail them to the TXCPA. Contributions from Houston members will be credited to our chapter, with 75% of the funds going towards local races. With your help, we hope to celebrate 2021 as a banner year for the CPA-PAC.



Steve Goodman, CPA, CFP® is the Founder and President of Goodman Financial Corporation which was registered in 1989. As President, his responsibilities include firm management, and maintaining client and firm relationships. For more information, visit [www.GoodmanFinancial.com](http://www.GoodmanFinancial.com).

# The Scholarship Extravaganza: A Time to Renew Friendships and Lift Spirits

By Carol Spencer

This year's 1920's-themed Scholarship Extravaganza celebrated something even bigger than fundraising for accounting scholarships and CPAs Helping Schools reading and STEM programs. It was a long-awaited chance for members and guests to come together in person, have fun catching up with each other, and acknowledge what the CPA profession can accomplish when it works together.

Carol Warley, the night's honoree, is a shining example of the extraordinary efforts individuals have taken to nurture new and upcoming CPAs, provide information to keep the profession protected and moving forward, and help colleagues thrive. Members and sponsors contributed over \$150,000 to support education for future CPAs and community students.



## Winners, Winners, Winners!

Gala attendees danced the night away to the party sounds of Rock n Robin and played roulette, poker, craps, and blackjack. Those upon whom Lady Luck smiled were able to enter prize drawings. These attendees took home fabulous prize packages:

- Laura Gomez (Astros/Panama package)
- Mary Faris (Wine package)
- Nhu Le (Gardening package)
- Carolyn Miles (Wine package)



Big Board bidding returned with a vast array of items this year. Successful bidders were:

- Michelle Mullen (Use of a Costa Rica luxury condo stay)
- Sheila Enriquez (Texas package)
- Mark Lee (Carabbas package)
- Calvin Upton ("Light of Freedom" Thomas Kincaid framed lithograph)

Congratulations to these winners and to those who successfully bid on dozens of items in the Silent Auction!

Many thanks to Carol Warley, Dan Russell, Mark Lee, the Scholarship Extravaganza Committee, the CPAs Helping Schools Committee, staff, and others who contributed to the success of this year's gala! And thank you to all sponsors and everyone who purchased gala tickets!



# Year-end Giving

By Carol Spencer

## University Students

Opportunity does not always come knocking. You must get up, search for your future, and move mountains to realize your dream.

Many scholarship applicants fit into this mold. They come from humble beginnings and know they want to make a difference in the lives of their families, their communities, and their chosen profession. For most students, finances are a constant worry. TXCPA Houston Foundation continues to help as many Houston-area students as possible.

You can help them realize their dreams and become established members of the accounting community.

The TXCPA Houston Accounting Scholarship Committee realized a change was needed to fulfill the needs of local accounting majors as they work towards the



150 hours required to sit for the CPA exam. In 2022, scholarship recipients graduating in December 2022 will receive \$2,500 for the Fall semester tuition. Scholarship recipients who are graduating in Spring 2023 will be granted \$5,000 for two semesters.

These funds allow students to reduce their workloads and concentrate on their studies to obtain their master's degrees.

## Elementary & Secondary School Students

CPAs Helping Schools Committee provides funding to

local campuses, grades PreK-12, for funding of educational programs, with a focus on reading and STEM/STEAM. Committee volunteers review grant applications in December and April, with final approval granted by the TXCPA Houston Board of Directors. Schools receive funds for the following semester and provide feedback and success reports to the committee.

Make your year-end holiday gift to one, or both, of the charitable entities of the 501(c)(3) Houston TSCPA Foundation. Tomorrow's business leaders and potential employees will thank you for your support.

[Click here](#) to donate funds online or mail your check to TXCPA Houston Foundation | 777 Post Oak Blvd Suite 500 | Houston, TX 77056.

For information on either program, contact Carol Spencer at [cspencer@txcpahouston.cpa](mailto:cspencer@txcpahouston.cpa).

A group of seven professionals (four men and three women) in business attire standing in a modern office setting. The text 'westwoodgroup.com' is in the top left. The slogan 'Your Values. Your Influence. Your Legacy. Our Advice.' is at the bottom. A vertical caption on the right reads: 'From left: Chris Rowell, Shelitha Smodic, Susan Wedelich, Leah Bennett, Jason Caras, Karla Dominguez, Greg Casamayor'.

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# 2021 - 2022 Nominations for TXCPA Houston Recognition Awards

By Carol Spencer



CPAs are laughingly referred to as “bean counters” and everyone has a mental picture of how a CPA, or any accountant, should appear. As our human culture is diverse in so many facets, the same is true of the profession.

## How do you describe a CPA?

A CPA is buried in tax return filings for weeks and months on end. A CPA spends hours reviewing financial data for an audit. A CPA connects with clients and potential employees, as well as with the golf ball on the green. A CPA is an educator. A CPA is a friend. A CPA is trusted. A CPA is someone you want on your side in a battle. A CPA is Confidential, Professional, and Astute.

## How you define a CPA is different, based on your own Comprehension, Perception, and Attitude.

Members are the lifeblood of any organization. When called upon, TXCPA Houston members rise to the challenge. Whether it is helping neighbors and community after a natural disaster, offering aid to those in need, providing volunteer or financial support during a crisis, or mentoring a fellow member on their climb up their corporate ladder, you and your fellow members are there for others.

As we arrive at the new year, we reflect on this year of new challenges and successes. It is important that we pause to recognize our members who have given their time and articulated their visions to TXCPA Houston in 2021 - 2022.

You are encouraged to submit nominations for those members, including yourself, who you believe have excelled this year. There are many categories but not enough for all 7,000 members!

## Categories include:

- Significant Contribution by a Member in Public Practice
- Significant Contribution by a Member in Industry
- Significant Contribution by a member in Education
- Significant Contribution by a Student Member
- Significant Support of the Society by a Firm/ Company
- Award that Fits No Other Category
- Distinguished Service to the Profession
- Distinguished Public Service
- Outstanding Committee Chair
- Outstanding Committee Member
- Outstanding Young CPA of the Year
- Outstanding CPA of the Year
- Outstanding CPE Event
- Outstanding CPE Award
- John B. Harrison Award for Community Service
- Stan and Margaret Voelkel Contribution to Education
- Rookie of the Year
- Special Recognition

[Submit your nominations here!](#)

Chapter leaders will review the activities and accomplishments cited in the nominations, then select those who they believe are most deserving of recognition. Award recipients will be acknowledged in May, perhaps at the customary annual awards dinner. Caution remains and while hopeful and all-too-ready for a fun in-person event, proper care will be taken to ensure the utmost safety and health of the members.

If you have any questions concerning the recognition awards or general membership, please contact Membership Manager Carol Spencer at [cspencer@txcpahouston.cpa](mailto:cspencer@txcpahouston.cpa) or 832-831-9232.



Accelerate is the TXCPA Houston professional development and networking program, begun in 2013, to connect future leaders. From the first class of six CPAs, the program continues to grow and fourteen professionals completed the recent four-week course. Now the program includes non-CPAs such as attorneys, financial advisors, bankers, and enrolled agents. Accelerate requires a desire to build your leadership skills in conjunction with understanding how best to communicate with those working with you. If you want to have your name added to the roster of 132 "Accelerators," look for program information in the second quarter of 2022. You can become one of the eighteen who have moved up to TXCPA or TXCPA Houston Board of Directors or Committee leadership.

Applicants should have at least six years of full-time work experience after graduation to be considered.

### CONGRATULATIONS TO THE 2022 ACCELERATE CLASS!

Wesley Adams, CPA

Rayyan Anees, EA, CFP®

Jennifer Brock-Utne, JD

Yvonne Cheng, CPA

Whit Groves

Phyllis Joe, JD, LLM

John Jones, CPA

Shannon McCain, CPA

Dahlia Nguyen

Eny Ogwurike, CPA

Ugo Onwudiegwu, CPA, JD

Cason Peters, CPA

Angela Qian, CPA

Morgann Zimmer, CFP®

## TXCPA HOUSTON CAREER CENTER



### LOOKING FOR A NEW OPPORTUNITY?

**Visit the TXCPA Houston Career Center to Find the Job That's Right for You!**

Employers and recruiters can access the most qualified talent pool with relevant work experience to fulfill staffing needs. Job candidates can access the most successful and rewarding companies to invest their skills and talents in.

**Recruiters:** Target your recruiting and reach qualified candidates quickly and easily.

**Job Candidates:** Post your resume to all employers, even confidentially and get job alerts sent to your inbox.

[Click here](#) to access the TXCPA Houston Career Center today!

# Chapter News

## 2022-2023 TXCPA Houston Nominating Slate

Members nominated below will be presented at the upcoming virtual Annual Business Meeting on January 13, 2022 from 5:30 - 8:30:00 p.m. Voting will open on Friday, December 10, 2021, and close at noon on January 12, 2022. [Click here](#) to vote online.

### TXCPA HOUSTON (CHAPTER)

#### Candidates for TXCPA Houston Officers

**President-elect:**

Adam Dimmick

**Vice President:**

Tim Adler

**Secretary:**

Danielle Supkis Cheek

**Treasurer-elect:**

Brad Elgin

#### Automatic Seats per Bylaws

**President:**

Charlotte Jungen

**Treasurer:**

Katherine R. Rodriguez

**Immediate Past President:**

Kelly Hunter

#### Candidates for the TXCPA Houston Board Directors

Mohammad Al-Kawafha

Rolando Garcia

Kelly Higginbotham

Baria Jaroudi

Sheryl Jimerson

Michelle Mullen

Kenneth Omoruyi

Nina Perez

Manu Sadiev

Tracy Tyler

#### Automatic Seat per Bylaws

**Immediate Past President:**

Kelly Hunter

#### Continuing TXCPA Houston Board of Directors

Brian Alberts

Wade Egmon

Harvin Lawhon

Geri Pacheco

David Dyer

Tami Preece

Sable Waters

Rubik Yeriazarian

#### Candidates for the TXCPA Houston Nominating Committee

Austin Carlson

Carol Hahn

Pauline Le

Tonja Rodriguez

Ramsey Womack

#### Automatic Seats per Bylaws

**Chair:**

Kelly Hunter (Immediate Past President)

**Vice Chair:**

Adam Dimmick (President-elect)

### TXCPA BOARD OF DIRECTORS (STATE)— HOUSTON SEATS

#### Candidates for the TXCPA Board of Directors

Brian Alberts

Kelly Higginbotham

Adam Dimmick

Patrick Durio

Bill Frazer

Felicia Farrar

Phillip Arvanetakis

Kelly Hunter

Tami Preece

Sable Waters

#### Continuing TXCPA Board of Directors (term expiration year)

Tim Adler (2024)

Billy Atkinson (2024)

Austin Carlson (2024)

Brad Elgin (2024)

Harvin Lawhon (2024)

Michelle Mullen (2024)

Lisa Paulk (2024)

Katherine Rodriguez (2024)

Tonja Rodriguez (2024)

Casey Stewart (2024)

Carol Warley (2024)

Barry Wilkin (2024)

Rubik Yeriazarian (2024)

Mo Al-Kawafha (2023)

Robert Allen (2023)

Chris Breaux (2023)

Danielle Supkis Cheek (2023)

Wade Egmon (2023)

Sheryl Jimerson (2023)

Kenneth Omoruyi (2023)

Kathy Ploch (2023)

Ramsey Womack (2023)

#### Automatic Seat per Bylaws

**TXCPA Houston President:**

Charlotte Jungen

### Houston Annual Meeting of Members

January 13, 2022

5:30 - 8:00 p.m.

The Briar Club

[Register here!](#)

# Chapter News - Membership Events

## Did You Know?

All good things must come to an end. TXCPA Houston's office lease expires in April 2022, and WE ARE MOVING!

Yes, TXCPA Houston will enjoy new office space effectively on April 30, 2022.

After 43 years "Outside the Loop" we are moving back "Inside the Loop." Don't worry – we aren't going far and you'll enjoy visiting the new location for meetings, continuing education, and socials!

Watch your emails for a Save the Date for the Summer Open House at the new location at 1233 West Loop South.



The graphic features the TXCPA Houston logo in the top left. To its right is a red 3D figure holding a puzzle piece above its head, with a group of blue 3D figures standing behind it. Below the logo, the text reads: "You're invited!" followed by a horizontal line, "MEMBER OPEN HOUSE", "January 5, 2022", "5:00 - 7:30 p.m.", and "TXCPA Houston Training Center".

For now, register for the Winter Open House:

Wednesday, January 5, 2022

Time: 5:00 – 7:30 p.m.

Location: Houston CPA Society offices

Address: 777 Post Oak Blvd., Suite 500

- Food
- Beverage
- New Member Recognition
- New CPA Recognition
- Door Prizes
- Meet Committee Members
- Learn about volunteer opportunities

[Click here](#) to register!

## Holiday Spirit

### Mister McKinney's River Oaks Christmas Lights Historic Tour Bus

Monday, December 13 at 6:30 p.m.

Depart from the Whole Foods Market at 2955 Kirby Drive (at Alabama). Arrive at least 15 minutes prior to the bus tour departure. Bring your favorite beverage, but NO GLASS CONTAINERS. Mister McKinney, Houston's TOP historian, will share the history of River Oaks...the people that live in the mansions and the history of how the 1924 neighborhood came to be! Fee: \$40 per person, refundable until 72 hours prior to tour.

[Click here](#) to register for December 13.



Maybe you don't want a guided bus tour but prefer to use your own pedal power!

If you're under 40, you can join the **YOUNG PROFESSIONALS COMMITTEE** on a **River Oaks Christmas Lights Pedal-Party Tour!**

Wednesday, December 15 at 7:00 – 9:00 p.m.

The River Oaks Christmas Crawl will begin and end at the corner of Westheimer and Bellmeade Stree, near the CVS River Oaks, located at 2910 Westheimer Rd.

Dress comfortably and appropriately for bike pedaling!

Bring your ID – Pedal Party is a 21+ experience!

Young Professionals Committee is providing light snacks and beverages. Fee: \$10 per member.

[Click here](#) to register for December 15.

# Chapter News - Upcoming Conferences



## TXCPA HOUSTON CONFERENCES

### Tax Expo

January 10-11, 2022 - Hybrid  
Houston Marriott Sugar Land

The conference will equip CPAs and tax practitioners with the updates and resources needed to prepare for tax season.

*If you have 6 or more individuals attending from your firm, there is a 10% discount. Email [reporter@txcpahouston.cpa](mailto:reporter@txcpahouston.cpa) for group registrations.*

### Spring Accounting Expo

May 2022

Location to be announced

Join accountants and financial decision-makers for a two-day event focused on the future of accounting. Learn up-to-date information on technical topics, technology, economic updates, and management skills.

### CPE by the Sea

June 15-17, 2022

Galveston Convention Center

Network with top CPAs, gain valuable insights covering all professional areas of interest, and enjoy the Galveston attractions at this three-day conference that mixes business with pleasure.

**REGISTER at [www.txcpahouston.cpa](http://www.txcpahouston.cpa)**

## SPONSORSHIP OPPORTUNITIES

CPAs play an integral role in their companies' important decision-making processes. Becoming a sponsor is a great way to engage these influential accounting professionals. There are many upcoming events for you to take advantage of.

Sponsorship benefits vary and levels start at \$500. If you are interested in becoming a sponsor for an upcoming event, contact TXCPA Houston at [kondracek@txcpahouston.cpa](mailto:kondracek@txcpahouston.cpa).

Thank you to corporate sponsors for making 2021 possible!

### THANK YOU TO OUR CORPORATE PARTNERS

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Exceptional People for Complex Situations

#### Bronze



CREATIVE FINANCIAL STAFFING

#### Friends of the Chapter



APP COMPUTING

# Chapter News

## CPE CLASSES, CONFERENCES & STUDENT AUXILIARY EVENTS

CLICK LINKS  
BELOW TO REGISTER

Date	Course	Hours
12/08/2021	<a href="#">Goodman Financial CPE Workshop (In-Person)</a>	8 hours
12/08/2021	<a href="#">Individual Income Tax Update, Blaise Bender (Virtual)</a>	8 hours
12/09/2021	<a href="#">Employment Law (Virtual)</a>	1 hour
12/10/2021	<a href="#">Cybersecurity Rules and Regulatory Compliance (Virtual)</a>	1 hour
12/14/2021	<a href="#">Federal Tax Update, Steven J. Tillinger (Virtual)</a>	8 hours
12/15/2021	<a href="#">Six Things Your Client Needs to Know About Selling Their Business (Virtual)</a>	1 hour
12/16/2021	<a href="#">Northwest Roundtable - Mr. Productivity Mark Struczewski (In-person or Virtual)</a>	3 hours
12/16/2021	<a href="#">Ethics: It's a Matter of Choice, Deanna Sullivan (Virtual)</a>	4 hours
12/16/2021	<a href="#">Goodman Financial CPE Workshop (In-Person)</a>	4 hours
12/17/2021	<a href="#">Time to Get Fit for 1099 Season (Virtual)</a>	1 hour
12/17/2021	<a href="#">SAUX - IDEA Fundamentals (Virtual)</a>	N/A
01/05/2022	<a href="#">It's a Brand New Year, Invest in You? (Virtual)</a>	1 hour
01/10-11/2022	<a href="#">Tax Expo (In-Person or Virtual)</a>	22 hours
01/12/2022	<a href="#">Federal Tax Update, Steven J. Tillinger (Virtual)</a>	8 hours
01/12/2022	<a href="#">How to Pass the CPA Exam in Just 3 Months (Virtual)</a>	N/A
01/17/2022	<a href="#">Federal Tax Update, Steven J. Tillinger (Virtual)</a>	8 hours
01/20/2022	<a href="#">Ethics: It's a Matter of Choice, Deanna Sullivan (Virtual)</a>	4 hours
01/20/2022	<a href="#">Northwest Roundtable - Tax Updates (In-Person or Virtual)</a>	3 hours
01/25/2022	<a href="#">Individual Income Tax Update, Blaise Bender (In-Person)</a>	8 hours
01/26/2022	<a href="#">Business Income Tax Update, Blaise Bender (In-Person)</a>	8 hours
01/28/2022	<a href="#">SAUX - Advisory: Putting it all Together (Virtual)</a>	N/A
02/08/2022	<a href="#">Federal Tax Update, Steven J. Tillinger (Virtual)</a>	8 hours
02/08/2022	<a href="#">Individual Income Tax Update, Blaise Bender (In-Person)</a>	8 hours
02/09/2022	<a href="#">Business Income Tax Update, Blaise Bender (In-Person)</a>	8 hours
02/11/2022	<a href="#">SAUX - Changing Lanes: Alternatives to Public Accounting (Virtual)</a>	N/A
02/16/2022	<a href="#">Federal Tax Update, Steven J. Tillinger (Virtual)</a>	8 hours
02/17/2022	<a href="#">Ethics: It's a Matter of Choice, Deanna Sullivan (In-Person)</a>	4 hours
02/25/2022	<a href="#">SAUX - F is for Fraud: Investigating Forensic Accounting &amp; Valuations (Virtual)</a>	N/A

## TXCPA Group Billing Program Offers Perks

Group Billing offers additional benefits including 20% discount on select TXCPA CPE events, a non-CPA affiliate membership, and a complimentary 30-day job posting on TXCPA's Career Center. TXCPA is committed to helping the organizations that employ our members leverage those membership investments to support organizational goals for success. If you would like to participate in the Group Billing Program or ask any questions, please email Leslie Gambrell at [lgambrell@tx.cpa](mailto:lgambrell@tx.cpa).

## December is TXCPA Month of Service

TXCPA's Branding and Community Outreach Committee has identified financial literacy as a focus area for service and education during TXCPA Month of Service. The CPA profession is well positioned to provide guidance and support for helping Texans build stronger financial foundations. Help us increase our impact in December with your participation. Check TXCPA Houston's Weekly News email for local engagement opportunities, or [click here](#) to learn how you, your firm or your company can participate in TXCPA Month of Service.

## Depression Knows No Season

"This is supposed to be a joyous time of year, yet I feel angry one minute and plunged into despair the next. What's wrong with me?" You might be suffering from depression. ACAN, the TXCPA Accountants Confidential Assistance Network, offers confidential assistance. Call us at 866-766-ACAN. *All we want to do is help. All you need to do is call!*

## Nominations for B&I Award

TXCPA is accepting nominations for the 2021-2022 B&I Award through **December 31**. The award recognizes CPAs who work in business and industry and have made significant contributions through their influence and impact on others in the accounting profession. [Click here](#) to submit your nomination.

## TXCPA Now Accepting 2022 Rising Star Nominations

TXCPA is setting out to recognize CPA members 40 and younger who have proven to be rising stars within the accounting profession and their communities. Do you have an up-and-coming star in your firm or company who has shown innovative leadership qualities, whether it be in the accounting profession, TXCPA or charitable activities? Have a friend or colleague who's taken the reins within the profession or community? We want to hear from you! Anyone can nominate a rising star, but the nominees must be TXCPA members. Nominations must be completed by **December 31** to be considered. [Click here](#) to submit a nomination today.

## Midyear Board of Directors and Members Meeting

The Midyear Board of Directors and Members Meeting is January 21-22, 2022, at The Westin Irving Convention Center at Las Colinas, Irving. Attendees will hear updates on important TXCPA strategic plan initiatives, the 2022-2023 Leadership Slate will be presented, AICPA Chairman Bill Pirolli will present on **Friday, January 21**, and members will have the opportunity to participate in round table discussions with their peers. [Register here](#)

**BECOME A MEMBER TODAY**

Visit [www.tx.cpa/membership/become-a-member](http://www.tx.cpa/membership/become-a-member)

**JOIN TODAY!**



# Classifieds

## LET ACCOUNTING PRACTICE SALES, THE LARGEST MARKETER OF CPA PRACTICES IN NORTH AMERICA, ASSIST YOU

We understand your concerns and respect your confidentiality. Contact us for a FREE, no-obligation valuation of your firm. Buyers, for additional information on any of the listings below, contact us by email [Holmes@APS.net](mailto:Holmes@APS.net), by phone (888) 847-1040 or visit our website [www.APS.net](http://www.APS.net).

Featured Practices for Sale (gross revenues shown):

- North Houston CPA \$1.7MM, \$575K
- NE of Houston CPA \$567K
- West Houston CPA \$1.1MM, \$340K, \$250K
- NW Houston CPA \$588K, \$291K
- SE Texas CPA \$283K
- Corpus Christi Area CPA \$189K

## PART-TIME BOOKKEEPER WANTED

Church is in search of a part-time bookkeeper responsible for accounts payable and receivable, processing payroll and conducting other tasks related to finance. Software ACS Church. Resumes can be sent to [welcome@saintphilip.net](mailto:welcome@saintphilip.net).

## CPA PRACTICES FOR SALE

The **Accounting Practice Exchange** is the online marketplace for CPA practices. Get the latest opportunities via our free weekly email alert service. Sign up at [www.accountingpracticeexchange.com](http://www.accountingpracticeexchange.com).

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Business: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Get involved with TXCPA Houston by serving on committees important to you. Please check your top three committee(s) based on interest.

### CPE Related Committees

Quality control and oversight of Society CPE

- \_\_\_\_\_ CFO/Controllers Conference
- \_\_\_\_\_ CPE by the Sea
- \_\_\_\_\_ Tax Expo

### Membership Related Committees

Work on Society image enhancement, career awareness and member services

- \_\_\_\_\_ Membership Development
- \_\_\_\_\_ Young Professionals

### Industry/Other Committees

Plan topics, serve as on-site coordinators for industry CPE

- \_\_\_\_\_ Business & Industry
- \_\_\_\_\_ Energy
- \_\_\_\_\_ Healthcare

### Professional Services Committees

Plan topics, serve as on-site coordinators for CPE

- \_\_\_\_\_ Accounting & Auditing
- \_\_\_\_\_ Forensic & Valuation Services
- \_\_\_\_\_ Personal Financial Planning
- \_\_\_\_\_ Circular 230 Practitioners Roundtable
- \_\_\_\_\_ Northwest Roundtable

### Charity/Civic Related Committees

Sponsor community and organization events

- \_\_\_\_\_ Accounting Scholarship Endowment
- \_\_\_\_\_ Accounting Scholarships
- \_\_\_\_\_ CPAs Helping Schools/
- \_\_\_\_\_ Accounting Career Education
- \_\_\_\_\_ TXCPA Houston CPA-PAC
- \_\_\_\_\_ Public Affairs
- \_\_\_\_\_ Scholarship Extravaganza

## Thank you for signing up!

Your active participation will provide: current topic updates, professional development, networking opportunities ... and more!

You will be placed on the distribution list for each chosen committee. Committee meeting dates vary from monthly to quarterly. Please email this form to [cspencer@txcpahouston.cpa](mailto:cspencer@txcpahouston.cpa) or [click here](#) to complete the form online.

# TXCPA HOUSTON

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