TXCPA HOUSTON

FORUM



Shift/Forward: Redefining Leadership with an Inclusive Approach

Member Spotlight: Huandong 'Mary' Faris, CPA, and Jonathan Gibson Balancing Authority & Collaboration: How Leaders Drive Accountability Throughout The Organization

Message

from the desk of

Hello, busy season, my old friend. You snuck upon us once again! To all my friends in public accounting, it is the most exciting and most stressful time of year. Many love the adrenaline rush of the deadlines, demands, and pace of work, which is why they got into this crazy CPA world and continue to be in it. For my industry friends, your busy season is more spread out during the year, with many other deadlines throughout the



Kelly Hunter, CPAPresident

year. For my education friends, you have a whole different set of deadlines and benchmarks. The one thing we all have in common, besides the CPA license, is that we all count on people to work together to perform the important and necessary work to achieve our goals.

As people are the backbone of our profession, it is imperative that we strive to ensure that there are no barriers to entry, no barriers to promotion, and no barriers to leadership in our profession based on lack of diversity and inclusion. The title of this issue of the Forum is Diversity and Inclusion: Leadership Speaks Louder Than Words. This is a profound statement that is of paramount importance. No longer can we talk the talk; we have to walk the walk.

I'm proud to say that TXCPA Houston has made tremendous strides in our diversity and inclusion initiatives that were started long ago, but we still have a long way to go. As an organization, we implemented an overarching initiative to do our level best to make every decision with diversity and inclusion at the top of our minds. Not every decision made has been as successful as others, but we will continue on this path with no end in sight. We have assembled a diverse and inclusive board of directors, roster of committee chairs, vice-chairs and members, staff, and volunteers. We continue to add to those respective groups with people representing all types of individuals, groups, interests, and personal beliefs. We serve a diverse group of members, and our leadership should reflect that fact.

As I mentioned above, we have made significant progress in many diversity and inclusion initiatives but have a very long way to go. The leadership of TXCPA Houston is committed to continuing this vital work to ensure that our current and future leaders represent our diverse current and future members. We continue to attract new diverse members to keep our pipeline full to achieve these goals. We have a very active membership development committee that has an equally active diversity and inclusion subcommittee that has monthly meetings. These groups work together very diligently to attract the most diverse membership possible. I encourage you to become involved with either or both groups; we most certainly need your perspective and passion to help us achieve our goals. Working together, all things are possible.

As always, we have several events in the upcoming months that are detailed in this publication and on our website at www.txcpahouston.cpa. Please click here to find an event or meeting that interests you. We would love to serve and help shape our activities with your new ideas, expertise, and energy.

A continued reminder, we are here to serve each 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 through 2022 and beyond!

Message

from the desk of.

"The real death of America will come when everyone is alike," wrote James T. Ellison. The fact that he was a gangster who died in 1920 after being committed to an asylum does nothing to diminish the relevance of his statement in today's business world. By now, we've all heard that diversity, equity, and inclusion are more than "the right thing to do." Organizations that have implemented significant and



Mark Allen, CAE
Executive Director

effective DEI initiatives are more likely to experience higher employee productivity, better employee retention and loyalty, and positive employee morale than companies that are late to the DEI party.

Let's face it. NO ONE thinks they are non-inclusive or unfair to minorities. And yet, we've all inherited beliefs and traditions that unintentionally threaten to exclude people. Have you ever gravitated toward a job candidate because he or she graduated from the same college as you? Have you ever assumed that an older person doesn't know how to use technology? Would you be more comfortable hiring someone with the last name of Jones rather than Dong-Geun?

Take note, employers! In her recent TXCPA Houston Tax Expo session, employment recruiter Jennifer Dean noted that many prospective employees expect their future employers to proactively recognize and advance minorities and others who have been traditionally marginalized during and after the hiring process. When virtually every CPA firm struggles to find qualified employees, DEI is not a subject that can be ignored. It is a crucial step in being an employer of choice.

If that's not compelling enough, Ms. Dean also presented evidence that diverse organizations get in hot water less often than less diverse companies. Why? A diverse group is more likely to tag unintended yet inappropriate conduct, practices, or language that may go unnoticed in a less diverse group. Using a whimsical example, a 14-year old boy may find it inconceivable that anyone would dislike the latest Marvel movie. Thus, his decision to take his 80-year old grandmother to the said movie may not end well. Getting input from people in her age group would better equip him to make a better choice for a grandmother/ grandson movie-going experience.

TXCPA Houston is dedicated at all levels to addressing inclusivity and diversity. We encourage you to help the Chapter move forward by participating in its monthly Diversity & Inclusion Subcommittee meetings. Currently, the group is planning two-panel discussions on May 19 at its Spring Accounting Expo in May. We need your perspective! Reach out to Mark Allen, TXCPA Houston Executive Director, at mallen@txcpahouston.cpa.

TXCPA HOUSTON

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WHAT IS YOUR PASSION?

- 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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Shift/Forward: Redefining Leadership with an Inclusive Approach

By Janet Foutty, Chairman and CEO | Deloitte Consulting LLP Terri Cooper, Chief Inclusion Officer, Deloitte Shelley Zalis, CEO, The Female Quotient

Today's Workforce Is Calling For New Leadership

The inclusion landscape for organizations has evolved dramatically. Even within the last year, expectations, conversations, and workforce needs have significantly changed. No matter where they are in their inclusion journey¹, organizations are struggling now more than ever to cultivate a diverse and inclusive environment for their people.

Actions speak louder than words when it comes to diversity and inclusion. From previous research², Deloitte discovered that much of today's workforce prioritizes inclusion as an experience instead of a purely programmatic solution. People want their leaders and peers to display inclusive behaviors on a daily basis. While effective programming is important, many people wanted to feel included in their teams, on their projects, and in everyday interactions.

This is a major challenge for organizations. How can organizations influence what are often highly personal experiences? A crucial factor is the behaviors modeled by leaders: "The behaviors of leaders (be they senior executives or managers) can drive up to 70 percentage points of difference between the proportion of employees who feel highly included and the proportion of those who do not." This inclusion challenge facing leaders inspired Deloitte and The Female Quotient to re-examine the role that leadership plays in advancing inclusion in organizations today. First, we explore what today's workforce sees as the impact of inclusion in their organizations and for their careers. Second, we examine the role that leaders can play in advancing inclusion and what specific traits today's workforce is seeking from leaders.

Today's workforce is demanding change. They want to be part of organizations that advance inclusion and see leaders playing a critical role in fostering that culture. But to meet these expectations, leaders need to view inclusion as a distinct leadership skillset to be developed and prioritized, as well as rethink the traits and behaviors they exhibit on a daily basis.

With expectations for advancing inclusion continuing to evolve, redefining what leadership looks like today should be a crucial imperative for organizations seeking to engage talent, inspire innovation, and thrive in the future.

- 1 Deloitte. 2018 Human Capital Trends (2018).
- ² Deloitte. Unleashing the power of inclusion. (2017).
- 3 Deloitte. Eight powerful truths. (2018).

To Advance Inclusion, Actions Speak Louder Than Words

The business case for inclusion is clear. Less clear is whether inclusion programs and initiatives are actually achieving their intended purpose. We wanted to learn whether inclusion initiatives and behaviors were actually being embedded into organizations, embodied by leaders, and positively impacting the experience and day-to-day performance of talent and teams.

We asked today's workforce how they were experiencing inclusion on a daily basis, how this was impacting their work, and whether inclusion efforts were enabling them to advance in their careers. We conducted a survey of over 5,000 respondents across the US in a range of different organizations and industries. Respondents reported that they often interpreted the message of inclusion as an organizational value. Yet, many believed that inclusion is not treated as a critical business issue. Fifty-five percent of respondents agree that inclusion is discussed within their organization, but rarely acted upon. While organizations may recognize the need for inclusion, some have faltered when it comes to enacting it and embedding it in their people's experiences.

Q: How much do you agree or disagree with the following statements about your current workplace?

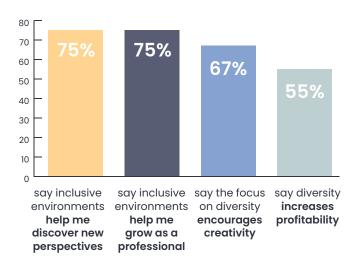
A: "Inclusion is discussed but rarely acted on."



Inclusion Drives Performance

When asked what specific values inclusion brings to the workplace, many respondents reported that inclusive environments help them discover new perspectives and grow as a professional. The majority also stated that diversity encourages creativity and increases profitability.

The majority of respondents said that diversity and inclusion positively contributed to their experience in the workplace



Q: What have been the biggest accelerators helping your personal career advancement?



Our research discovered that for many, an inclusive culture is a crucial component for a sense of advancement. Respondents identified acceptance as an important aspect in their career growth. Today's workers want to be embraced for who they are and what they bring to the table. They want their distinct perspective to be heard. They acknowledge that acceptance and inclusion benefit their experience as well as the organization as a whole.

Second, respondents noted the importance of advocacy. Having strong relationships and a sense of community can be critical. They want to know that their leaders will have their back and lean in when difficulties arise. Finally, today's workers feel that being authentic has been one of the biggest accelerators for helping their personal advancement. This finding is consistent across our research, but remains elusive for organizations to grasp. Respondents desire a workplace that values who they are, invites people to bring their true selves to work, and rewards authenticity.

LEWIS CHAN, SENIOR CONSULTANT, DELOITTE CONSULTING LLP

Lewis Chan began his career in the UK, but always knew that diversity and learning about other cultures would be critical for his growth. He spent two years working in Switzerland before moving to the US. He sees exposure to different environments as an essential component of his development: "That cultural understanding can be huge, both for your career, but also for your personal growth." Lewis's appreciation for inclusion and the ability to be culturally intelligent has continued to increase with each new experience that he's had. "I've been given so many valuable experiences to interact with a diverse mix of people, not just in terms of race and gender, but also background and perspective. That's the stimulation that I need to be successful."

At a time when the output of the workforce is increasingly difficult to measure and innovation is the ultimate competitive edge at the forefront for organizations, today's workforce reports that an inclusive culture can play an integral role.

In an era when organizations are continuing to see new and different ways to attract and engage talent, an inclusive culture could be the differentiator that today's talent is looking for. But, they aren't satisfied with organizations simply claiming that inclusion is a value. They want to experience it in their everyday interactions and view it as a crucial aspect to their development and a fundamental driver of inspiration. To truly embody what inclusion means and how it's experienced in organizations today, today's workforce is often looking to leaders to set the tone and redefine leadership to meet their expectations.

Leadership For A New Era

There have been countless studies on the benefits of diversity and inclusion, yet today's workforce is still reporting that there is a gap between organizational rhetoric and their experiences. So, where does this disconnect come from? Many leaders know the right things to say to convey a commitment to inclusion, but are still stumbling on how o advance inclusion through their everyday behavior. Our Shift/Forward research tackles this question head on.

We asked respondents to assess what leadership means today. 72 percent indicated that we needed a new definition of what a "leader" is in today's world. This finding was also consistent across all company sizes and industries, as well as ethnic, gender, and age groups.

Q: How much do you agree with the following statement?

"We need a new definition of what a leader is in today's world."



Reevaluating Leadership

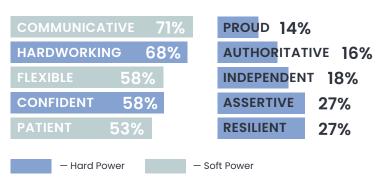
In Six Signature Traits of Inclusive Leadership, Deloitte identified a shift in expectations and needs in an era when inclusion continues to grow in prominence. Deloitte discovered what distinguishes inclusive leaders from their counterparts:

- Commitment: Treat everyone with fairness and respect, foster environments where team members can be themselves by modeling authenticity, and empower each other's wellbeing.
- Courage: Engage in tough conversations when necessary. Identify opportunities to be more inclusive, take ownership and engage others.
- Cognizance of bias: Be aware of unconscious biases so decisions can be made in a transparent, consistent, and informed manner.
- Curiosity: Listen attentively and value the viewpoints of others.
- Cultural intelligence: Seek out opportunities to experience and learn about different cultures and be aware of other cultural contexts.
- Collaboration: Create teams that are diverse in thinking.

Through our recent survey, we took these findings one step further. We recognize that these characteristics require a balance of different types of leadership traits.

Soft and hard power was first discussed by scholar and former Harvard University Dean

Q: What do you believe are the most important values to make a good leader?



Joseph S. Nye Jr., who stated, "We recognize that these characteristics embody both soft and hard leadership traits... In the business world, smart executives know that leadership is not just a matter of issuing commands, but also involves leading by example and attracting others to do what you want."⁴

To determine what qualities are most important in today's leaders, our research asked respondents to rank the traits identified based on what they feel is needed from leadership today.

Hard and Soft Power Traits

Results revealed that today's workforce is seeking a balance. When respondents were asked to select the most important values that make a good leader, the top five traits they identified were a mix of hard and soft power: three are soft power traits — being communicative (71 percent), flexible (58 percent), and patient (53 percent), while the other two are hard power traits — hardworking (68 percent) and confident (58 percent). It indicates that workers are seeking a balance and complement of different traits when it comes to effective leadership.

HARD POWER	SOFT POWER
Ambitious	Authentic
Analytical	Collaborative
Assertive	Communicative
Authoritative	Empathetic
Confident	Flexible
Hardworking	Intuitive
Independent	Loyal
Proud	Passionate
Rational	Patient
Resilient	Selfless
Straightforward	Transparent

⁴ Joseph S. Nye Jr. "The Benefits of Soft Power," Harvard Business School. (2004).

With several simple principles, emerging and seasoned leaders can shift their leadership style forward to unlock growth opportunities across their organizations.

Inclusion as an Experience

Inclusion is a priority for many in today's workforce. An organization's inclusive environment often influences decisions about which companies they will consider joining and whether they decide to stay. It also can determine how they perceive their daily experiences. Today's workforce often expects leadership to foster an environment where different perspectives can be shared and where they can grow as a professional. They see diversity as a catalyst for creativity and profitability. Today's workforce views inclusion as fundamental to their experience, as well as essential to the way organizations conduct business today.

But many in today's workforce are not satisfied with just hearing about inclusion. They want to experience it.

Strike a Balance

Today's workforce is looking for leaders to set the tone. Their expectations are not simply for leaders to proceed as they always have, but to evolve the definition of leadership overall. Our research found that:

- Today's workforce values more than hard power alone
- Respondents seek leaders who are transparent and communicative
- Empathy, authenticity, and openness in leaders can inspire inclusion
- Respondents had a greater sense of opportunities in their organizations when leaders demonstrated hard and soft skills



Today, leaders should consider:

- Modelling authenticity: Sharing stories, being vulnerable when appropriate, and inviting others to do the same
- Communicating transparently: Discussing their perspective and being open, but also being an active listener and inviting other voices and perspectives to the table
- Investing in relationships: Getting to know their team, fostering an environment where strong relationships are valued, being an advocate, and showcasing acceptance
- Evolving constantly: Continuing to learn, grow, and develop new leadership traits, and constantly holding themselves accountable for advancing inclusion

<u>Click here</u> to read the original report published on The Female Quotient's website.

Deloitte.



The Female Quotient, in collaboration with Deloitte, created the Shift/Forward: Redefining Leadership with an Inclusive Approach to examine the role leaders play in operationalizing inclusion in the workplace. Shelley Zalis, CEO of The Female Quotient, is an internationally renowned thought leader, movement maker, and champion of equality. She is a pioneer for online research, becoming the first female chief executive ranked in the research industry's top 25. Today, as CEO of The Female Quotient, Zalis works with Fortune 500 companies and impact organizations to advance equality in the workplace. Republished with permission.

The Powerful Unrealized Gain

By Gil Baumgarten



Investors' tendencies toward self-harm are well known. We exit losing positions to chase winners, and we shift into trends after years of outperformance, virtually assuring we've missed the upside. We also tend to equate percentage gain with dollar gain, although the two are only partially linked.

Most investors I know would prefer a wowing 5-year set of annual returns like +18%, +18%, +21%, +20%, -21% to a boring +10%, +10%, +10%, +10%, any day. The simple average of the wowing set comes to +11.2% despite underperforming the 10% set in actual dollars earned. This is due to compounding; the weight of the 21% loss in the fifth year eludes the eye, but the glittery returns entice!

Along with mental miscalculations like these, today's zero commission landscape gives some investors the perceived green light to chase anything flashy. But the friction of the process is far greater in other ways. I have heard tales of meme stock investors with \$10,000 portfolios and fully reasonable \$5,000 tax preparation fees. Some of those same investors owe tax bills larger than their portfolios due to wash sale rules they never understood. That's the friction of the process.

The bigger a portfolio becomes, the more important it is to control these friction points. Being intentional about managing for unrealized gain evolves to the forefront of wealth management

priority. This is even more acute for older investors and those with charitable leanings since unrealized gains are tax-free at any owner's death and when donated. Separately, long-held unrealized gains add an element of compounding even if you do ultimately sell and pay the capital gains tax. Simply deferring tax from lack of transactional activity can add a fourth to dollar returns over time. Add in the compounding with the step-up in basis rule, and an unrealized gain is often 60% more valuable than a realized gain.

Adding to the confusion is the fact that paid taxes do not impact percentage performance in performance measurement software while significantly hindering dollar growth. For example, a \$1 million gain in a \$4 million portfolio might have a \$238,000 pending tax bill based on whether it is sold or not. If sold at year-end and taxes paid from the account, the remaining \$3.76 million invested afterward would generate the same percentage return next year regardless of starting amount. But those dollars lost to taxes would have generated dividends and growth as well if left alone and possibly tax-free as described previously.

These are several reasons to consider portfolio construction methodologies designed to improve overall performance and to help investors focus on dollar return, not mesmerizing and fleeting percentages. After all, when retirement rolls around, they can only spend dollars.

Photo: Canva.com



Gil Baumgarten is a 37-year veteran of the investment industry. In 2010, Gil left the brokerage world to start Segment Wealth Management, a fiduciary and fee-only firm where the interests of the client and the firm could align. He is a multi-year recipient of the Top 1,200 Financial Advisors in America distinction by Barron's, where he also ranked in the Top 50 Advisors in Texas. In 2021, Gil launched his first book titled, FOOLISH: How Investors Get Worked Up and Worked Over by the System, which hit #1 Best Seller status on Amazon.

Balancing Authority & Collaboration: How Leaders Drive Accountability Throughout The Organization

By Rob Pennnington, PhD, and Stephen Haslam

Every Leader Juggles 3 Questions:

- 1) How do I maintain my authority while at the same time facilitating a culture of collaboration?
- 2) How do I get people to take ownership of the results while respecting my ultimate authority to set the direction? And especially,
- 3) How can I get people to cooperate when we disagree?

Every Leader Risks Sabotaging Their Own Success

Unfortunately, leaders can behave in ways that sabotage their own success. Mostly this comes from a naïveté' about the power of their authority, especially in how a leader unintentionally can decrease trust and collaboration.

One CEO told his CFO to focus more on collaborating, and less on dictating. The CFO encouraged reports to share their thoughts in the next team meeting. A young manager took the risk to speak up. But then the CFO responded with, "Well that's stupid. Why would you think that?" How likely do you think that young manager would risk speaking up again? Not likely.

A CPA thought his jokes were funny. But his coworkers and clients complained about being embarrassed, insulted and harassed. Since the CPA did not intend to embarrass or insult, he believed everyone should not take his jokes "personally." HR disagreed, emphasizing leaders carry a greater responsibility for creating a culture free of jokes that embarrass, even unintentionally.

Without a heightened sense of emotional intelligence (self-awareness, self-management, and empathy for others) it is difficult for leaders in any profession to influence co-workers and clients in positive ways without tripping over their own feet with unintentional, self-defeating behaviors.



Agreements are Hidden in Most Disagreements

Common self-defeating behaviors often come down to one basic challenge: Most leaders do not know how to, or do not feel comfortable dealing with conflicts or disagreements.

Ask yourself this question: What percentage of all the conflicts, arguments or disagreements do you think might be caused by a misunderstanding?

Most say at least 50% of disagreements are caused by misunderstandings. Many put this number as high as 75%, and some even believe 90% of disagreements are caused by misunderstandings. Whatever number you thought, ask yourself this question: What percentage of those disagreements are caused because I misunderstand? Most of us come up with a smaller number because we are usually waiting for the other person to understand us first!

Imagine we have a disagreement that has been caused by a misunderstanding. If I invest the time to understand you, and you invest the time to understand me, what can happen to our misunderstanding? It can disappear. We can be left with an agreement we could not see because our misunderstanding was in the way.

People can accept a disagreement when they feel understood.

They won't accept not being understood.

Understanding is Not the Same as Agreeing

When people feel understood by you, they will trust you more and be more open to your viewpoint. That does not mean they agree. Ensuring your coworkers experience being understood, especially about opinions that differ from yours can give you more leverage and greater influence to create agreements. However, just because you think you understand, does not necessarily mean the other person feels understood.

Have you ever tried to emphasize a point while someone kept repeating, "I understand. Yes, I know. I understand." When they say, "I understand," does that make you feel understood? Of course not. You know they are confident in their understanding, but their confidence says nothing about the accuracy of their understanding.

So, how do you know when you truly understand? Well, when they tell you that you understand could be a great criteria. When they hear their words coming out of your mouth, without any of your opinions interfering or spinning what they are saying, they are more likely to experience being understood. They will be more open to another point of view, yours for instance.

Saying, "I understand" does not communicate understanding.

Let's clarify here; you may actually understand what another person is telling you, and you may even understand it better than they do. But if that person does not feel understood, he or she will still defend their viewpoint and resist yours. When a person believes that you do not understand, then nothing you say has influence on their opinions, no matter your authority.

To build an atmosphere of collaboration you need co-workers to be open to one another's viewpoints, especially when they disagree. It is likely that your reports will not be any more open to each other's opinions than you are to theirs.

It is in your own best interest to be the first one to be open to a disagreement. By doing so you can identify and eliminate misunderstandings quicker and turn more disagreements into agreements faster.

Gain Stakeholder Cooperation

How can you be this example of openness to differing points of view, while at the same time requiring that co-workers do not fall into their own self-sabotaging habits? In a typical example, Sales promises more to clients than Operations or Customer Service can deliver. Team members complain to their respective VPs, only communicating their side of the story. VPs end up in leadership team meetings defending their department's priorities (but with limited information), rather than focusing on the business objectives of the whole company.

This represents a typical challenge in which different teams, departments or functions seem to have objectives that conflict. Most often they complain to their manager who runs the complaint up the chain of command, expecting the authority figures to work out the problem for them.

So, how can leaders promote collaboration while still maintaining ultimate responsibility and authority, but without stepping in to impose a solution? Successful leaders with whom we've worked used the following steps:

Ensure Understanding, Clarify Common Ground & Reach More Agreements

- 1. Sales makes a list answering the question: What would you need from Customer Service so you can get your job done?
- 2. Customer Service makes a list answering the question: What do you need from Sales so you can get your job done?
- 3. Sales & Customer Service: Make a second list answering the questions: What do you think is on the other team's first list, e.g., what do they need from your team so their team can succeed at their objectives?
 - a. Put lists on flip charts or white boards so all see them.
 - b. Each team goes to the other team's flip chart and
 - i. Puts a check next to any item which they agree to do.
 - ii. Put a "?" next to any item that needs discussion, or about which you have reservations.

Remember – most disagreements result from misunderstandings. So, if teams just do this much, most of the time you will end up with a lot of common ground that you can agree on that will support the goals of the whole organization, not just one department or another.

Resolving Unresolvable Differences

How should leaders be involved when two groups have disagreements they are unable to resolve, while making sure they have done their due diligence and are not just kicking their job upstairs? When two teams are struggling, the following process can be helpful in creating more agreement and less misunderstanding. Have each team describe the problem, possible solutions and any unresolved issues where disagreement may lay - from the other team's point of view.

- Team 1: Describe the concerns of Team 2 so well that if they were here listening to you, they would have nothing to add.
- Team 2: Describe the concerns of Team 1 so well that if they were here listening to you, they would have nothing to add.
- Based on these concerns, each team identifies as many concerns of the other team that are also concerns of theirs.
- Each team lists where agreements might exist that could resolve these unresolvable issues, identify what issues remain unresolved and in need of a decision from a higher authority.

With this process completed, higher authority will know each team did their due diligence to work together on behalf of the whole company, not just their department, and can take steps to provide clarity and direction.

By putting priority on respect and empathy for one another, leaders drive accountability for trust, collaboration, empowerment, and the building of cohesive teams. On the other hand, it may seem so much simpler to just tell people what to do, which it is in the short run and when urgency is paramount. But then co-workers never learn to think for themselves, listen to one another, take the initiative, resolve conflicts, and own the results. And that probably makes your work harder.



Rob Pennington, PhD, educational psychologist, and Stephen Haslam, managing partner with Resource International, offer a range of training and coaching services. Free Preview of their new micro learning course at: www.CalmintheStormProgram.com.



Member Spotlight: Huandong 'Mary' Faris, CPA, and Jonathan Gibson

By Michelle Carr

Members are the heartbeat of TXCPA Houston. Remaining a thriving organization for CPAs and their supporters requires the Society to value all its members' diverse contributions and talents. We are committed to promoting diversity, equity, inclusion, and a sense of belonging in the workplace, in membership, and the accounting profession. TXCPA Houston has built a community that helps CPAs develop their professionalism, exchange knowledge, and be assured they have a powerful advocate to protect and support the advancement of the CPA profession.

At the January 5 Open House, two remarkable members attended who captured the essence of TXCPA Houston's diverse and inclusive spirit: Huandong 'Mary' Faris, CPA, and Jonathan Gibson, TXCPA Houston Student Auxiliary President. Their passion for TXCPA Houston, commitment to the CPA profession, and journey to progress in their careers will hopefully inspire you to take your next step with TXCPA Houston.



Huandong 'Mary' Faris, CPA

Grocery Services, Inc. & Grocery Services South, LLC | CFO

MAJOR IN COLLEGE:

BBA in Accounting, MBA in Management

MESSAGE TO OTHERS:

Being active in a professional organization is like working out. There are many things you would rather be doing. But the benefits of investing time in yourself each week pay huge dividends. Once you make friends there, you will look forward to it.

WHAT ARE YOUR FAVORITE DE-STRESSOR ACTIVITIES?

Dancing Zumba, cooking and yoga

Mary Faris began her career as an accounting assistant at a small local healthcare company during her last semester as an undergraduate at UH-Downtown. Over the ten years Mary worked with the company, she gained business management acumen, attained her CPA license, and earned an MBA in Management from UH-Victoria. In 2015, Mary transitioned to Houston Methodist's corporate finance department. Her time at Houston Methodist provided exposure to the corporate culture that pushed her to develop new skills and work under pressure.

At GSI & GSS, Mary utilizes the experiences from her former employers in her current role as CFO. GSI & GSS operates thirty-eight stores catering to Special Supplemental Nutrition Programs for Women, Infants, and Children ("WIC") in Greater Houston, Brownsville, and El Paso.

Mary attributes attaining her CPA license as the turning point in her career. Her colleagues warned her that the exams were difficult, so she took preparation seriously. It was a significant boost to her confidence when she passed all four parts and became a Certified Professional Accountant. Mary

noted, "Earning my MBA in Management was a close second. I knew they were important milestones in my professional development, but at the time, I did not know that they would end up defining me in some ways for the rest of my life."

After Mary received her Texas CPA license in 2008, she joined TXCPA and TXCPA Houston. Her first impression of TXCPA Houston was positive, which prompted her to get involved. She was impressed to see many experienced CPAs from various industries. Although many were already leaders in their fields, it was inspiring that they still found value in TXCPA despite their accomplishments. Now, she is good friends with many of them. Mary stated, "TXCPA offers the continuing professional education and connections that a CPA needs to grow. It is not enough to be an expert when no one knows who you are, nor is it enough to know a lot of people but not have any expertise to offer them. Through TXCPA, CPAs can build strong networks beyond their current jobs and meet other CPAs who can teach them and introduce them to new opportunities."

Mary strongly believes in the benefits of volunteering and being involved in organizations that support women in the accounting and finance fields. Her professional affiliations include TXCPA Houston, a chapter of the Texas Society of Certified Public Accountants (member of CFO/Controller Conference Committee), Federation of Houston Professional

Women (President-Elect 2022), Accounting & Financial Women's Alliance (CPE Director), and UH Alumni Association Fort Bend Scholarship Committee (Committee Chair). Mary noted, "I think the key to creating more diversity and attracting more women to accounting and finance is to highlight the stability and opportunities for advancement within the industry. The skills are highly sought after and transferable. Private business. government, and nonprofits all need CPAs." She also mentioned that women could find support, understanding, and encouragement from other women in the same field.

Mary credits several women leaders who have helped her on her career journey. "I admire Jill Almaguer and Liz Cloud, who are both past presidents of the Federation of Houston Professional Women, Jill and Liz mentored me and encouraged me to take on more leadership roles. Ellie Moore, Colene Blankinship, and Joan Straub, the past presidents of Accounting & Financial Women's Alliance, have also been on my side and pushed me to do more. They all helped me to believe in myself and continue their work of empowering other women." Mary's advice is to take advantage of continuing education to better yourself and find a mentor who knows your industry.

Mary's favorite quote by Michelle Obama says, "There is no limit to what we, as women, can accomplish."



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Jonathan GibsonStudent Auxiliary President

MAJOR IN COLLEGE:

Accounting

UNIVERSITY:

University of Houston - Downtown

CURRENT YEAR:

2nd Year of Graduate School

LATEST CAREER NEWS:

Joining Deloitte post-graduation in the summer

WHAT DO YOU LIKE TO DO IN YOUR FREE TIME?

Reading, learning, watching Law & Order, and spending time with my wife and son.

Jonathan Gibson became a TXCPA Houston member in May 2021 and currently serves as President of TXCPA Houston's Student Auxiliary. His first encounter with TXCPA Houston was through an email from Carol Spencer announcing open leadership positions within the Student Auxiliary. After reviewing the openings, Jonathan recognized the leadership opportunity to grow as an accounting student and professional. Also, he saw TXCPA Houston as a path to make connections within the Houston area, a goal of his after moving from Marrero, Louisiana, to Houston in April 2019.

Jonathan said, "My first impression was how encouraging the SAUX Steering Committee is in assisting and developing students by challenging members to provide quality content to the students. Our events are tailored to give students insights into current working professionals' day to day schedules, so we want to ensure we ask the right questions. I believe these experiences challenged myself and my team to meet the expectations of the committee."

At the first Fall 2021 semester event, Jonathan was nervous about being a moderator. He overcame his fears of public speaking and gained confidence in moderating after receiving excellent feedback from the committee and other attendees. His advice for students is to start

building connections for their careers early; don't wait until after graduation to network. TXCPA Houston offers students many professional development opportunities through service on committees. The value comes in the quality of connections made within the Society and gaining people in your corner who want to assist students' professional development.

Jonathan's best member experience is "Getting to work with my SAUX team members and discovering what their strengths and weaknesses are. Each member has contributed uniquely, and I believe we had a great team this year. I enjoyed most working with the committee and other SAUX members to find resolutions on the few bumps we had this year. We brainstormed and worked as a cohesive team to correct our mistakes."

Jonathan's most prominent career goal is to attain his CPA license (he began studying for the CPA exam in January 2022). He would like to own an audit shop where he provides an array of services to his clients. Jonathan believes attaining his CPA license will give him the confidence to face other challenges that come with life. He observed, "To be a CPA requires discipline and sacrifice as well as an unwavering desire to learn how to ensure the best value for the client."

Jonathan uses his doubts as motivation to prove that nothing in his life is out of reach. He noted, "I am proud of the work and position my career has taken, proud of my development as a student at UHD, proud to say I led the SAUX team for TXCPA Houston, and proud to be joining Deloitte this summer. These are all accomplishments I saw as opportunities to challenge myself. I've learned in life it is best not to prove your doubters wrong but prove yourself to be right."

Jonathan learned this valuable lesson from his upbringing. He is the second oldest of four boys. His parents made substantial financial sacrifices to raise four boys and invest in their education. As an undergrad, Jonathan did not appreciate his gift of an education and struggled academically. This led to personal doubts about his performance and value within the profession after graduating from Nicholls St. University in December 2015.

However, Jonathan's mother always said, "Gotta make the doughnuts." She related this saying to doing the "necessary work" to provide for her family no matter the obstacles or challenges her job/day provided. Jonathan internalized the expression as doing the "necessary work" to tackle his biggest life challenges. The necessary work included more consistency, focus, and discipline. Since undergrad, Jonathan has sought to cultivate these traits and see growth within TXCPA — Houston as the "necessary work" and advantage to his development as a professional.

On November 18, 2021, Jonathan became a firsttime father to a baby boy named Jayvian Lee Gibson. Jonathan now has a new motivation to achieve his goals. "I want to accomplish my personal goals to encourage him too, in his unique way, and stand up to his future challenges."

One key mentor, a former manager, named Gary Joseph, Partner at DAS, helped guide Jonathan along his professional journey. Gary represented the standard or quality of professional Jonathan admired to become. After learning more about Gary's background, Jonathan related to Gary's stories. They developed not only a mentor-mentee connection but also a friendship. They both live in Houston now and meet up frequently. Jonathan appreciates the support, inspiration for growth, and great advice Gary contributed to the early stages of his career.

Jonathan is currently in his 2nd year of graduate school at the University of Houston-Downtown with several years of professional work experience in audit. His message to others is, "Do not run from the challenge of juggling school, work, and commitment to the Society or your professional development. Give an honest assessment of what is important to you and your career, and do not overcommit yourself. Communicate with your team about the time you have to offer."

As a graduate student, president of the Student Auxiliary, member of TXCPA Houston, and new father, Jonathan says time management and communication are the most effective skills to navigate his full plate. As circumstances change, he is mindful not to overcommit his time to one task and communicates with his SAUX team, employer, and wife.

Jonathan's other affiliations include the UHD NABA - External Relations Chair and the Institute of Internal Auditors - Academic Relations - UHD. He is always seeking to grow and enjoys meeting new people. In his opinion, "You never know what you will learn from anyone, but strategically developing relationships with the right people can accelerate your career and life."

Therefore, students should become members to take advantage of the network available through TXCPA. TXCPA Houston is the largest chapter within TXCPA. A wealth of experience and knowledge is available to students who desire to be a CPA.

We should do our part in reaching diverse students by communicating to students the opportunities within the profession. We accomplish this by ensuring that our efforts are all-inclusive to reach students from different backgrounds. - Jonathan Gibson

If you felt inspired by Mary and Jonathan's interviews and want to take your next step with TXCPA Houston, please contact Membership Manger Carol Spencer at <a href="mailto:cspencer@txcpahouston.csp



Michelle Carr is TXCPA Houston's Marketing Coordinator. Share your TXCPA Houston story or article at mcarr@txcpahouston.cpa.

Take Your Next Step With TXCPA Houston

By Carol Spencer

Membership offers different value for each individual. Your best benefits come from your careful study of the opportunities offered by TXCPA and your local chapter. Yes, we encourage you to visit our website at www.txcpahouston.cpa to find committee volunteer options, continuing education, advocacy, networking and more. There are always unlisted benefits to your membership.

Nonprofit organizations in the Houston area frequently search for a CPA to serve on their board. For instance, the Wescott Cemetery Association is seeking a CPA interested in hands-on boards service. Not just another line on your resume, but the opportunity to give back to your community in working to restore a historic Texas cemetery. This association needs a CPA to oversee their Quick Books, filing of the 990, and state franchise tax reporting. Some work is required, but you're making a lasting difference.

Many members share self-realized benefits including:

- Mentoring receiving timely coaching from other professionals and mentoring new or future CPAs
- A safe environment to be a speaker or a leader
- Opportunity to serve on AICPA boards
- Education on much-needed soft skills

- Peer-to-peer advice on accounting issues
- Community engagement

TXCPA Houston offers additional exclusive benefits:

- Enhanced professional relationships with members of other local associations at frequent social events
- Friday webinars dedicated to technical and non-technical training
- Tuesday Talks on Facebook Live learn more about TXCPA Houston event sponsors, members, accounting professionals, and potential vendors for CPA firms
- A virtual rolodex of contacts to engage with for coaching, marketing, IT needs
- Awards recognition for actions in the local chapter, community, and profession

If you have attended a recent in-person or virtual social event – thank you! If you haven't, click here to find upcoming opportunities. Be sure to subscribe to the "TXCPA Houston Weekly News" e-blast (Wednesdays at 5:00 p.m.) to find upcoming events, both social and CPE, and news from your Houston Chapter and the TXCPA.

If you want to become more involved, contact Membership Manager Carol Spencer at cspencer@ txcpahouston.cpa.



well-established track record.

Let's Start a Conversation

Need to discuss financial planning, investment management or estate and trust questions? We can help you navigate financial complexity.



TXCPA Houston participated in a variety of community service events during the month of December. Thank you to everyone who participated at our Young Professionals Houston Food Bank Volunteer Event on November 30, the Buffalo Bayou Clean-up event on December 18, and the Houston Blood Drive. We truly appreciate

your service.

MONTH OF SERVICE RECAP



Thank you to Maldini Sakah, Mark Allen, Kelly Higginbotham, Betty da Silva-Draud, Kay Yoo, and (not pictured) Kevin King who volunteered at our Clean-Up Buffalo Bayou Park event on DEC. 18! Many cheers for these weekend warriors!



Young Professionals at Houston Food Bank on NOV. 30! Thank you to everyone who came out to give back to the greater Houston community!

Young
Professionals
at the Houston
Food Bank

JANUARY MEMBER OPEN HOUSE



Young Professionals: (L-R) Joseph Tajik, Hollyn Coleman, Layla Harkey, Amy Johansson, Phillip Arvanetakis, and Maldini Sakah.

Thank you to everyone who joined us for our Member Open House on Wednesday, January 5! We had a great turnout to welcome our Houston-based accountants who recently passed the CPA exam!

We truly appreciate our members! Thank you for your support and for networking with our new members. We were thrilled with the level of engagement and member connections. Join us at our next member event!

CLICK HERE TO VIEW ALL EVENTS



Student Auxiliary Leadership: (L-R) Connor Clancy - Vice President of Operations, Anna Guo - Vice President of Marketing, and Jonathan Gibson - President



Darrell Groves, Kelly Hunter - TXCPA Houston President, and Eric Huddleston

2022 ANNUAL BUSINESS MEETING AND ELECTION OF OFFICERS

Thank you to everyone who attended the Annual Business Meeting at The Briar Club on January 13. Members enjoyed a delicious dinner, great presentations by TXCPA Houston President Kelly Hunter and TXCPA Chair Jason Freeman, and connected with several new and active members.

At the Annual Business Meeting, members unanimously affirmed the 2022-2023 TXCPA Houston leadership election results. Click here for a complete list of elected and continuing leaders.





Charlotte Jungen, Tonja Rodriguez, Cindy Pridgen, Kelly Higginbotham



Adam Dimmick, Michelle Mullens, Kelly Hunter - TXCPA Houston President

TXCPA
Houston Past
Presidents with
Current TXCPA
Chairman



(L-R back row) David Acosta, Pat Durio, Ramsey Womack, Darrell Groves (L-R front row) Steven Goodman, Bob Ogle, Jason Freeman (Current TXCPA Chairman), Kathy Ploch, Sheila Enriquez

MEMBER EVENTS

2nd Annual Create an Accounting Meme Challenge

Join other young professionals on **February 10** for an hour of fun-filled networking at our 2nd Annual Accounting Meme Challenge! Can't stay the entire hour? Stop in and join us when you can. Get ready to network, brainstorm with others, and laugh as you try to earn the bragging rights of generating the Best Accounting Meme with the picture provided! Recent grads and CPA Exam candidates – we want to see you there!

Register here



Stay Connected to TXCPA Houston!

Subscribe to the <u>"TXCPA Houston Weekly News"</u> <u>e-blast</u> (Wednesdays at 5:00 p.m.) to learn about upcoming events, both social and CPE, and news from your Houston Chapter and the TXCPA. Sign up today to stay connected to TXCPA Houston!

Click here to subscribe to the "TXCPA Houston Weekly News"

TXCPA NEWS

Free CPE: Professional Issues Update Webcast

When: 10 a.m. - Noon (CT) on February 23 CPE Hours: 2

Join TXCPA for one of the FREE CPE webcasts you receive as a member benefit. This popular complimentary offering helps members stay on top of the latest issues facing accounting professionals and the clients and companies they serve – all conveniently accessed online.

Register here

Visit TXCPA Exchange for Member-to-Member Advice

Our online community, TXCPA Exchange, is a great place to get advice and feedback from fellow TXCPA members on a variety of topics related to tax season, software recommendations and more! Remember to browse through previous discussion posts and offer your knowledge/input where applicable.

There are currently three communities within Exchange: CPA Practice Management, Nonprofit Accounting and Tax Issues. Members are encouraged to join these communities to start conversations and discussions on related topics.



UPCOMING EVENTS

CLICK LINKS BELOW TO REGISTER

COMPLIMENTARY CPE CLASSES FOR MEMBERS

02/11/2022 <u>Who Me, Selling? – Catherine Brown (Virtual)</u>
1 hour
02/16/2022 <u>Hiring the Right People – Gary De Rodriguez (Virtual)</u>
1 hour

ETHICS

02/17/2022 Ethics: It's a Matter of Choice, Deanna Sullivan (In-Person) 4 hours
03/17/2022 Ethics: It's a Matter of Choice, Deanna Sullivan (Virtual) 4 hours

TAX UPDATE CLASSES

02/08/2022Federal Tax Update, Chris Hesse, CPA (Virtual)8 hours02/08/2022Individual Income Tax Update, Blaise Bender (In-Person)8 hours02/09/2022Business Income Tax Update, Blaise Bender (In-Person)8 hours

SAVE THE DATE FOR TXCPA HOUSTON 2022 CONFERENCES **SEPTEMBER** MAY **SPRING ACCOUNTING EXPO** CFO/CONTROLLERS CONFERENCE 18 -19 2022 **Grand Tuscany Hotel** JUNE **SEPTEMBER** FINANCIAL REPORTING 15 - 17 **CPE BY THE SEA** 2022 SYMPOSIUM ROADMAP TO RETIREMENT **AUGUST** OCTOBER **ENERGY CONFERENCE** 2022 **WORKSHOP & PERSONAL** 2022 FINANCIAL PLANNING CONFERENCE BIT.LY/TXCPA-HOUSTON-CONFERENCES

Chapter News - Student Auxiliary

The TXCPA Houston Student Auxiliary provides career training, career path options and information, networking, and hiring opportunities for Houston-area students interested in accounting. Learn from industry and public practice professionals about lucrative and exciting careers that await you. Sign up for these fast-paced roundtables and panel discussions today!

Changing Lanes: Alternatives to Public Accounting - FEB. 11

As a CPA, your career can take you to many interesting fields in addition to public practice. Although you might begin your professional career in public practice audit or tax, you might make a move to a career in industry a few years into your career. Join TXCPA Houston's Student Auxiliary on February 11 from 6:00 - 8:00 p.m to learn more about career opportunities in Public Accounting. Register here

F is for Fraud: Investigating Forensic Accounting and Valuations - FEB. 25

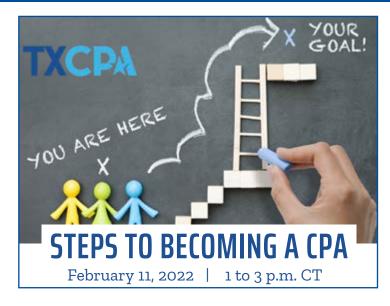
Do you love solving mysteries? We have the event for you! Join Student Auxiliary panelists on February 25 from 6:00 -8:00 p.m to hear insights on forensic accounting, valuations, and litigation. Register here

CPAs in Real Life: Fact or Fiction? - MAR. 4

Do CPAs always get free lunch? Are CPAs always crunching the numbers and doing peoples' taxes? Let's quash some myths and find out what a day in the life of a CPA really looks like. Join TXCPA Houston's Student Auxiliary on March 4 from 6:00 - 8:00 p.m. to hear from the current TXCPA Houston President and two Past Presidents. This is one talk you don't want to miss! Register here

TekTok: Tech Innovation in Accounting - MAR. 25

Is it as simple as pressing a button? Can a line of code replace an accountant? How does blockchain affect traditional CPA professions? Join the Student Auxiliary on March 25 from 6:00 - 8:00 p.m. hear from technology insiders. Register here



Steps to Becoming a CPA - FEB. 11

The Texas Society of CPAs invites you to attend a FREE virtual program specifically created for future Texas CPAs! This virtual learning opportunity on February 11 from 1:00 - 3:00 p.m. is for students who are close to finishing their 150 hours or candidates who have not completed the process to finish the licensing requirements to become a CPA in the State of Texas. There will be door prizes and a panel of young professional CPAs to answer questions. Register here

Become a Campus Ambassador

TXCPA is seeking Campus Ambassadors at Prairie View A&M University, Texas Southern University, University of Houston – Clear Lake, and the University of St. Thomas. Help TXCPA and TXCPA Houston share information with your fellow students. Click here to apply!

If you have questions, contact **Carol Spencer**.

Join our GroupMe!



IN MEMORIAM

In 2021, we learned of the passing of 33 CPAs from the Houston membership area.

NAME MONTH REPORTED Kenneth Lee Decker January John G Doherty January Joseph Wayne Cliett January Bert H Lynch January James Davis Humphrey February Romeo F Laurel February Curtis Jerome Milks February Gray Wakefield February James Louis Daily May Frank H Simonton May Clinton F Bateman June Roy Edgar Box June Pat Ann Butler June Charles Edward McDonald June Walter A Saunders June Randolph P Burch July John Lewis Carson July Karen Alaine Johnston July Lucy Ann Martin July Johnnie Lee Perrone July Don F Gaston August Colin McRae Piggott August Carol A Cooper September William C Cobb October George Bernard Dickinson October David V Garza October Michael David Katzeff November Charles Kellar Burns December December Myron Bergson Marks December Roger Dale Martin Roswald Knox McMullen December John J Robinson December Douglass L Simmons December



If you're aware of a CPA who passed away, please email TXCPA Houston Membership Manager Carol Spencer at <u>cspencer@txcpahouston.cpa</u>.

Classifieds

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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, by phone (888) 847-1040 or visit our website www.APS.net.

Featured Practices for Sale (gross revenues shown):

- North Houston CPA \$1.7MM, \$575K
- West Houston CPA \$1.1MM, \$250K, \$189K
- NW Houston CPA \$588K
- NE of Houston CPA \$567K
- Galveston County CPA \$300K
- SE Texas CPA \$283K

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.

INTERESTED IN PLACING AN AD IN THE FORUM?

Contact Michelle Carr at mcarr@txcpahouston.cpa for more information.

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.

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Information and opportunities relevant to you!

Name:	Business:
Email:	Phone:
	Address:
Get involved with TXCPA Houston by serving on committees importan	t to you. Please check your top three committee(s) based on interest.
CPE Related Committees	Professional Services Committees
Quality control and oversight of Society CPE	Plan topics, serve as on-site coordinators for CPE
CFO/Controllers ConferenceCPE by the SeaTax Expo	Accounting & Auditing Forensic & Valuation Services Personal Financial Planning Circular 230 Practitioners Roundtable
Membership Related Committees	Northwest Roundtable
Work on Society image enhancement, career awareness and member services Membership Development Young Professionals	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
Industry/Other Committees Plan topics, serve as on-site coordinators for industry CPE Business & Industry	
Energy Healthcare	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. <u>Click here</u> to complete the form online. If you have questions, please contact Membership Manager Carol Spencer at <u>cspencer@txcpahouston.cpa</u>.



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