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Lindsay & Brownell LLP
http://lindsayandbrownell.com/2/our-team.aspx

Guest Speakers

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Career Expectations

Chris McKerlie
• Chris started preparing taxes when he was 16. He was hired by Lindsay and Brownell in the summer of 2013
• Lindsay and Brownell starts its new hires with a two week training program, most of the tasks are learned by hands on experience. Ultimately Lindsay and Brownell’s goal is training each employee to be independent.
• Chris will prepare tax returns for clients. The process, in a nutshell, is the following:
  o A project is assigned and then completed
  o The finished product is reviewed by another employee who has more experience
    ▪ Discrepancies are researched
  o After the product is edited the partner signs off on the documentation
• Lindsay and Brownell is currently in busy season so the focus is on tax returns. There are other tasks to do throughout the year.
Client interaction on the tax staff level involves minimal client contact. Sometimes a client will be contacted via phone, but it is minimal. However, during busy season more tax staff may contact clients for quick information concerning tax documents.

Work life balance at Lindsay and Brownell is encouraged. One may have flexible hours during non-busy season. Some examples include taking half days if one’s hours are still being satisfied.

Cyndi Fuller
- The change from associate to senior include the following:
  - Prepare more complicated returns
    - As a senior you will be filing in more states and filing more difficult transactions
  - Review tax returns
    - Seniors are the reviewers for the associate’s work
  - Client contact starts here
    - Clients will start calling you for answers on specific questions.
    - This is the stage where client relationships are starting to be built
  - More engagement management
    - Seniors will be responsible for juggling more tasks and responsibilities
    - Prioritizing is a big factor since there are more duties to fulfill

Chris Lopez
- Chris chose Lindsay and Brownell because he enjoyed the culture. The firm worked better with his personal goals.

Q&A

Q: Do you still do tax research?
A: Clients will often have questions that do require some research. This differentiates this firm from a tax preparer. Research is a big part of the firm. It varies during the time of the year.

Q: What types of clients do you serve industry wise?
A: Real estate, technology, service, law firms, dentist, pharmaceuticals, manufacturing, foundations (7 of top 10 in SD), not for profits, distributing

Q: Does it take longer to become a manager at L&B compared to the Big 4?
A: The promotional system is not as structured as the Big 4. Three to four years is the current average, but some professionals have made senior in two and a half years. Cyndi made manager in four and a half years. Promotions are also based on the needs of the company.

Q: How does Lindsay and Brownell recruit for full time and internships?
A: Lindsay and Brownell recruits similarly to the Big 4. Recruitment and interviews happen in the fall semester and offers are made for the following summer. Refer to career services for the correct date to apply. Lindsay and Brownell hired two audit people last
summer. Usually Lindsay and Brownell will hire three to four people per summer. Right now Lindsay and Brownell has six tax interns. Lindsay and Brownell also recruits from USD and PLNU.

Q: Has SDSU prepared you for your career?
A: SDSU gives you a good understanding of accounting. Training is expected for new hires. Lindsay and Brownell knows you don’t have the training to prepare taxes, etc. First 6 months are on the job training. There is a learning curve to learning the programs and understanding the big picture. Acctg 321 teaches you good work ethic for your career.

Q: How do you choose tax or audit?
A: (from Jeff who has experience in both fields) There are more similarities than differences between tax or audit. Both adhere to rules, require strong verbal and written communication, and involve client contact. Audit requires traveling and may lose its appeal to someone who wants a more stable workplace by going to an office everyday. It is a personal choice for whichever you find more interesting.

Q: When you recruit do you prefer a MS or BS?
A: Lindsay and Brownell will talk to anyone with an accounting degree. If the choice is between two equal candidates then a MS in tax may be more desirable. Not all employees hired have their master’s.

Q: Are new hires traditionally hired from the internships?
A: It is L&B’s goal to identify people through the internship program. About one intern will get hired full time.

Q: How is the interaction between different staff members?
A: The office hosts Saturday basketball games, lunches, and dinners at times. There are strong employee bonds. Games are promoted during busy season; this year it is a healthy bingo game. The firm encourages camaraderie.

Q: How do staff members stay healthy?
A: Gym attendance has been more consistent because of healthy bingo. There has bee a team that signed up for the Mud Run. There is a softball team and a volleyball team. Firm has sponsored healthy snacks in the break room to go along with healthy bingo.

Q: Do partners take more of a salesman role?
A: Partners are required to bring in clients and business to the firm. Partners need to have relationships outside the firm. They will often join committees and attend networking organizations. Many clients refer other people to Lindsay and Brownell because they trust the partners of our firm.