



# SDSU Student Accounting Society

## Meeting Minutes: Baker Tilly Requisite Skills for Success

10/7/2021

### **Presenters:**

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### **Presentation:**

#### Who We Are

- Formerly SquarMilner
  - Acquired by Baker Tilly
- Top 10 Accounting Firm
- Established 1931
- Headquartered in Chicago, IL
- More than 50 office locations coast to coast
- Leading advisory, tax, and assurance firm
  - Assurance: 32%
  - Tax: 29%
  - Advisory: 39%
- Balanced service portfolio
- Serve clients globally
- Baker Tilly US is a part of an international network represented by 123 firms in 148 countries world wide



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- Types of service lines we work with
  - Construction & real estate
  - Energy & utilities
  - Financial services
  - Manufacturing & distribution
  - Professional Services
  - Higher Education
  - Healthcare
  - Retail
  - State & Local Government
  - Not-for-Profit
  - Agribusiness
  - Food & beverage
  - Life Sciences
  - Private Equity

### Definition of “requisite”

- Needed for a particular purpose
- If you have already landed an internship...now what? What do you need for what purpose?

### Problem solving:

- At the end of the day...do you have a solution to the problem?
- Reflect on your own problem solving experiences.
  - When were you able to come to a table with a solution?
- Being someone who is able to bring solutions to the table is so important!

### Leadership:

- Make OTHER people better
- Your ability to make others better at what they do is what makes the firm better!
- You look up to others to know what to do...how can you be this for others?
- Those who bring negative energy detract from the overall improvement of the organization
  - Even as an intern, bringing positive energy can be a sign of leadership!
  - Your attitude will translate into future leadership rules

### Time management (prioritize)

- Learn over time which commitments are the priority!
- Keeping what you need to do accurate

### Self-reliance (part 1):

- Think things through and try to research solutions to the issues
- Can you conquer the problem on your own?

### Self-reliance (part 2)

- Go for HELP when something is unfamiliar and doesn't look right to you...it might not be!
- If you dwell on it on your own, you may never get
- Self reliance is really knowing when to ask for help and when to take it on on your own is important

### Customer Service

- Learn and understand the client's business
- After working for a client long enough, you can start to learn about their industry and get to know
  - Maybe take some time to read about them in the news
- Deliver excellent client service
  - Be responsive to requests
  - Send industry-related or other relevant information
  - Be prepared and prompt for meetings
  - Can-do, will do *attitude*

### Communication

- What part of communication should we focus on?
- **Keep people updated.** Make sure everyone is on the same page
  - Share your status on the work
  - If you can't meet a deadline, communicate that early
- Be an active Listener!
  - If you are able to listen without needing to dominate the conversation, you will have a wonderful skill that will serve you well in the profession