



SDSU Student Accounting Society

[Meeting Minutes: SDSU Alumni Panel]

November 23, 2020

Presenters: Jose Valencia (Baker Tilly, Audit), Ethan Ross (CalCPA), David Yanke (PwC, Assurance), Allison Kuykendall (KPMG, Audit), Sam Mascareno (RSM, Managing Partner), Jordan Cicciarelli (EY, Audit), Monica Mixer (BDO, Audit)

Presentation:

- **CalCPA**
- What is CalCPA
 - Largest network of CPA's in California
- Benefits of Joining
 - Free membership
 - Job resource
 - Place to find mentors
 - Great network outlet
- Getting Involved
 - Sign up for free membership by 11/26 to get \$5 Starbucks Gift Card
- **Alumni Panel**
- Tell us about yourself
- Sam:
 - 27 years in Accounting
 - 19 years in RSM
 - 8 years in Big Four
 - Graduated long time ago
- Jose:
 - Audit Manager
 - MSA Program
 - December 2013 graduation
- Jordan
 - Audit Senior
 - 2018 graduation
 - Completed internships in EY
 - Graduated from BAP but had friends in SAS
- Monica
 - Fall 2017 graduate
 - 4 busy seasons

- Born and raised in San Diego
- Never left San Diego
- David
 - 2nd year Assurance Associate
 - Summer 2019 graduate
 - Huge SAS and BAP involvement
- Allison
 - December 2019 graduate
 - Scripps Ranch High School alumna

Questions:

- How did your SDSU experience help you find your first positions after graduation?
 - Monica
 - First undecided when starting at SDSU
 - Accounting fit well with her
 - Wanted a business niche
 - Started recruiting process on summer before junior year
 - Went together with sorority member to accounting events
 - Sorority member is at KPMG
 - Know what you want to do early
 - Sam
 - Develop good relationships/friendships at school
 - Friendship helped with getting first job
 - Connections will help
 - Be friendly, be nice
 - Jordan
 - Getting involved in organizations
 - Firms would host info sessions
 - Really build your network
 - David and Jordan worked together
 - Good friends
 - David
 - Getting involved in campus
 - **GET INVOLVED**
 - Utilize campus resources
 - Take advantage of these meetings
 - Firms are also looking for good fit
 - Start off strong for Spring Semester Recruiting
 - Don't think you're too late or too early
 - Speak up and ask for help
 - Jose
 - Get started early
 - Get whatever you can in
 - Real-world experience is valuable

- Huge change from student to professional
 - Unpaid internship
 - Maintain friendships and relationships
 - Can't predict future
 - Build your network as soon as possible
 - Allison
 - So many different things going into recruiting
 - Up to each student to take advantage of resources
 - Use your resources
 - One-on-one conversations
 - Don't know what to do with recruiting
 - Ask for help
- Which of your personal traits and professional skills is most valuable for your job?
 - Jose
 - Adjustment period between student and professional
 - Time management and communication
 - Juggling multiple jobs and multiple engagements
 - Self-motivated
 - Manage your own time and deadlines
 - Open-Door policy
 - Jordan
 - Intellectually curious
 - Enjoy learning for the sake of learning
 - Different projects
 - Opportunities to learn and grow
 - Taking part of conversations with business
 - Take steps to make life easier for people you report to
 - Encourage questions
 - Put thought in questions
 - David
 - Adapting to COVID-19
 - Time management, organization, self-motivation, communication
 - Need communication
 - Develop interpersonal skills
 - Organizing and managing workload is important
 - Lots of skills to hone and develop in college
 - Don't need to know everything
 - So much training that firms offer
 - Nothing goes unnoticed in job interviews
 - Allison
 - Trust yourself
 - Trust your experience
 - Finding new ways to get instruction

- Things will come
 - Reach out with situations you don't know about
 - Sam
 - Learning Agility
 - Ability to learn
 - What makes a successful associate may not make a successful manager
 - Every stage will require different approach
 - I can't teach you to be nice
 - Manager above: Get clients in
 - Learn to adapt to new situations
 - Monica
 - Ask senior for expectations
 - Have no idea on what's going on initially
 - Find what your learning style is and communicate that
 - Make sure there is balance in your life
 - Focus on mental health
- What is one piece of advice you have for students entering professional workforce?
 - Allison
 - Stigma of competition
 - Your path can change a lot
 - This is not the end of your path
 - Know there is always next season
 - Really know that the skills you have in school transfer over
 - Put the time in now
 - Monica
 - Pass your CPA Exams before you start
 - Hard to study and work
 - Get your CPA Exams done early
 - Not the end of your world if you don't get CPA Exams done early
 - Sam
 - Important to have good balance between confidence and humility
 - You deserve to the right to be there if you're hired
 - If you didn't belong there, you wouldn't be there
 - Get beat up a little bit
 - You don't know everything
 - Make a mistake, learn from it, and don't do it again
 - Jose
 - Be open-minded
 - Exposed to a lot of different cultures and personalities
 - Professional skepticism
 - Use your judgment
 - Let the people above you make the call for you
 - Exposed to a lot of different things

- Learn from everyone
 - Who do you want to be stuck with for 10 hours a day?
 - Comes down to personality
 - Different viewpoints are strength
 - David
 - Network at the company when you get in
 - Get opportunities
 - Get in an extracurricular activity
 - Make yourself known
 - Don't stay to people you know
 - Meet new people
 - Jordan
 - Don't expect a lot of technical knowledge
 - Have a good attitude
 - Build your network
- What was your most memorable experience at SDSU?
 - Jordan
 - Lots of cool stuff at SDSU
 - Joining student organizations
 - Internship at EY
 - 30 interns
 - Whole intern class became close
 - Cramming before exam, celebrating after exam
 - Become smaller school, SDSU
 - David
 - Making the most of your college experience
 - Take advantage of everything
 - Take steps away from accounting career
 - Graduate teaching at Accounting 201
 - Daunting first semester
 - Teaching classes was nice excursion
 - Mentorship opportunities
 - Helped students with career paths
 - Allison
 - Being with peers in organizations
 - Creating relationships with people
 - School becomes smaller in upper division classes
 - School becomes more social
 - Spending more time with peers
 - Sam
 - Interactions
 - Really good friends with people you study with
 - 27 years later

- Make friendships
 - Get involved and make a difference
 - Jose
 - When I got an offer letter
 - Validating hard work
 - Intimidation at first with professionals
 - What am I going to say to them
 - Get them to talking about themselves
 - Get professors to share knowledge with you
 - Put yourself in uncomfortable situations
 - Get yourself nervous
 - Experience is valuable
 - Grow up quickly with recruiting season
 - Monica
 - Accounting major is difficult
 - Get close with accounting professors
 - Graduation
 - Keep teachers and professors in the loop
- How often do you guys have to give presentations - Naief Aldhafairi
 - Jordan
 - Depends on your level
 - Higher level = More presentations
 - At least once a day
 - Leading meetings
 - Presentations more conversational
 - Monica
 - Team staff
 - Involved in conversation but not knowing everything
 - Expected a little more involved
 - Senior
 - Holding calls and discussions everyday
 - Team engagement meetings are most presentation-like thing you'll be doing
 - Do virtual trainings
- How important is GPA for recruiting process - Daniela Chavez
 - David
 - GPA minimum
 - GPA is not end-all, be-all
 - We really look at GPA, especially major GPA
 - Need to pass with CPA exam
 - Poor GPA may indicate poor performance in CPA
 - Supplement GPA with more experience and involvement
 - Handle multiple tasks at a time

- Are you on a committee?
 - If you are not doing anything else with your life, you should get a 4.0 GPA
- What can make you more attractive for recruiters? - Ethan Ross
 - Jose
 - Excel is useful
 - Take some classes
 - Get certifications
 - Wall Street Journal
 - Keep up to date with industry and business
 - Want to be resource to client
 - Know some key words
 - Read financial news
 - David
 - Most work papers are in Excel
 - PwC has made big investment in digital advancements
 - Transform data
 - Come to the meetings
 - Group setting
 - Look at Career Services and Handshake
 - Create more opportunities
 - Jordan
 - Altrix Certifications
- Data Analysis - Stephen
 - Jordan
 - Big part of audit
 - Used a lot for a lot of different things
 - Internal tool is used
 - PowerBI and Altrix
 - Lots of people transfer from Audit to Data Analytics
- Different path - Stephen
 - Jose
 - If you decide accounting is not for you,
 - Having an accounting understanding can help you venture into business-related field
 - Understanding accounting helps a lot in business
 - Leverage knowledge of SDSU accounting
 - Accounting opens lots of doors for you
 - Shielded from being outsourced
 - Essential services
 - Job security
- Finishing CPA before exam - Claire
 - Monica
 - Take advantage of time not working

- Get it done sooner than later
 - Get it done when you're staff
 - Leave public accounting -- competitive edge
 - CPA on resume
 - David
 - Make the most of the time you have
 - Only need undergrad degree to sit for exam
 - Take as much time as you can to frontload exams
 - Bonus if you finish Exams, particularly in your first year
 - Paid for study materials
- Why public accounting and not private accounting - Jayson Grey
 - Sam
 - Exposure of diversity
 - Start broad and narrow down
 - Make decisions based on experience instead of gut
 - Jose
 - Get exposed to a lot of things
 - Interacting with a lot of people
 - New connections
 - CPA has a lot of credibility
 - CPA license can be used for a lot
 - Public accounting gives a lot of flexibility
 - Structure is set
 - Ambition will help
 - Public accounting is really good in building a lot of things
 - Jordan
 - Speed of career growth
 - Lots of opportunities
 - Transaction advisory
 - Lots of options
 - David
 - Projection of career growth
 - Steady as long as you meet expectations
 - Open doors
 - Different feel for business
 - Get to take leaderships with small projects
 - Get to feel out industries
 - So many different paths
 - Monica
 - Room for growth
 - Know what path you're on
 - Work hard, play hard
 - Heavier presence in public accounting firms

- Opens door
- Auditing is never boring
- Enjoyed public accounting
- Work culture
 - Jordan
 - Firms will have option to go in or stay home
 - Virtual lunch
 - After busy season, much more mellow
 - Jose
 - Fully remote before pandemic, audit
 - Tax department struggled a little more
 - New hiring class is starting in a few weeks
 - Optional to come into office
 - Teams is used a lot
 - Initially hesitant with remote work
 - Work Flex involved will increase
 - Zoom, Data Analytics tools used
 - Sam
 - Accelerates pace of change
 - 30% of workforce wants to work from home everyday post-COVID
 - Getting comfortable with remote work is necessary
 - Business is done differently
 - Learning Agility