



SDSU Student Accounting Society

Meeting Minutes: CBIZ

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Presenters:

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Presentation:

Who is CBIZ

- 100 + offices
- 5,000 + associates
- 82,000 + clients
- 10th largest accounting firm in the U.S

Why CBIZ

- Audit, tax, advisory, forensic accounting, consulting, benefits and insurance.
- National resources with a local feel
- Staffing model: 6:1 Ratio
- Client variety
- More exposure
- 9 golden state locations to choose from.

Life at CBIZ Golden State

- 80+ associates
- Largest client variety: entertainment, real estate, non profit, manufacturing, consumer goods, biotech, agriculture, etc.
- Community events + volunteering
- Social events: happy hours, summer parties, post busy season parties, etc.
- Career advisor + peer contact program.

Recruitment process

- Interviews for intern and associate roles are happening now so be sure to apply soon. Deadline is March 11th
- San Diego office openings: tax associate, 2022 and 2023, audit associate, 2022 and 2023, forensic intern and associate, 2022 and 2023, audit and tax intern, 2023.
- Visit CBIZ campus for more information.

Workplace realities

- Day to day challenges
- Experiencing stressful deadlines and projects
- Spending a lot of time with colleague and clients that have different personality types

Communication

- Base your communication style off of the person that you're speaking with.

- Be upfront with your capabilities
- Your supervisors want you to ask questions
- Get comfortable saying no if you don't have capacity
- Communicate if you are not able to meet deadlines before missing the deadline.

Relationships

- Building relationships at work can be challenging
- Many firms have programs that connect you with a mentor/buddy
- Working in a team
- Emotional intelligence is key

Taking and Giving feedback

- Making mistakes is ok
- Use feedback as a learning opportunity
- Giving feedback to your team or those in “higher” position can feel challenging
- Your feedback at a firm will be different than in the classroom

Time management

- Self awareness - do a time audit
- Avoid multitasking
- Write it down and keep it in front of you
- Schedule yourself
- Be upfront about your availability

Career Growth

- Keep a running list of your accomplishments
- Reach out to experienced co-workers; many are willing to share their experiences and tips
- Recognize what soft skills you need to work on
- You may not know exactly where you want to be in 5 years, so share your goals with your seniors
- Professionalism takes practice!

Wrap up

- Communicating effectively can help you leave a good first impression and with building relationships
- It takes time to understand your work environment. Act as a sponge for your first few weeks

Questions

How was your transition during Covid?

Leaders at every step communicated and dissected info they were given and gave it to us so we understood. They gave encouragement thi those working from home, totally understanding of people's covid preferences. Some offices are about 90% back in, while some are still mostly at home. Still, the same level of communication is there.

Im a little shy in a new place, how was it communicating in a new setting on your first day at CBIZ? Just know that on your first day, you'll have peers with you who also don't know

anything. If you are open with your concerns, it will open their concern too. Asking questions will help you break the ice and feel more comfortable. You'll be able to build friendships

Are the CPA requirements different for Forensics? For forensics, it's not required, but they will still pay for the prep you need. Getting a CPA or a CFA is encouraged, those credentials will give you more credibility. Everything in Forensics is about credibility. A lot of staff don't have it or pursue another license, but if you're in the mode of studying, it's best to take advantage of the resources and knock it out. There are plenty of people going along with you. Completing it within the first year gets you about a \$5000 bonus. We can also reimburse tests you've taken before joining the firm. CBIZ is one of the top groups for Forensics in the state.

Is there a way I can stay in touch as a first year? Fill out our QR code and reach out to Lindsey, and she will keep you informed about recruiting events! Deadline to apply for those who are eligible is March 11th