THE BENEFITS OF NONWORKPLACE MENTORS

Meet Paulina Rodriguez

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Two studies point to HIGH DEMAND FOR ACCOUNTING PROFESSIONALS

ACCOUNTING FOR GOOD

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<tr>
<th>Date</th>
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*8 CPE CREDITS
*unless otherwise noted
One of the many reasons for obtaining the CPA license is its versatility—CPAs have a wide variety of careers from which to choose. In fact, one of them involves carrying a badge and a gun. In the cover story of this issue of NextGen, the spotlight is on Paulina Rodriguez, a special agent in the IRS Criminal Investigation Division. Rodriguez uses her auditing skills and business background, along with her criminal investigation training, to find and arrest tax cheats, identity thieves, money launderers and other financial criminals.

Those with a bent toward not-for-profit work can also find great opportunities with their CPA background. Another CPA profiled in this issue, Jason Camorese, is the chief financial and operations officer at Scenic Hudson, an environmental organization that works to preserve natural areas and create parks in the Hudson River valley. His focus on not-for-profit work while at a public accounting firm provided him with the knowledge and experience to make the transition to a leadership position within the organization.

Of course, we know that many of you will follow more traditional paths and spend at least some time in public and corporate accounting. Some of you may need the advice and counsel of professionals outside the office. That’s why we’ve included an article addressing the importance of outside mentors. And for those of you concerned about integrating work with the rest of your life, this issue also looks at how some firms have initiated programs to address workplace stress, including flexible work schedules, exercise programs and group meditation.

For new and aspiring CPAs who want to advance in the profession, I can’t recommend more highly the benefits that you’ll receive by joining the NYSSCPA. When I was an accounting student, an accounting professor suggested that I join. And I’m so glad that I did. I started attending a number of events at the Society, where I met its friendly and accomplished members. Members and staff then suggested that I join committees, so I did that, too. I also started to attend conferences and assume some leadership roles. I became co-chair of the Manhattan/Bronx Chapter’s NextGen Committee, which led to my current role as chair of the statewide NextGen Committee.

I joined the Diversity and Inclusion Committee, as well as two technical committees and the NYSSCPA Toastmasters Club. Belonging to the Society—and particularly its committees—is an excellent way to establish connections and improve your skills. In fact, a partner at my firm told me that joining a committee at the NYSSCPA not only helped him build his book of business, but also allowed him to become more knowledgeable in his specialty.

I urge those of you who aren’t members to attend an upcoming Society event and learn for yourself what the Society has to offer. Coming up this fall will be our Annual Whiskey Tasting Networking Night on Nov. 18. I also urge you to attend the Society’s second annual Women’s Leadership Forum on Jan. 29, 2020. If you are already a member, encourage your friends and colleagues in the profession to attend an event and find out about the many benefits of membership. As with the CPA license itself, Society membership offers the opportunity to diversify your skills and expand your career options.

Michael R. Durant, CPA
Chair, NYSSCPA NextGen Committee
mdurant@cpa.com

Let us know what you think
Tweet us at: @nysscpa #NextGen
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Initiatives to improve health include group meditation; an emphasis on teamwork, both at the office and in extracurricular sports; trips to concerts and the theater; and flexible work schedules.

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Outside mentors can help with sensitive matters that you don’t necessarily want to share at work, such as frustrations with your supervisor, or whether to take a position at another company. They can also offer hard critiques that those you work with may not be comfortable sharing.

19 Accounting for good
As chief finance and operations officer at Scenic Hudson, Jason Camporese steers the group in its mission to preserve land and farms, and create parks that connect people with the inspirational power of the Hudson River.

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“Think about if the life you’re living now is worth the price you’re paying to live it, and what your true definition of success is.”
—Cecilia Tse, director, PwC
See work-life balance story on page 8.
An analysis by the *Wall Street Journal* of over 800 different jobs projects that accountants and auditors will be the 19th most promising profession in the next decade. Jobs were ranked based on the average of annual occupational openings, projected until 2028, and median salaries for 2018.

For accountants and auditors, the median 2018 salary was $70,500, and the projected annual openings until 2028 are 146,000, making it number 19 on the list. Total employment in this field is projected to grow from 1,424,000 in 2018 to 1,514,700 in 2028, an increase of 6.4 percent. This analysis echoes the findings of the *Robert Half 2020 Salary Guide*, which found that demand is high and supply is low for qualified professionals in both corporate and public accounting.

That guide, compiled by job placement firm Robert Half International Inc., reports that the balance of power is favoring workers in corporate and public accounting, as employers are scrambling to find qualified professionals who are in short supply. This situation, in turn, has led companies and firms to make extra efforts to appeal to potential candidates, including flexible scheduling and telecommuting options.

In public accounting in particular, said the guide, skilled candidates are often entertaining multiple job offers at once, and even entry-level candidates can command incentives they would not have been offered just a few years ago. Because of this development, while job seekers are still looking for positions at large public accounting firms, they are increasingly willing to take their talents elsewhere if they’re unhappy, especially where it concerns work-life balance, which continues to be a major priority for new hires. (See story, page 8.)

Candidates are also showing more savvy in salary negotiations, and have become more willing to walk if compensation is not at the levels they’d prefer. They’re also more concerned about a company’s culture, with 35 percent of workers saying they’d turn down a job offer, even if the role was a good fit, if they were not comfortable with company culture.

Continued on page 5
FALL/WINTER EVENTS
Here are some upcoming events of interest to new and aspiring CPAs. For more information and to register, visit nysscpa.org/fae.

October

NYSSCPA Toastmasters Club
Tuesday, Oct. 22, 6:15–7:45 p.m.
NYSSCPA offices, 14 Wall St., New York
Cost: Free for members
Course Code: 48151012
Next meeting date: Nov. 19; future dates TBA

Diversity and Inclusion Conference
Wednesday, Oct. 23, 1:30–6 p.m.
NYSSCPA offices, 14 Wall St., New York
Cost: $100 members; $150 nonmembers
Course Code: 25700011

Nassau/Suffolk Chapter Celebrate Oktoberfest Networking Event
Thursday, Oct. 24, 6–9 p.m.
Black Forest Brew Haus, 2015 New Highway, Farmingdale
Cost: $55
Course Code: 45030006

Westchester Chapter Accounting Recruitment Event
Thursday, Oct. 24, 6–8 p.m.
Cambria Suites, 250 Main St., White Plains
Cost: Free for students, but registration is required
Course Code: 45110003

November

Suffolk Chapter Student Night
Tuesday, Nov. 5, 6:30–9 p.m.
Dave and Busters, 1856 Veterans Memorial Highway, Islandia
Cost: Free for students
RSVP to rhuether@kpmg.com

Cannabis Conference
Wednesday, Nov. 6, 8:30 a.m.–5 p.m.
Baruch College, 55 Lexington Ave., Vertical Campus, 14th Floor, Room 14-220
Cost: $300 members; $400 nonmembers
Course Code: 25809011

NextGen Committee Meeting
Thursday, Nov. 21, 4:30 pm
NYSSCPA offices, 14 Wall St., New York
Future meetings will be held on Dec. 19; Jan. 23, 2020; and Feb. 20, 2020

Annual Whiskey Tasting Networking Night
Monday, Nov. 18, 5:30–7 p.m.
NYSSCPA offices, 14 Wall St., New York
Cost: Free for members; $25 nonmembers
Course Code: 48151011
For more info, go to nysscpa.org/whiskey19

Suffolk Chapter Attorneys and Accountants Networking Mixer
Tuesday, Nov. 26, 6–9 p.m.
The Fox Hollow, 7725 Jericho Turnpike, Woodbury
Cost: Free
Course Code: 45030003

January

Women’s Leadership Forum
Wednesday, Jan. 29, 2020, 8 a.m.–5 p.m.
Venue to be announced
Cost: $275 members (Early Bird: $225 by Jan. 8); $325 nonmembers (Early Bird: $275 by Jan. 8)
For more info, go to nysscpa.org/WLF20

February

Committees Networking Night
Thursday, Feb. 6, 2020, time to be announced
NYSSCPA offices, 14 Wall St., New York
Cost: Free for members
For more info, go to nysscpa.org/fae

Save the date:
Tuesday, May 5, 2020
Tacos & Tequila Networking Night
More info to come at nysscpa.org/fae
High demand
Continued from page 3

Technological skills are becoming more important, too. Across the board, employers are increasingly seeking out candidates with technological proficiencies, especially those having to do with cloud-based systems, data analytics and database management software, ERP systems, Excel, industry-specific software and, for small and midsize businesses, QuickBooks. Because routine tasks are becoming more automated, employers are placing a premium on excellent soft skills such as critical thinking, communication, business acumen and problem-solving.

Overall, the guide describes the current state of the industry as one where skilled candidates can “write their own ticket.”

Women projected to become majority of college-educated workforce this year

By CHRIS GAETANO

This year, for the first time, women are expected to make up the majority of the college-educated workforce, a development that could alter how companies structure benefits packages and other practices, according to the Wall Street Journal.

Women have made up the majority of bachelor’s degree holders since the 1980s, a proportion that has only grown since then: Ever since the late 1990s, about 57 percent of degree holders have been women. Yet, it took until the late ’90s before they represented 45 percent of the total college-educated labor force, and until 2013 to reach 49 percent.

This steadily increasing proportion of women has led to changes in the types of benefits companies offer. For instance, the Journal notes that, between 2015 and 2018, the number of companies offering egg freezing as a benefit grew from 6 percent to 17 percent.

Companies offering paid parental leave, meanwhile, rose from 24 to 40 percent in the same time period.

Meanwhile, a recent article on CNN Business says that the future will not only be female, but it will also be single, as projections show the proportion of working women aged 25 to 44 is set to reach record proportions. As of last year, 41 percent of working women in this age range were single, and by 2030, Morgan Stanley analysts believe this figure will rise to 45 percent, which will be the largest share in history. The financial firm said that because single women tend to outspend married women—and in different places—this shift will start having an impact on the shape of the economy. For instance, the analysis said that single women tend to spend more on footwear, personal care, food, luxuries and electric vehicles than married women. The firm advised companies to keep this demographic change in mind when considering strategic decisions and workplace benefits.

MEDIAN SALARIES
for some corporate accounting positions—from starting to senior

<table>
<thead>
<tr>
<th>Title/Experience</th>
<th>Median Salary</th>
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<tbody>
<tr>
<td>Internal auditor, up to 1 year</td>
<td>$48,000</td>
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<tr>
<td>Internal auditor, 1 to 3 years</td>
<td>$73,500</td>
</tr>
<tr>
<td>Senior internal auditor</td>
<td>$90,250</td>
</tr>
<tr>
<td>Tax accountant, up to 1 year</td>
<td>$54,250</td>
</tr>
<tr>
<td>Tax accountant, 1 to 3 years</td>
<td>$73,500</td>
</tr>
<tr>
<td>Senior tax accountant</td>
<td>$90,250</td>
</tr>
<tr>
<td>General accountant, up to 1 year</td>
<td>$48,500</td>
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<tr>
<td>General accountant, 1 to 3 years</td>
<td>$64,250</td>
</tr>
<tr>
<td>Senior general accountant</td>
<td>$80,500</td>
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</table>

Source: Robert Half 2020 Accounting and Finance Salary Guide. These figures are national ranges. Bonuses, benefits and other forms of compensation are not built into the starting-salary ranges. Compensation is affected by many factors, including labor market demand for the position and individual negotiation during the hiring process.
Company culture makes a big difference

By CHRIS GAETANO

A recent survey of 5,000 adults in four countries has found that company culture has a major role in determining where people decide to work. The survey, conducted by job and recruiting site Glassdoor, Inc., found that more than three-quarters (77 percent) of adults would consider a company’s culture before applying for a job there, and well over half (56 percent) say company culture is more important than salary when it comes to job satisfaction. This is particularly the case with younger workers: Millennials are more likely to place culture above salary than those age 45 and older in two of the four countries surveyed: the United States (65 percent vs. 52 percent of those older than 45) and the United Kingdom (66 percent vs. 52 percent of those older than 45).

Culture is also a significant reason why people stay in their jobs. The survey found that 65 percent of employees say their company’s culture is one of the main reasons for staying in their job. Conversely, 71 percent of global employees would look for a job elsewhere if their current company’s culture were to deteriorate. “Having a compelling mission, culture and values are critical when it comes to attracting and retaining top talent in a competitive job market—it is what differentiates each and every employer,” said Christian Sutherland-Wong, Glassdoor’s president and COO. “Across the countries we surveyed, it’s clear that job seekers are seeking more meaningful workplace experiences. Job seekers want to be paid fairly but they too want to work for a company whose values align with their own and whose mission they can fully get behind.”

NASBA to End Testing Windows

By CHRIS GAETANO

Testing windows for the CPA exam will soon be a thing of the past, due to a rule change approved in April by the National Association of State Boards of Accountancy (NASBA).

Right now, there are only a few times a year when one can take the CPA exam. If candidates fail a section, they cannot retake it until the next testing window, which could be months away. So, for example, if someone took a section of the exam in July, and received word that they failed in August, they would not be able to retake it until October, when the next testing window begins.

In April, however, NASBA’s board of directors approved a change to the Uniform Accountancy Act Model Rule—which state boards use as a guide for CPA licensure across the country—that aims to end testing windows by next year. Specifically, according to the revised rule, “a Candidate can retake a Test Section once their grade for any previous attempt of the same Test Section has been released.” This means less waiting time between when a candidate fails a section and when that person can retake it again.

The revised rule’s implementation will be contingent on the approval of individual state boards, as well as whether there are sufficient IT resources to make the transition. NASBA is planning to end the use of testing windows and begin continuous testing nationwide by June 30, 2020.
Wave of CFO retirements means opportunities for new blood

By CHRIS GAETANO

A large number of America’s CFOs are set to reach retirement age, which, according to CFO.com, means big opportunities for professionals looking to fill the void. This prediction is based on a 2016 study by management consulting company Spencer Stuart, which found that the average retirement age for a Fortune 500 CFO was 58.2, while the average current age of Fortune 500 CFOs is about 56 this year. Spencer Stuart believes that the earlier retirements are being driven by a combination of the growing demands of the CFO role, recent wealth creation and a rise in the number of opportunities for CFOs to serve on outside boards. This means that, over the next two years, corporations will likely see a wave of CFO retirements, opening up a large number of high-powered career opportunities for younger professionals. CFO.com said that those eyeing the corner office should seek board exposure first and foremost. Beyond that, they should also familiarize themselves with how to run an effective capital project; lead a mergers-and-acquisitions deal; and engage in high-level strategic planning, skills that are increasingly expected of today’s CFOs.

Source: Spencer Stuart

CFO demographics and diversity

According to Spencer Stuart, women now represent slightly less than 13 percent of Fortune 500 CFOs, a significant increase from 6.8 percent in 2006. The representation of ethnically diverse CFOs has doubled since 2006 to 6.4 percent. Progress may accelerate in the future, as many organizations are focused on building a more diverse talent bench for the CFO role, for example, by prioritizing female and diverse candidates for the CFO’s direct reports.

CFOs in the Fortune 500

<table>
<thead>
<tr>
<th>Year</th>
<th>Female CFOs</th>
<th>Ethnically Diverse</th>
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<tr>
<td>2006</td>
<td>6.8%</td>
<td>3.3%</td>
</tr>
<tr>
<td>2011</td>
<td>10.2%</td>
<td>4.3%</td>
</tr>
<tr>
<td>2016</td>
<td>12.5%</td>
<td>6.4%</td>
</tr>
</tbody>
</table>

Source: Spencer Stuart
As people in various industries around the world strive for greater work-life integration, employers are increasingly recognizing that striking the right balance is crucial for the physical and mental health of individual workers, in addition to their productivity and their quality of life.

Study after study has shown that overwork—and resulting dangerous habits, like sleep deprivation—have ripple effects that reach far beyond the office, potentially affecting an employee’s cognitive abilities, immune system, respiratory system, risk of heart disease, sex drive and relationships. What’s more, being overworked can affect one’s ability to even notice these effects. Sleep deprivation, for example, has been scientifically compared to being drunk at work. Debates are ongoing about whether the trend toward overwork is more the product of individual choice or cultural pressures.

As research mounts, the accounting profession is taking steps to encourage a healthy workforce. And the next generation of young professionals is thinking about this early on—even as they begin searching for their first jobs. Job seekers often lean toward companies that offer flexible work schedules and the opportunity to work from home, especially those who plan to start families.

“Think about if the life you’re living now is worth the price you’re paying to live it, and what your true definition of success is,” said Cecilia Tse, a director at PricewaterhouseCoopers, during a panel discussion on work-life balance at the NYSSCPA’s Women’s Leadership Forum this past January. PwC, a Big Four firm, is just one of the companies that have incorporated mindfulness and meditation into their infrastructure. (You can watch the full panel discussion at nysscpa.org/worklife19.) What is clear is that this conversation has been happening at all levels of the profession for years now, and it seems to be adapting as the dialogue progresses. NextGen spoke with leadership and staff members at various levels in order to get a picture of how accounting firms are responding to evidence that the global workforce could be far healthier than it is. Initiatives to improve health include group meditation; an emphasis on teamwork, both at the office and in extracurricular sports; trips to concerts and the theater; and flexible work schedules.
Health matters

“We’re talking about work-life integration, but we treat the ‘life’ part of things like life is a gift for getting your work done correctly,” said Rumbi Bwerinofa-Petrozzello, a sole practitioner who worked at Deloitte before starting her own company, Rock Forensics, LLC, in Queens, N.Y. “And we’re doing this despite some of the horror stories we’ve heard about what happens when we’re overworking ourselves.”

The state of health within the workforce made headlines this year when the World Health Organization (WHO) announced that it had added a detailed “burnout” classification to its 11th Revision of the International Classification of Diseases (ICD-11). The syndrome is now categorized as an “occupational phenomenon.”

Around the world, both detachment and obsession plague the workforce, and the impact on health is indeed multifaceted. Yet this is not a new area of study. In 2009, the American Journal of Epidemiology published its widely cited “Long Working Hours and Cognitive Function: The Whitehall II Study.” It sampled 2,214 participants—1,694 men and 520 women—working in 20 London-based civil service departments, their ages ranging from 35 to 55. The study associates long hours (more than 55 hours a week) with “cardiovascular disease and immunologic reactions,” along with diabetes and depression.

The study also reports that “deterioration in cognitive performance, including impaired grammatical reasoning and alertness, has been found in post versus pretest conditions among employees working 9- to 12-hour shifts compared with a traditional 8-hour shift.” And, even when accounting for potential compounding factors like education, occupation, smoking and pre-existing diseases, “[w]orking more than 55 hours per week was associated with lower scores on two of the five tests of cognitive function,” the study found. “Furthermore, long working hours predicted decline in performance on the reasoning test over a five-year follow-up period.”

According to Johns Hopkins sleep researcher Patrick H. Finan, Ph.D., those experiencing sleep deprivation are 33 percent more likely to develop dementia, and 48 percent more likely to develop heart disease—the leading cause of death worldwide in the last 15 years, according to the WHO. And, according to a 2000 study in the Journal of Occupational and Environmental Medicine, “Moderate sleep deprivation produces impairments in cognitive and motor performance equivalent to legally prescribed levels of alcohol intoxication.” Never mind that employees’ poor health can affect their work, hurt the company’s bottom line, and potentially drive up health insurance costs.

“It just makes sense—sick people don’t perform well,” said Bwerinofa-Petrozzello, who recalls social situations, both work-related and in her personal life, where people would tout their lack of sleep and nonstop work schedules as a “badge of honor.” She added, “It’s a very pervasive culture. It’s so New York.”

Firms focus on well-being

With unparalleled resources at their disposal, the Big Four firms—KPMG, EY, PwC and Deloitte—have responded to the mounting research with dramatic changes in recent years.

These include offering flexible work schedules, nourishing employees’ physical and mental health through incentivised exercise programs and group meditation at the office, and offering organizationwide support systems in the form of assigned teams and psychological counseling services.

“Our profession involves a lot of hard work,” said Harry Argires, KPMG’s national managing partner of audit operations, in a written statement. “Our early career rewards program provides an annual ‘perks’ reimbursement to help pay for a variety of personal expenses—from student loan payments [and] electronics to food delivery and gym memberships.”

He added that the firm offers “help finding emergency backup child and adult [and] elder care, paid volunteer time, and an online database for assistance finding a nanny, housekeeper, or caregiver” for working parents who need additional support.

Herb Engert, managing partner of EY’s New York City office, promotes the company’s...
“Better You” program, which offers a companywide, holistic approach to wellness for employees. This ranges from reimbursing employees for their gym memberships, to offering smartphone apps like Sleepio, which offers users an individualized “sleep improvement program” by monitoring and tracking their sleep patterns after they’ve taken a preliminary online sleep quiz.

“With stress and anxiety, sleep challenge is clearly one of the outcomes,” said Engert. “We’ve really taken this to heart.” And those looking for a real person to talk to for emotional and psychological support can reach out to the company’s EY Assist program, which connects employees with dedicated counselors. Private counseling services have also spread through the profession outside EY.

But Engert also looks to the arts and entertainment as a form of medicine for staff, and recently organized “an arts club and community” that began meeting this summer. Engert described the group’s recent trip to see Ain’t Too Proud on Broadway.

“We had arranged for a private meeting with the cast afterward, to do a group discussion with the cast about the show,” said Engert. “I think it’s not only important for people to experience the arts, but it’s important for them to be able to collaborate and discuss it in a small-group format. And we’re going to continue both on the theatrical side and the fine arts side.”

Similar to EY’s program, PwC’s “Be well, work well” initiative is a means of creating “sustainable work habits and life habits,” said Anne Donovan, PwC’s people experience leader. PwC employs a meditation and sleep app called Calm—and it’s not just for staff members to use privately.

“I was in an all-day meeting yesterday with my team, and the afternoon was getting long, and I said, ’Time out,’’ Donovan related. “It was raining outside, it was kind of cozy in the conference room, and we did a nice, 10-minute meditation. And I’m telling you, it changed the whole meeting. It re-energized the whole thing.”

The Calm app was one of several ideas that have been introduced to the company through its biannual “town halls,” Donovan said. “At this last one, which was in May, we had the Calm CEO join us, and talk to us about the benefits of meditation, and he actually led a firmwide, two-minute meditation.”

Deloitte has its own analogous program—“Empowered Well-being”—which includes a tool called Vitals.

“Vitals is an interactive, user-friendly dashboard that provides a more complete picture of hours worked and traveled, and PTO usage, by pulling data from existing systems,” said Jen Fisher, the firm’s U.S. chief well-being officer. “With these insights, coaches and coachees can discuss energy levels and develop solutions together to address personal and professional well-being before burnout occurs.” The dashboard also provides training in a number of areas, including meditation.

But the emphasis on mindfulness, community and team building is not limited to the Big Four, as firms of all sizes are taking these ideas increasingly seriously, and offering many of these same perks to their employees. Katelyn Kogan, a senior manager at Mazars USA LLP, a midsized firm, said that the organization offers perks to help employees working in tax get through their busy season.

“They do pilates classes, there are meditation sessions, they bring in massage [therapists] sometimes, and [there are] a bunch of happy hours for people to get a break,” Kogan said. “Outside of busy season, we have volunteer days, which people really like. We have quarterly office outings, and a bunch of other fun events interspersed throughout the year.”

Moreover, the importance of teamwork is apparent internally at firms and has contributed to the prevalence of flexible work schedules—a hallmark of work-life integration and, perhaps, one of the most transformative shifts in modern workplace culture.

The power of flexibility

“We work, very much so, in a teaming environment in the Big Four—especially at EY—and what I’ve learned throughout the years is that the teams that are figuring out how to work flexibly are the highest performing teams,” said Greg Rose, a senior manager in EY’s tax group. “And it all boils down...
Finding balance outside of work

Amanda Hines, a tax manager at PwC, said that while she initially struggled tremendously to find balance in her career, she eventually found meaning in mentorship.

“I always work out before work, so the actual physical part of wellness, I think I’ve been implementing since I started,” Hines said. “Mental and spiritual wellness was probably missing. ... As much as I love tax, I don’t think that I was feeling superfulfilled in terms of feeling like I was making a huge difference in the community, and in the world.”

So she sought balance outside of work, which began with getting in touch with her roots.

“I work with girls from my hometown all year long,” coaching volleyball and advising them on their futures post-high school, Hines said. “In the fall, I help coach the high school team, and in the winter and spring, I coach the middle school team. So, in order to make the practices and games, this requires me to leave [work] early sometimes, and maybe make up the work on the back end, or work a few hours on the weekend in order to get my client work done.”

In the past five years, the girls she’s coached in middle school have moved on to high school, where she has continued building those relationships.

“And you kind of become more than just a coach to them—more of a mentor; and every year, I help with college essays; and every year, in college, the girls send me their résumés to look at; and people have shadowed me here,” she said. “I think that was the one thing I was missing ... and probably has helped with my mental wellness. Feeling like I’m helping people. Like I’m giving back.”

to having the right leaders talking about flexibility and teaming ... to have this culture of anybody, from staff to partner, being able to work how they want work, so everybody can work toward their mutual goal.”

For Laura Collins, a senior manager in audit at KPMG, work-life balance became that much more important when she had children.

“I have two little girls; they’re 2 and almost 4,” Collins said. “So, for me, feeling like I have a good balance is putting them to bed at night; being able to be at soccer, gymnastics and preschool graduation; and not feeling a constant pull to be somewhere else. It means being viewed as a high performer at work, and being able to spend appropriate time with my clients and my staff.”

Collins spoke highly of the firm’s Team of Choice program, wherein teams collaborate on a “blueprint of what work-life balance means for them,” and build flexible but coordinated work schedules around that, she said. “My team, in particular, has a shared calendar, so we see that, ‘Wednesday night, you’ve got basketball league; or daycare pickups; or weddings.’ So, we can see what’s important to everybody, and build our plan around that.”

Kogan had her first child earlier this year and echoed Collins’ sentiment on the value of flextime. Her firm has also established Women@Mazars in an effort to spread the word that the field of public accounting is full of flexible work opportunities for women, even if they plan to have children.

But Kogan asserted that, while working professionals should always be focused on developing healthy and balanced work habits, they should also be focused on building reputations as hard workers early in their careers, “So you can have room to step back and have that flexibility later as the needs arise, whether that be to go back to school later on, or start a family, or address health concerns—whatever you might need in the future,” she said. “You may not need that flexibility early on. It may not be in your interest to work from home two days a week in your first job. But it is important to go to a company where you know that those are options when you need them.”

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IRS Special Agent **Paulina Rodriguez** uses CPA skills to fight crime

**BY CHRIS GAETANO**

**PHOTOGRAPHS BY LEE WHITE**

Like many CPAs, IRS Special Agent Paulina Rodriguez analyzes vast amounts of financial information to find the real story behind the numbers. Unlike many CPAs, she does so not for the sake of one particular client, but for the public as a whole, as she uses her skills to find and arrest tax cheats, identity thieves, money launderers and other financial criminals. For Rodriguez, it’s a great way to use the skills she learned as a CPA to serve the American public.

“I get that an auditing firm is very prestigious, but, at the end of the day, here you’re arresting people [involved in financial crimes], and not just tax [crimes]. A lot of crimes involve money, and IRS special agents follow that money; being a CPA with that accounting background helps you find it,” she said.

Rodriguez, Brooklyn born and raised, grew up with two sisters in a family that highly prioritized education. With neither parent having finished high school, they each emphasized the importance of earning a degree to advance in the world, a lesson Rodriguez took to heart. She discovered her affinity for accounting through an older cousin who was a CPA working at a Big Four firm, as well as through the accounting classes she took in high school.

“I enjoyed it, having those balance sheets balance. It was exciting,” she said. Rodriguez did not start out pursuing a career in law enforcement. Like many young accounting majors, she initially looked to the private sector for her future, and her experience seemed to be on track to eventually deliver her there. While still an undergrad-
IRS Special Agent
Paulina Rodriguez
At Baruch College, she was already working a full-time job in banking—first as an accounting clerk, then as a portfolio manager and then as the supervisor for the entire department—while she took classes at night. She remembered the route her cousin took and thought it was a good model for her own.

Then, one evening, she went to a career fair, where she met representatives from the IRS Criminal Investigation Division (IRS-CI), who told her how she could use her skills to fight white-collar crime. While she’d never really considered government work before, she found the idea very exciting, and the experience opened her eyes to alternate paths besides shooting for a spot at a top audit firm. Very swiftly, she became determined to become an IRS special agent. But it didn’t happen overnight. While she checked USAJobs.gov religiously, there weren’t any openings for new IRS special agents when she began looking. Undeterred, she decided instead to join the FBI, where she eventually became a forensic accountant, a position that she said was great exposure for the kind of work she wanted to do eventually. All the while, she’d continually check for any openings at the IRS.

“I kept waiting and waiting and waiting, but then a posting came out in 2009 for an IRS special agent job, and I got the call in 2011, and I’ve been on board since then,” she said.

Much like becoming a CPA, the process of becoming an IRS special agent requires a lot of training and tests. Beyond the educational and work experience requirements that she said are “more or less what CPAs have,” aspiring special agents have to complete two types of training. The first is criminal investigation training, which focuses on topics such as how to conduct arrests, execute search warrants, enter buildings safely and fire a gun with accuracy. The second training is more specifically focused on the financial aspect of the work, and it covers matters such as the different kinds of tax crimes and what kind of evidence is needed when investigating them.

Rodriguez said that IRS-CI is the only law enforcement agency with the authority to investigate and recommend prosecution against taxpayers for federal tax crimes. No other agency has that authority. “Also, this year is the IRS Criminal Investigation Division’s 100th anniversary as a law enforcement agency,” she said, “and we are very proud and excited to be working for the agency during this historic occasion.”

While the accounting and law enforcement worlds may seem very different from each other, Rodriguez said that both require an eye for detail, a skeptical mind, an analytical personality, the ability to work both alone and on teams, and lots of patience. Not that the two are completely the same, however. Rodriguez described a job that is a little more active than what many CPAs imagine. Yes, there are thousands of pages of bank records. There are also interviews, surveillance and digging through trash.

“She’re responsible for a case and how it moves, so I need to figure out what I need to complete the case. Whether working with others for interviews, doing trash runs (one of our investigative tools) or conducting search warrants, I need to think of how I can get evidence to complete a case,” she said.

While some of her colleagues travel a lot, going as far as Colombia or Thailand, Rodriguez specializes in employment fraud, which keeps her mostly in the New York City area. Although every day is different, she said an average day might involve reviewing and analyzing records such as bank statements or business contracts, interviewing people associated with a case, or doing drive-by surveillance to identify certain people. Overall, she said that the IRS expects special agents to work an average of about 50 hours a week, but generally, there’s a good deal of flexibility.

People come into IRS-CI with all sorts of different skill sets, but her accounting background is invaluable when she wants to “pick up a rock and see what’s under it,” she said.

“You have that auditor mindset, that business background, where you analyze financial records from businesses and individuals and see money moving everywhere. Having that analytical background helps with that a lot; you can see that this money moved twice, and this here isn’t the same money. [It’s easy] for you to see, but people without that background may not notice it right away,” she said.

Rodriguez’s very first case involved all of these skills. She was about three months out of her training and was assigned to an identity theft and money-laundering case. There was
a man in the Bronx who, she discovered, was cashing millions of dollars in Treasury checks and laundering the money through various businesses.

“So, I had to go back and identify each check, where it went, who was involved, how it was paid out, who was getting what—I even had to check the back of the check to see if it was endorsed. You would go to check-cashing places and follow the money, and at that time, you’re approaching every criminal you come across,” she said.

The investigation eventually culminated in an undercover operation late one evening in the Bronx, where Rodriguez and other agents eventually managed to arrest the suspect. It was, she said, her first real exposure to the world of law enforcement.

“It’s different from thinking about a what-if scenario. Now you’re in real life, in the street, and people may potentially have firearms, but you do, too. It was a sketchy neighborhood, and you’re doing these undercover buys of Treasury checks and Social Security numbers. That was a huge test for me. That was out of my normal [experience]. And I felt comfortable. I thought, ‘I can actually do this,’” she said.

Rodriguez said that the IRS is a great place to go to exercise a specialty in the service of the public good, and she encourages accounting students to investigate careers with the federal government. She stresses the importance of an internship, if someone wants to eventually become an IRS special agent like her one day, saying that already being familiar with how federal agencies work and how special agents do their jobs will be a great help in future opportunities. The IRS does important work, and Rodriguez said that it’s a great environment for anyone who wants a job with a purpose.

“You’re serving the American public. You have a purpose. And that role is very important, so coming to the government will be a great job,” she said.
Having a mentor can make a significant difference over the course of someone’s career. Numerous academic studies have found links between mentorship and improved rates of promotion, compensation and overall career satisfaction. One 2004 study, in the Journal of Applied Psychology, used meta-analysis of existing research to reach findings that were generally supportive of the benefits associated with mentoring.

While many companies have formal mentorship programs, including each of the Big Four accounting firms, what if you’re at one of the firms that don’t have one? Or what if your firm isn’t offering the type of help and support you really need? At a certain point, it might be better to look outside your company for a mentor.

Ellen Ensher, a management consultant and professor who co-authored the book Power Mentoring: How Successful Mentors and Protégés Get the Most out of Their Relationships, said that mentors need not be exclusively internal or external, and that, ideally, professionals should have multiple mentors, both in and out of their firms.

“All of my research is based on the belief and idea and proof that it’s best to have a network of mentors, so take advantage of what your organization offers, but in addition to that, look outside your organization to have different types of mentor,” she said. “It’s good to have someone literally a year or two ahead of you, careerwise, [someone] at the same level who has complementary skills and perspectives, [and someone who is] further along and can sponsor you.”

NYSSCPA Past President J. Michael Kirkland, who made mentoring young professionals a major part of his own career, raised a similar point, saying that having an internal mentor and sponsor is key to success within a firm, but, at the same time, so is having an outside mentor who can be candid in ways that people within your own organization cannot.

“Particularly for students and young people starting out, you need to understand the different types of mentors out there: There’s the mentor at work that helps you maneuver through the organization, there’s the key mentor that sponsors you to help you get that promotion, and
then there’s the person you go to, a confidant, ... outside of work, to get some really hard advice,” he said.

Discussions with outside mentors could involve sensitive matters that you don’t necessarily want to share at work, such as frustrations with your supervisor, or whether to take a position at another company. They can also include hard critiques that those you work with may not be comfortable sharing, such as those pertaining to professional dress, work ethic or communication style. Kirkland noted that, in any kind of mentoring relationship, you have to be prepared to hear these sorts of hard truths and make an effort to change, saying that mentors are not signing up to be your cheerleader.

Both he and Ensher noted that outside mentors need not necessarily be CPAs themselves. Professionals in CPA-adjacent fields such as banking, law and finance can also provide good insights, particularly given their outside perspective. Ensher added that, even beyond these realms, depending on the type of guidance you’re looking for, an outside mentor could be just about anyone you look up to and admire, observing that we can use mentors in all areas of our lives.

There are many ways you can look for an outside mentor. Beth van Bladel, a career CFO and a member of the Private Company Council—the primary advisory body to the Financial Accounting Standards Board on private company matters—said that she was proactive about finding mentors when she first became a CFO. Noting that, “when you’re CFO, you’re a CFO of one in an organization—you don’t have anyone to go to,” she started a CFO Committee within the NYSSCPA’s Northeast Chapter as a way to gather together CFOs in industry to share their insights and challenges with each other as a sort of peer mentoring exercise.

“I started that committee because I needed a mentor specifically, and what’s wonderful about our committee is we have CFOs at all stages of their careers—they’re just starting out or they recently retired or in the middle, and we come out regularly to talk about what we’re going through and problems we’re trying to solve at our companies,” she said.

She added that she also makes it a point to reach out to speakers or writers who, she thinks, made particularly good points, to see if they want to meet for coffee, a practice that, she pointed out, is very similar to the principles of networking.
Denise M. Stefano, chair of the accounting department at Mercy College, pointed out that school alumni networks can also be great resources for finding mentors. Her own school, she said, maintains a strong connection with its alumni and, in fact, has a formal mentoring program through that network. Most likely, other schools have similar programs and so might be good places to look. Yet she recommended against just looking someone up and cold calling—instead, she said, you should find some sort of connection, ideally, a mutual acquaintance who can make an introduction, such as someone from your college.

“I’ve done that a lot, where students had questions [about] what they needed to do to get a job at a particular firm, and I reached out to people at the firm for the students I knew … to connect them and feel more comfortable,” she said.

Kirkland noted that the same principles can apply to LinkedIn, which, he said, is another powerful tool for finding mentors, pointing to his own personal experiences.

“A young lady from Queens University, someone who worked for a firm, found me on LinkedIn, looked at my bio and thought it was interesting, and thought I could offer something, and so she just sent me an email. Just asked, ‘Mr. Kirkland, this is my issue; can you share some advice?’ and I did,” he said. While not everyone will answer back, it can still be worth it to reach out.

Finally, Kirkland pointed to another rich vein of professional guidance: the NYSSCPA. He advised young members to join committees, get involved with their local chapters, and make it a point to go to events and meet as many people as possible. Ask questions about what they do, exchange business cards, and ask about reaching out to them later to talk more.

“The State Society is one of the best places to go to make that connection outside of school, outside of work, that can put you in contact with so many different places,” he said.
As Jason Camporese walked through Long Dock Park in Beacon, N.Y., one day in mid-September, a woman recognized the Scenic Hudson logo emblazoned on his vest, and she approached with excitement. A longtime resident of the area and frequent park-goer, she praised Scenic Hudson for its commitment to the preservation of open space in the Hudson Valley and, more specifically, the $16 million transformation of Long Dock Park that wrapped up earlier this year. Her friends, seated nearby on a quiet dock along the riverfront, echoed her admiration.

Camporese, a 36-year-old CPA who has worked as Scenic Hudson’s chief finance and operations officer since late 2015, said that this interaction exemplified his pride in being part of the environmentally focused not-for-profit. “Growing up in the Hudson Valley, I was always a fan of going on hikes and picnics with family, and that’s continued, as I have my own family that I’m also raising in the Hudson Valley,” said Camporese. His upbringing made the prospect of working at Scenic Hudson that much more appealing, and he thinks he was “wired” to be an accountant from the beginning.

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Getting started
Camporese graduated with an accounting degree from the State University of New York at New Paltz in 2005, and he gained experience in the auditing departments at EisnerAmper LLP, where he dealt mainly with not-for-profits, and PKF O’Connor Davies, LLP. “During the planning meeting phase of the audit, I always found myself particularly excited to learn about the specific missions of the various non-profits that I was about to go and audit,” Camporese said.

By the time he earned his CPA license in 2012, he was working as finance director at Asphalt Green, where he had a hand in the Recess Enhancement Program, which seeks to bring recreation into New York City schools where physical education is lacking. “I was fortunate enough to be in the nonprofit group of an accounting firm where I had exposure to many nonprofits, and Asphalt Green happened to have an opportunity, and I was excited to take advantage of that,” Camporese said.

“One of the things I was most excited about was my ability to play a role in connecting children to sports,” he said. Now, at Scenic Hudson, he can help connect children with nature at places like Long Dock Park, which was a contaminated brownfield site when Scenic

Even Mother Nature needs a CPA

By ZACH SIMEONE

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“During the planning meeting phase of the audit, I always found myself particularly excited to learn about the specific missions of the various non-profits that I was about to go and audit,” Camporese said. By the time he earned his CPA license in 2012, he was working as finance director at Asphalt Green, where he had a hand in the Recess Enhancement Program, which seeks to bring recreation into New York City schools where physical education is lacking. “I was fortunate enough to be in the nonprofit group of an accounting firm where I had exposure to many nonprofits, and Asphalt Green happened to have an opportunity, and I was excited to take advantage of that,” Camporese said.

“One of the things I was most excited about was my ability to play a role in connecting children to sports,” he said. Now, at Scenic Hudson, he can help connect children with nature at places like Long Dock Park, which was a contaminated brownfield site when Scenic
Hudson acquired the property in 1996. (The Environmental Protection Agency defines “brownfield” as “property, the expansion, redevelopment or reuse of which may be complicated by the presence or potential presence of a hazardous substance, pollutant, or contaminant.”) Its condition helped Scenic Hudson secure public and private funding for the cleanup and transformation, which was in progress when Camporese joined the organization in 2015. In his financial and operational roles, he was responsible for reviewing contracts, approving budgets, monitoring spending and making site visits. But “no two projects are ever the same,” he said.

Value of being a CPA
While a CPA license is not technically required to hold a CFO position, Camporese thinks that it’s been invaluable in fulfilling his roles at Scenic Hudson. “The most important thing about working for a nonprofit is wanting to become involved in not-for-profit work, Camporese said, “Make sure you get to know the ins and outs of the rules that govern nonprofits in your state of focus, and find a nonprofit whose mission speaks to something that you’re passionate about.”

Long Dock Park, managed by Scenic Hudson, is located at 23 Long Dock Road in Beacon, N.Y. From the Newburgh-Beacon Bridge, go 1.8 miles south on Route 9D, take a right on Beeckman St., a right on Red Flynn Drive, and then an immediate left on Long Dock Road.

Making an impact
Along with its expansive riverfront view of the Hudson River, the 19-acre park offers kayak rentals when the weather is warm; pavilions for gatherings along the water; community events at the historic River Center, which was converted from an old barn and has been recognized as meeting the LEED Gold Standard for environmental efficiency; and a hiking trail that goes down to Cold Spring, N.Y., and will continue to be expanded, he said.

“Scenic Hudson held its 2019 gala right on this site, where we had about 400 attendees, and it was sort of the ribbon cutting, if you will, of a new amenity for the public here in Beacon,” Camporese said. “The most significant impact I feel that my role has in everything that Scenic Hudson does is the management of our endowment,” Camporese added, referring to the Lila Acheson and DeWitt Wallace Hudson Valley Land Preservation Endowment, “which serves as one of the primary sources of funds that allows us to buy land and create and maintain our parks.”

The most significant impact I feel that my role has in everything that Scenic Hudson does is the management of our endowment.”

When asked for his advice to new or aspiring CPAs who may have a very thorough understanding of the regulations that we have to adhere to. GAAP (generally accepted accounting principles) itself is different for nonprofits than it is for, say, a governmental or for-profit entity,” he said. “Being a CPA kept me attuned to the changing regulations around nonprofits … in New York and also on the federal form, on the 990.”

When asked for his advice to new or aspiring CPAs who may want to become involved in not-for-profit work, Camporese said, “Make sure you get to know the ins and outs of the rules that govern nonprofits in your state of focus, and find a nonprofit whose mission speaks to something that you’re passionate about.”

Left: Jason Camporese in front of Scenic Hudson’s River Center at Long Dock Park, which offers arts and environmental education. Below: The Hudson River at Long Dock Park.

Above: Camporese indicating the pavilion in Long Dock Park, where Scenic Hudson held its 2019 gala.
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