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Not everyone can get paid to do something they love, and while more accountants may be so fortunate than those in other professions, few are as lucky as Jason Smith, a CPA in Elberton, Georgia. Being a partner in a 52 year-old accounting practice gives him the opportunity to focus his professional endeavors on something he would likely do as a hobby even if he weren't able to bill for it: offering financial advisory services for his clients.

In addition to the Elberton office, his firm, Smith Burch & Company, LLP (www.smithburch.com), has an office in nearby Hartwell, nestled between the foothills of the North Georgia Mountains and the South Carolina border. Living in such a tranquil setting also has its perks for Jason, whose favorite hobbies include fly fishing, motorcycle riding, camping trips to nearby lakes with the family and golf. "We have some of the most beautiful lakes in the country, with great fishing and a tight-knit family oriented community," he said.

But this idyllic setting also has the advantages of being only a short drive from larger cities for shopping and cultural activities, with the college town of Athens only 30 miles to the west and Atlanta 90 miles away. While certainly not a suburb of these cities, this proximity has driven development of Elberton and Jason's accounting and financial services practice, with an increasing number of residents making those daily commutes.

"This is also a great retirement area because it offers a peaceful setting with lakes and a small town feel," Jason said. "So many people are building their dream homes here while finishing their careers in Atlanta."

As a mortgage loan officer, his wife Leann has certainly benefited from this

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Jason initially intended to get a degree in political science and perhaps continue to law school, but, while working his way through Georgia Southern University, he had a minor epiphany: "I enjoyed political science, but I realized that if I didn't go to law school that employment options for a poly-sci major were pretty limited. So I changed to accounting, passed the CPA exam and joined my father's practice."

The firm's advisory services really took off after Jason joined Smith Burch & Company and obtained his Series 7 and 66 licenses, which allow him to advise and trade in securities. While growing the individual and business planning, investment and wealth management offerings through a separate entity called Compass Financial Advisors, he also oversees the accounting firm's internal and external audit functions, which specialize in serving financial institutions. Jason also holds a Certified Valuation Analyst (CVA) credential, which aids in small business transfers, estate and gift taxes, and litigation support.

Smith Burch & Company has grown to be one of the larger firms in the local area, with a staff of 15 that draws large business clients from Atlanta and neighboring states. Other services include nonprofit auditing, business valuations, estate and gift tax planning, business consulting, general write-up, and a broad array of compliance services. They are also embracing the growing travel and tourism industry around Lake Hartwell.

The business utilizes several accounting-specific technologies, including a suite-based tax, accounting and engagement management system. Jason partners with 1st Global Capital Corporation (www.1stglobal.com) for wealth management services and uses MorningStar Workstation Advisor (www.morningstar.com) for investment services. The firm also offers SMB accounting software assistance

to its clients and is progressing toward a paperless environment, which resulted

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sales and payroll tax compliance issues. Since Elberton is the Granite Capital of the World, it is not surprising that many clients are in that industry. And with delivery services acting as a mobile nexus by most state definitions, one client that has grown to have sales in nine states in less than a year is a prime example of multi-state compliance issues.

“They have a pyramid of tax reporting requirements in many states and local areas, and, unfortunately, many of the counties are still behind in technology,” he said. “Getting paper-based forms in some of these areas can be a real headache. I’m definitely all for the Streamlined Sales Tax Initiative.”

But enough about business. The small town setting and his partner role in the practice lets Jason get away and spend time with his family. His family recently joined some long-time friends for an extended vacation on Harbor Island on the Carolina coast, spending his time on the beach with Leann and kids Taylor Amanda (6) and Nicolas (2). He also got in a little crabbing and surf fishing (no golf, though). A lack of Internet access was not appreciated by his wife, but Jason was able to keep up with his e-mail and client portfolios using the wireless capabilities of his Dell Axim (www.Dell.com). It may not have been total isolation, but “any day at the beach is better than one at work.”

On weekends and shorter breaks from the office, Jason and his family enjoy spending time camping at the lake. They sold their boat last year, but they’re still able to get plenty of quality time on the water, thanks to a friend with a boat, an arrangement Jason says is better. “Almost everybody out here spends weekends on the lake, so it’s easy to find somebody else with a boat, which means I don’t have the headaches of maintenance and storage.”

As a good southern boy, Jason also loves college football and pro football, so he supports his alma mater, has season tickets to Atlanta Falcons games and

also makes it to a few University of Georgia games in Athens. He's also

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“To each his own,” says Jason. “Everyone is different, but finding what makes you happy and taking the leap of faith to achieve it, that’s what’s important.” It seems like he made a very good leap.

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