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One of Tony Ganze's little pleasures in life is watching hot air balloons as they drift through the Napa Valley. Of course, he also loves the ocean and snow skiing, which is partly why he moved to California from the Midwest a couple of decades ago. Originally from Illinois and a graduate of Northern Illinois University, Tony had worked briefly at a regional firm near Chicago before feeling the call of the West — the mountains and the ocean, the opportunity to start fresh.

After riding out several acquisitions and mergers while with a Napa accounting firm he had joined in the 1980s (and that eventually was being phased out by KPMG), the CPA finally bought out the practice and renamed it Ganze & Company (www.napacpa.com).

The practice offers general accounting, assurance and tax services, with specialties in advisory services to real estate and construction entities. Tony also provides educational seminars to real estate brokers.

Over the years, and with the help of partners Karen Stuart, Bill Suh and Jeremy Witt, the practice has grown from four people to a full-time staff of 18 plus interns from nearby Pacific Union College, and a very broad client base that includes closely held entities with revenues ranging from \$1 to \$100M. The practice has traditionally been an early adopter of accounting and workflow technologies, including going completely paperless on its 1040 clients and using document management software and saving documents into PDF. "Going paperless has been less about the technology and more about retraining people and getting them into the right mindset, and that means both our staff and our clients," Tony said. For the next tax season, the firm is considering more online services,

including using GoToMeeting Assist for write-up services, as opposed to needing

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from MoffSoft (www.moffsoft.com).

He says that it's a great program that even provides a savable and printable calculator tape, and includes built-in calculators, rate conversions and depreciation functions, and costs about \$19.

Now that the firm is into its second year paperless, the workflow processes the practice has developed have resulted in a streamlined tax season where staff worked little on Saturdays and not on Sundays. Family members were also encouraged

to come to the offices for a group dinner a few times per week, which hopefully relieved some of the stress during the season. Staff members also go on a retreat to Mendocino each year after tax season.

Tony notes that staffing has been one of the most challenging aspects to managing the practice, especially as the firm is trying to grow into higher level services.

"Client growth is not our goal anymore. In fact, we probably turn away more clients than we accept," he said. "What we want to do is provide top level clients with the level of service they need. If that actually means fewer clients, that's okay, too. But the measuring stick is focused on quality."

In the past 10 years, Ganze & Co. has developed a reputation as one of the most respected accounting and tax firms in the region, and, in an era when a few misdeeds have tarnished the accounting profession, that's important to Tony.

"Our public image is an important asset, and I'd like to think that our clients and others in the business community consider us honest and respect our integrity," he said. "We don't violate tax laws and won't tell people to do things unless they are completely legal, ethical and within standard rules." Tony is also active in professional organizations, and

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Curiously, however, there are no wine bottles in his office, either for drinking or for decorative purposes. Perhaps that's a good thing. There is a tennis trophy, however, reflecting his love of the sport. He's a member at the local Silverado country club where he is good enough to beat the weekend duffers and challenge others. Tony is also an avid snow skier, and, with the Sierras just about three hours away, he has plenty of deep powder to play in at the many resorts around Lake Tahoe.

Somehow, even with his tech savvy business practices, he's one of the fortunate few who can mostly "turn off" his work when he leaves the office for the not-so-grueling four-mile commute home. That means more quality time with a happy yellow lab named Rapunzel (a.k.a. Punz) and wife Teresa, a local girl who took a chance on the non-native Californian about 17 years ago.

Tony and Teresa also take time away from Napa, vacationing in Hawaii once a year, as well as shorter breaks to the mountains, or other California vacation spots like Palm Desert or Carmel. When they don't run off for the weekend, you might find it odd for a Type A person like Tony to enjoy being out in the yard, but it makes sense for him. "Taking care of plants is something kind of mindless and relaxing, and it helps to be back in nature and take a break from everything else. Plus, it's nice to have a hand in helping create something that will be healthy and beautiful in the spring."

Advisory • Technology

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