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**FIRM MANAGEMENT**

# Accountants at Work (and Play) Post-April 15

What is at the top of your accounting firm's agenda when the sun rises on April 16? Is it all crash and burn? Do you have a pile of unanswered messages and unread articles to plow through?

**Gail Perry** • Apr. 21, 2014



What is at the top of your accounting firm's agenda when the sun rises on April 16? Is it all crash and burn? Do you have a pile of unanswered messages and unread articles to plow through?

For many accountants, there will be celebrations. Others will be participating in community events, diving right into the next busy season, planning summer CPE, or de-briefing. One firm plans to take the entire firm plus guests on a celebration trip.

Some of our readers took time out of their uber-busy day to share their post-busy-season rituals with us.

- **Kemper CPA Group** will devote some of the post-April 15 time to making plans for the various CPE courses and programs staff members will attend over the summer. They'll also determine who will participate on various audit teams, and there will be an after-tax-season celebration. Some of the offices invite family members to the parties as a way of thanking them for their patience during tax season. There will be client appreciation events as well, and one of the Kemper offices takes an annual group portrait of the team right after busy season and hangs it in the lobby.

There is a gallery of previous pictures so everyone can see who has worked at the firm over the years.

- Debi Gellenbeck, COO of **Rea & Associates** in New Philadelphia, OH, said, “I hope to have a face-to-face busy season de-brief from an operational perspective. We've done it in the past and it's a real eye-opener on the differences between offices, but also a way to share best practices.” In addition, the firm will “schedule an IT steering committee meeting to address client service applications with the intent of moving everything to the Cloud by the end of 2015.”
- Kenneth Miles, managing partner at **NSBN CPAs** in Beverly Hills, CA, told *CPA Practice Advisor* that “First and foremost, we always follow up with clients on additional needs we identified during tax season.” He added, “Every spring the partners and staff participate in a firm-wide charity event for the community, whether a 5k walk, serving dinners to the homeless, or cleaning beaches, as part of our 'TEAM NSBN Takes Action' program.” In addition, this year NSBN will be continuing to ease the transition for clients as a result of a recent merger with another firm.
- Accountants at **Freed Maxick CPAs** in Buffalo, NY will barely have time to catch their collective breath before diving into recruiting season prep, community relations (employee participation in charity runs, golf outings, and support for clients' fundraising efforts), training for the annual JP Morgan Corporate Challenge team races later this spring, and a young professionals volunteer event. In addition, the firm is following up traditional tax season with pension season, governmental season, and then it's time for another tax season. “There is very little down time anymore,” according to our sources, Shawn Frier, director, and Emily Burns Perryman, integrated media & digital strategy supervisor.
- **James Moore CPAs** in Gainesville, FL will set aside some time to assess the success of the Lean methodologies they implemented into their tax processes. And they are planning an April 15th party.
- According to Felix Lozano, partner-in-charge of audit at Texas's **Whitley Penn CPAs**, “Our CPAs and support staff work very hard during busy season to service our clients. As a reward, we will celebrate by taking a firm trip to Florida. Every other year, we take all firm employees and a guest on a trip to celebrate all of their hard work and dedication to the firm and our clients. This allows time for everyone to decompress together and build camaraderie for the next busy season.

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