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Dave McClure • Jul. 11, 2014



As of a year ago, it is legal for citizens to carry concealed weapons in all 50 states. In addition, many states issue a visitor's permit to anyone coming to their state, regardless of where they live.

It's been more than 85 years – back in the days when gangsters Dean O'Banion and Al Capone went to war over Chicago – that accountants have felt compelled to carry

firearms for personal protection. Yet the anecdotal evidence is that a rising number

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ability of employees to carry weapons into the workplace. Even in these states, it may be permissible for employees to keep their firearms locked in their cars in the company parking lot.

- **Policies with Client Facilities.** Regardless of the policies of the accounting firm, the issue becomes more complicated when visiting the offices of clients and prospects. It may present an awkward discussion, particularly if the client is new or the policies of the client may be at odds with those of the accounting firm (e.g., may the client carry a firearm to the accountant's office?).

Unlike many social issues, this discussion is not just philosophical. For some, the presence of a firearm connotes a feeling of security, while in other cases a feeling of fear. And at the heart of the question is the basic position of the firm – remain silent, or risk losing the client?

- **Advising Clients on their Policies.** As accounting firms continue to take on the roles as trusted business advisors, and as payroll software continues to expand into HR policy, accounting firms will be drawn deeper into policy issues that may affect the growth and stability of its client companies. For example, will a policy one way or the other affect the ability to attract bank loans or investors? How will it impact present or potential shareholders, or the ability to attract the best employees?

There is obviously a professional cross-over problem. Accountants will not want to tread in legal matters or HR matters per se, but most have a voice in how the issue impacts the financial health of the organization.

The best practices for an accounting firm will vary according to state and local laws, but there are few steps that would constitute a starting point:

- **Tighten up the firm's own policies as a possible model for clients.** The policy

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- firm to jointly co-author a white paper that can serve as the summary advice on this issue, and promulgate the paper both as part of new business development and as a service to clients.
- **Address the issue head-on.** This issue almost begs for an additional page in presentations and contracts that outlines the firm's policies and asks the client to specify their own policies (or wishes for policies). Make it a discussion item up front, before it becomes critical.
 - **Keep local law enforcement in the loop.** It is easy to overlook the fact that emergency first-responders might want to know if there are firearms on the premises, even if they are carried in strict compliance with the law. Involving the local police department ensures that they are informed before the case, even if they disagree with the firm's policies.
 - **Remember that all accountants may not share your personal political views.** The process of craft policy has to be in some measure inclusive or it will fail. For every accountant that believes in concealed carry, there is another who feels that weapons are best left to professionals in law enforcement.

This is not a simple issue, and will not be resolved quickly. Like other social issues, this will engender much discussion, some heated argument and time before we have good policies in place.

Just check your guns at the door, please.

Firm Management

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