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Kristy Short • Oct. 20, 2016



Like many firm owners, Karla Dennis, EA and owner of Karla Dennis and Associates, Inc., started her career in corporate America. She was a tax supervisor overseeing a team of eight employees and clocking major hours. When she decided to start a family, she knew that working 100+ hours a week wasn't going to work.

“I’m a worker. I give everything 150%, and I knew that I couldn’t give 150% to my

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For a long time, Karla played all the roles in her businesses—including answering the phone, scheduling appointments, advertising, and processing client work. She knew that if she was going to grow her business, she had to add staff.

Dennis started by hiring an assistant. “I had a one-bedroom home, so we sat in the same room and worked. In such close proximity, she listened to all my calls and learned how the business worked. I didn’t realize back then that you had to train your staff; my first assistant learned by osmosis,” she joked.

A few years later came Dennis’ second child. Busting at the seams, she knew that she could no longer work out of her home, so she began the search for office space. After signing the lease, she experienced what most entrepreneurs do — that twinge of fear.

“It was scary because I knew that I was now responsible for a monthly lease. I took a deep breath and just said to myself that there was no turning back; I was going to make this happen. I was going to be successful and build my own little empire...my way.”

Dennis proceeded to build her business via referrals and through community involvement. She joined the La Palma Chamber of Commerce, where in the first two years she became president. She also got involved in several civic events, such as the La Palma beautification project.

“This was a way to network and bring in clients, but also a way that I could give back to the community and build my reputation as a business owner that was here to serve my local community. People do business with people they trust, and I built trust through community activity,” said Dennis.

In the first year alone, Dennis brought on four more staff members and grew her business by 300%. Not too shabby!

Tapping into the personal side of business

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that focus on what's important to them. I want to get to know the person before I know anything about their numbers. I want to know what drives my clients, including their business, families, passions, and goals. All of this information helps us best serve our clients and get them to where they want to be.”

She offered an example of why getting personal pays off.

Recently, a woman contacted her for help with her mother's tax documentation. The daughter had located a folder with some tax documents and years of thank you cards and other personal communications from Dennis and her team. She asked Dennis to help consolidate all the tax documents needed to handle her mother's estate, a request that was quickly fulfilled. As a result of the personal attention given over the years to her mother, the daughter also signed on with Dennis' firm.

“Our clients feel how much we care about them...beyond just statements and reports,” Dennis stated.

Dennis went on to describe another example: “I had clients that recently came in to thank me for providing them with the FAFSA forms required for college student aid. This is a function of our tax software, so why not offer a little extra to clients? I knew these clients had kids that were going to college, so providing them with the right forms would be helpful. This is all part of getting to know clients on that personal level. It keeps our clients loyal to us, and it just feels good to help at this level.”

But this level of service doesn't come easy, it requires taking the time to record notes in each client's file. In fact, Dennis trains her staff to document personal information after each client contact, even as detailed as how they take their coffee. “We have extensive notes in our CRM, so when a client comes in we can ask how their kids are doing or if they are feeling better when we've heard they've been sick. It's so much more than being a trusted advisor, it's also about being thoughtful.”

She went on to say: “This type of personal interaction makes people feel good, and

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train someone on personality.”

Emotion plays big into Karla Dennis' business model. So much so that her mantra is well known throughout the firm: “People don't care about how much you know, until they know how much you care.”

40 states and going strong

Dennis' unique combination of tax and accounting expertise and personal touch have helped her grow her firm well beyond her home state of California. To date, Karla Dennis & Associates, Inc. services clients in 40 states across the country.

“I'm licensed to do business in all 50 states,” said Dennis. “My goal is to have clients in every state.”

As tech savvy as she is thoughtful, Dennis has built a firm that enables her and her team to serve clients across the country as easily as if they were in her home town of La Palma. “I have many clients that I've never met in person. That's the beauty of technology; we can serve anyone from anywhere. We run on a powerful web-based platform that has obliterated the boundaries of distance and time.”

While she relies on technology to expand her firm, Dennis is quick to add that you can't lose that personal feel. “As much as we are living in an era of automation, we deal with people, and people want to feel like their advisor cares about them. We'll never lose that.”

Karla Dennis & Associates, Inc. exemplifies what it means to be a “Great Practice.” The balance of experience, technology, and a caring culture have fueled the firm's success. Progressing from a small home office where she changed diapers in between client meetings to a booming enterprise supported by eight full-time staffers is proof

that Dennis' business model is a winner. Whoever said "Nice guys finish last" clearly

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