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Sarah Bradley, CPA

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- North Carolina Association of Certified Public Accountants
- American Accounting Association
- American Taxation Association

Career Highlights:

With inspiration from and through collaborative efforts with my team, volunteers, valued members, and peers, I am grateful to participate in positively impacting the profession in a variety of ways:

- Drafting, exposure, and promulgation of Statement on Standards in Personal Financial Planning Services to provide an authoritative framework for consistency and ethical responsibility in the delivery of these services by CPAs and members
- Implementing personal financial planning in graduate-level accounting programs, promoting CPA financial planning and the PFS credential across the country
- Contributing to a five-fold growth of our young adviser community in the last 5 years
- Developing practical resources to help members embrace and implement financial planning & tax advisory services
- Evolving the PFP division and forward the accounting profession and CPAs in financial planning

What are you doing to make a difference in the profession, your community, the world?

I am passionate about cultivating a kind, caring, and compassionate community, including my husband, kids, dear friends, neighbors, and work family. I enjoy engaging in servant leadership, positively impacting on the lives of others. As a

working mother of two kids, three cats, a dog, and a bird, I strive daily to be a positive

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on the both personal and professional. The first is Simon Sinek's *Start With Why* because, at a time when I needed to most, it facilitated the identification and definition of my core purpose, which provides the inspiration that drives my daily decisions. The second is Greg McKeown's *Essentialism* because it was a catalyst to build from my "why", filter out the "trivial many", and focus on the most important things. And the third is Benjamin Hoff's *The Tao of Pooh* because I am a lifelong fan of Winnie the Pooh, a character who inspires mindfulness and living in the moment.

What do you see yourself doing professionally in 10 years?

There are two quotes that have inspired me over the last 10 years of my career and will continue, I am sure, to guide me in the next 10:

- *"Not all of us can do great things. But we can do small things with great love."* – Mother Teresa. I love that I get to make a difference and forward the CPA financial planning profession every day. Even more, I enjoy both the connection with like-minded individuals who I am grateful to serve every day and the camaraderie with a team of amazing individuals with these shared values. Everything I do – no matter how small – I strive to do with great love, whether it's serving one person or the masses, each action has the potential to initiate a ripple effect and effectively create a huge positive impact.
- *"Look for the helpers. You can always find people who are helping."* – Fred Rogers. I love to help. I am always willing to lend a hand or share knowledge that will help others succeed, whether it's a member, a volunteer, or a fellow staff person. And if I cannot be the helper, then I am grateful to be part of a community that I can call upon that shares the value of selflessly helping others.

So in 10 years, I hope to be doing more of this – making a positive impact on the CPA financial planning profession and serving others.

What accounting conferences do you normally attend?

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What websites/magazines do you use to keep up on news of the accounting profession?

I subscribe to *CPA Letter Daily* and Financial Planning Digest along with the *Journal of Accountancy* because they aggregate the most timely and relevant news in a streamlined way. These key media relay what's happening in the profession and require just a few minutes for review. The information provides a purposeful start to my day or week. That's *Essentialism* in action.

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