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Trusted Advisor Role

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In a recent interview with [Avalara](#), Jennifer Kolterman, CPA, a director at [Hutchinson and Bloodgood LLP](#) in the accounting firm's San Diego, Calif., office, discussed how she and the firm maintain success in the accounting profession. Hutchinson and Bloodgood LLP has built its reputation on the trusted advice and quality service the firm has given its clients for 95 years. With a mix of services in tax planning, auditing, information technology consulting, business valuations and business advisory, the firm takes pride in delivering high-quality accounting and consulting services to maximize client wealth and business growth.

Avalara: *How has your practice handled the recent U.S. Supreme Court decision? How have you worked to structure your firm around these trends?*

Jennifer Kolterman: With the still-recent changes and upheaval in the online marketplace due to the [South Dakota v. Wayfair, Inc.](#) decision, we are working with our clients to determine whether they need to register and file for sales and use tax in additional states. Many of our clients are based in multiple countries, including Denmark and Australia, so most of their activity is from remote sales. We are determining how the new ruling, in which nexus can be created without a seller having a physical presence in the state, will apply to them. It's quite a challenge!

Avalara: *What services do you provide that help differentiate your firm from others in the*

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Avalara: *How have you incorporated technology into your firm's structure?*

JK: We use technology in every aspect of our practice to serve not only our multi-state clients, but clients around the world as well. Our office also cares about the environment and is completely paperless. We use top-notch technology and software in our practice.

Avalara: *If you are finding it more difficult to compete with firms that are more savvy marketers, how are you addressing that?*

JK: We will always rely on our reputation as trusted advisors as our main method of promoting our firm. To stay in the game, however, we also drive brand awareness and lead generation through modern marketing techniques. We use numerous social channels, including our website, email marketing, search engine optimization and social media. Our partners have speaking engagements around the world and we are expanding into producing short videos to showcase our expertise.

Avalara: *What other sales tactics are you using?*

JK: Our business is predominantly referral-based. Per our mission statement, we strive to understand and serve our clients' needs. We believe that the more good we put out into the world, the more the universe has a way of making good things happen for our business!

Networking is also very important. We are members of the California Society of CPAs

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JK: For me, success is measured by client retention and communication with them. I always strive to bring new ideas to my clients and to understand their businesses so I can effectively help them with tax planning.

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Avalara: *How does a firm best attract and manage the needs and expectations of the next-gen market?*

JK: Our firm's culture could best be described as a family-friendly environment. We are very open to providing schedules that create a balance between work and life. All employees have the option to work remotely, but most come to the office because we genuinely like spending time with each other. As far as finding new talent, LinkedIn and word of mouth has worked well for us.

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Avalara: *Has anyone had a large impact on your life or the ways in which you conduct business?*

JK: My grandmother made a big impact on my life. She shared with me the importance of being a good mentor, and I strive to exercise these ideals by being an effective mentor *and* a friend to my team. She was a determined, hardworking, optimistic woman – and like her, I work to model my life in the same way.

I am also blessed to be in a strong marriage with two wonderful children, so when I'm not at work being a SALT director ... I am spending time learning from them.

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Avalara: Thanks Jennifer!

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