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**Gail Perry** • Apr. 16, 2019



I'm still catching my breath from this year's **Thought Leader Symposium**. The retreat/think tank was given a name and a purpose almost a dozen years ago by a handful of members of and consultants to the accounting profession who were getting together anyway to share ideas, discuss trends, try to figure out where the

profession is going, and consider their role in the accounting profession as a whole.

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not publicized, you'll see the ripple effect of everything we discussed as you read, listen, and learn from everyone who was present. To begin with, check out Randy Johnston's column this month, "Do Your Best Vision Management."

Meanwhile, I'm writing this while still in the throes of what seems to be my most difficult tax season ever. It's not that the changes in the tax laws are all that complicated, although there are definitely some new challenges – it's how the new tax act is impacting clients. Reactions range from absolute glee to I-need-to-take-out-a-loan-to-pay-my-taxes, and everything in between. I'm trying to look at this as an opportunity to help my clients by offering introductory financial planning services, hoping to whet their appetites to work together throughout the year, not only to avoid the annual tax return surprise, but to encourage them to be more forward thinking. You'll be hearing more about this quest in the months ahead.

Another side effect of tax time is the increase in phishing attempts. One of my clients took the bait this year and I've been trying to help soften the blow by connecting him with credit and tax agencies and giving him pointers on what to look for in the way of identity theft. It so saddens me that we live in a time where there are so many people trying to take advantage of their fellow human beings. How do you grow up to be that person? What would your parents think if they knew they had raised you to be so mean?

Anyway, the good news is that by the time you are reading this, April 15 will be in our rear view mirrors, so here's a toast to those of you who endured yet another busy season – well done and on to the next!

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