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CPACA Holds Annual Meeting, Adds New Member and Makes Plans to Help CPA Firms be Future Ready

San Diego, CA February 2019 - The CPA Consultants' Alliance (CPACA), a working group of thought leaders united in their efforts to further leadership within the CPA profession, met recently to discuss the key issues facing the public accounting profession. The group identified the key factors firms need to address to become future-ready and attract and retain NextGen talent and clients.



The Five Fundamental Areas of Focus

“As we explored what firms need to focus on to be future ready, we boiled it down to five key areas: leadership, talent, technology, client experience, and growth,” asserts Roman Kepczyk, CPA.CITP, CGMA, Director of Firm Technology Strategy for Right Networks and current president of the CPACA. “We believe there are specific, actionable steps that firm leaders can take to progress in each of these fundamental areas,” says Kepczyk.

Over the coming year, CPACA will release a series of podcasts on each of these five focus areas to help firm leaders identify the actions they can take to secure their future as a NextGen firm.

New Member Added

The group is happy to announce the addition of a new member, Matt Solomon, Chief Executive Officer at The Center for Enlightened Business. As a thought leader and human performance expert, Matt leads his organization in developing programs designed to empower firm owners to become masterful advisors. The Center for Enlightened Business participants graduate from their programs with the masterful ability to sell, price and deliver highly profitable work that contributes to their clients' lives and businesses.

“We are so excited to have Matt join us,” asserts Angie Grissom, President of Rainmaker Companies and current Membership Chair for CPACA. “His passion, unwavering commitment to helping clients, and collaborative spirit are a great fit for the group and will help the CPACA

achieve our goal of supporting and improving the leadership and future of the accounting profession.”

“I’m honored and humbled to be part of such a heart-centered and powerful alliance of thought leaders who are willing to put their egos and personal agendas aside to find better ways to serve our shared community of accountants,” says Solomon. “Every now and again, the best and the brightest minds in any given profession come together and collaborate to make today better and tomorrow brighter. I wholeheartedly believe the CPACA is that group for accountants everywhere.”

Changing Leadership

During their recent meeting, CPACA members also approved the following slate of officers to guide their thought leadership:

- **Roman Kepczyk**, Director of Firm Technology Strategy, Right Networks – *President*
- **Jeff Phillips**, CEO, Accountingfly and GoingConcern – *Vice President/Meeting Chair*
- **Terry Putney**, President, Transition Advisors – *Secretary/Treasurer*
- **Angie Grissom**, President, The Rainmaker Companies – *Membership Chair*
- **Adelaide Ness**, Executive Vice President, The Rainmaker Companies – *Deliverables Chair*
- **Tamera Loerzel**, Partner, ConvergenceCoaching, LLC – *Marketing Chair*
- **Carrie Steffen**, President, The Whetstone Group – *Immediate Past President*

About The CPA Consultants’ Alliance

The CPACA was formed in 2012 with the purpose of exploring leadership issues facing the public accounting profession and developing and sharing solutions that benefit practitioners, such as their most recent white paper [How to Beat the Robots: The Accounting Industry’s Big Shift from Compliance to Consulting](#). Other insights from the group include a book, [Bridging the Gap: Strengthening the Connection between Current and Emerging Leaders in the CPA Profession](#) and other whitepapers, such as [What Drives Happiness at CPA Firms](#) and [CPA Firm Leadership: Communication Drives New Possibilities](#). The group’s vision is to inspire positive change in the CPA profession by collaboratively establishing tools and content that will educate, motivate and increase the wisdom of current and future leaders.

The CPACA’s [members](#) are successful consultants within the CPA profession. Members’ expertise includes: CPA firm strategic and succession planning, leadership development, practice management, growth, sales and marketing, information technology, human resources, coaching, mergers and acquisitions, diversity and inclusion, and more.

For more information about The CPACA, its members and to stay connected, please:

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