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CPACA Holds Annual Meeting and Makes Plans to Help CPA Firms be Future Ready

Scottsdale, AZ February 2020 - The CPA Consultants' Alliance (CPACA), a working group of thought leaders united to further leadership within the CPA profession, met recently to discuss the key issues facing the public accounting profession. The group identified key factors firms need to become sustainable, future-ready and attract and retain NextGen talent and clients.

The Five Fundamental Areas of Focus

“We discussed that our five areas of focus from last year – firm leadership/management, learning and development, technology, talent, and growth – are still critical issues to address,” said Jeff Phillips, CEO of Accountingfly and current president of the CPACA.



“We framed our discussion around 2020 beginning a new decade of opportunity where firms must address change in all five areas. To provide actionable ideas for firms, the CPACA created a list of specific recommendations to transform the CPA firm business model,” asserts Phillips. Those recommendations can be found [here](#).

This April, CPACA will release 16 podcasts in the five areas to help firm leaders identify actions they can take to secure their future as a NextGen firm. CPACA will develop and release additional podcasts throughout the year to continually offer the profession guidance to evolve the CPA firm model to remain relevant and future ready.

Changing Leadership

During their recent meeting, CPACA members also elected the following slate of officers to guide their thought leadership this coming year:

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