

THE SMARTER ACCOUNTANT

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How to Eliminate Stress and Overwhelm,
Create More Time, Gain a Competitive Advantage,
and More!

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Chapter One: Introduction

The Boxes Most Accountants Check

This book is about what you never learned in school, in any CPA exam prep course, in any accounting CPE seminar, or in any business building workshop.

This book is about your accountant brain - the most important asset you have and how you're underutilizing it.

Let's face it, you're already smart, or you wouldn't be an accountant. You probably have a pretty high IQ, and when you're not in a CPE seminar with other accountants, you're probably one of the smartest people in the room.

But here's the hard truth - you aren't using your brain to the best of its ability.

How would you know? Check to see if any of these apply:

- You feel stressed and overwhelmed, especially during deadlines.
- You work too many hours.
- Your life is unbalanced, and you wish you had better time management.
- You're not as productive as you'd like to be.
- You compare yourself to others.
- You have difficulty with criticism.
- You're not making the money you want to make.
- You have difficulty with some of your relationships.
- Your work is affecting your health.
- You struggle with self-confidence, self-doubt, and imposter syndrome.
- You have difficulty setting boundaries and detaching from work.
- You wish you could feel happier/better.

Whether you've been an accountant for many years, or just starting out, I promise you that you're underutilizing your brain if you checked any of the above boxes.

How do I know? Because once I discovered what I'm going to share with you, everything changed for me, both professionally and personally.

Why should you become a Smarter Accountant? Because everything you want is on the other side. You need to learn how you are underutilizing your accountant's brain and what to do about it.

My Story

For most of my public accounting career, I checked all those boxes at various times. But a few years ago, I discovered the formula that changed everything.

I was able to eliminate stress (yes, even during tax season!), I was able to reduce overwhelm (yes, even with all the changes that COVID-19 brought to our personal lives and our work as accountants), and one by one, I began unchecking those boxes that seem to typically affect accountants.

The funny thing is that I had initially been applying the formula to other areas of my life, believing, like most of you, that stress and overwhelm were just par for the course for accountants. I believed that it was part of what accountants needed to deal with; in a strange way, it was necessary to get our work done.

But once I saw how the formula had improved every other area of my life, I decided to apply it to the most stressful thing in a public accountant's career - tax season. I figured, if the formula worked, then why not test it on the biggest hurdle there was. And it worked!

Why I Wrote This Book

I was recently interviewed for a podcast and was asked when I knew I wanted to be an accountant. I immediately remembered the bookkeeping class I took in 10th grade in 1982. I did very well and was encouraged to study accounting in college.

Unlike some of my high school bookkeeping classmates, I just loved how there was always an answer in accounting. I loved the problem-solving aspect of accounting, where you just needed to figure out the best way to get the answer.

Once I graduated Magna Cum Laude from the private college I attended, I was offered positions with 6 out of the Big 8 firms (yes, there were 8 back then). I chose to work at Deloitte (Deloitte Haskins & Sells at the time) in the Tax Department because during the office tour, a classmate from my college, who was a year ahead of me, pulled me aside and said, "Go into Tax. Don't choose Audit!"

During my 30+ year career in public accounting, I worked 10 years for Deloitte in the Tax Department, worked a year or so for Ernst & Young in the Tax Department, took 2 years off after my second child was born, and have worked in a small firm for over 20 years.

So, if you do the math, that means I've had decades of tax seasons under my belt. But honestly, I spent most of them as miserable and stressed as you can imagine.

Like you, I gradually began checking all those boxes on the previous page throughout my accounting career. Everyone in my family knew to "leave Dawn alone" at those stressful times of the year. All of my coworkers, bosses, and fellow CPE attendees agreed that tax season is stressful, accounting is a challenging career, and (fill in your own blank with what makes accounting difficult).

Like most accountants, I blamed things like the profession, the IRS, the clients, and even the dates on the calendar, for things like how I was feeling (unhappy), what I could and couldn't do (accountants don't get to go skiing), and the results I seemed to be stuck with (not enough time with my kids).

Thankfully, all that changed when I discovered and implemented the formula I will share with you. The best part is that I'm not a special unicorn; I can and will teach it to you so you can start unchecking those boxes as I did.

Once I learned and applied the formula, I knew I needed to share it with other accountants, especially accountant moms. Therefore, the next step in my journey was to take my earlier life coaching certification (something I decided to study for 3 years in my "free time", while also working as a CPA and raising my two children) and figure out how to help as many accountant moms as I could.

The best way I knew how was to start a coaching business, The CPA Moms' Coach, and start The CPA Moms' Podcast. I didn't want to keep this important information to myself, so I started marketing and trying to reach as many accountant moms as possible.

The funny thing is that I had no idea that the company, CPA MOMS®, already existed to help match talented accountant moms with entrepreneurs that needed their services. Once the founder and CEO of CPA MOMS, Mayumi Young, CPA, reached out to me, we discovered our shared vision, and I became their Community Manager (in addition to my continued Accounting career).

I am proud to say that, as of the writing of this book, The CPA MOMS Podcast has over 200 episodes and counting, with over 100,000 downloads. My message and motivation have always been clear - accountants need to know the formula for how to be a Smarter Accountant and how to stop underutilizing their accountant's brains.

Although I had been marketing solely to accountant moms, coaching a few accountant dads along the way, it became clear that ALL accountants needed to know how to be a Smarter Accountants, not just accountant moms. I could see that the accounting profession at large was on the verge of a nervous breakdown, especially post-pandemic, and I knew I could definitely help.

To borrow a sentiment from Oprah, here's what I know for sure - the world needs Smarter Accountants; not burned out, stressed out, frustrated accountants that dread going to work, who are overwhelmed by everything happening both professionally and personally, and who are considering walking away from the profession. Your company, clients, and family need you to learn the skill I'm about to teach you.

Now more than ever, we all need to have a clear-cut way to not succumb to burnout, to be able to handle the never-ending changes that come with our profession and to be the best accountants we can be. Accountants need support, and I know what will make all the difference - learning how to be a Smarter Accountant.

Why You Should Read This Book

Once you understand the step-by-step formula that I'll be teaching you in this book and you've practiced and applied it, you can expect to uncheck those previous boxes and start checking these instead:

- Feel less stressed and overwhelmed, especially during deadlines.
- Not work so many hours because you'll get more done in less time.
- Have a more balanced life (whatever balance means to you).
- Be more productive and efficient,
- Stop comparing yourself to others.
- Be able to handle criticism.
- Make more money.
- Improve your relationships.
- Improve your health by reducing stress and overwhelm.
- Feel more confident.
- Be able to set better boundaries and detach from work when you're not at work.
- Feel happier/better.

If you want a competitive advantage, this book will show you how (more on that later). To stand out from the crowd, you need to begin addressing the things that have been getting in the way. This book will show you the way.

How This Book Is Organized

Part I will teach you the step-by-step formula and show you the power of being a Smarter Accountant. I will walk you through how I, and my coaching clients, have used the formula to become Smarter Accountants.

Part II will teach how to specifically apply the formula to each box you initially checked in the Introduction. The best part is, if you checked a box (or boxes), you'll be able to learn the formula in Part I and then go to the section in Part II that specifically shows you how to apply it to that issue.

How To Use This Book

Before we dive in, you first need to know that the only way to become a Smarter Accountant is to do the work. If there's one thing I see repeatedly, it's accountants arguing for their limitations.

This means you believe that things like stress and overwhelm are just par for the course for accountants, and you tend to argue that that's just the way it is for accountants. I'm here to tell you that that is a lie.

When you become a Smarter Accountant, you'll see through the lies you've been telling yourself about what is "normal" for accountants. You'll be able to have the career and the life you want.

Once you learn what I'm going to teach you, you'll gradually be able to see how much control you have over things in your work and personal life and how to achieve any goals you've set.

Time and time again, my coaching clients tell me, "You do know that this is life-changing, right?". To which I answer time and time again, "I know! That's why more accountants need to know this".

Once you understand the formula, you'll be able to apply it to any of those checked boxes and honestly, to any situation you're faced with in your professional and personal life.

If you're the kind of person who likes to learn by example and want to see the formula for being a Smarter Accountant in action first, feel free to read Part II, then come back through Part I to understand how to become a Smarter Accountant.

I promise you that by the time you finish this book, learning the formula in Part I and then seeing it applied in Part II, you will discover what's been getting in your way. You'll be able to have the accounting career, and the life for that matter, that you truly want and deserve.

My Hope For You

As I said before, this formula has changed every area of my life, and I know it can change yours too. I hope that in learning how to be a Smarter Accountant, you will not just tolerate your

career, but thrive in your career. I hope that you become the person others say, “Wow, you’ve changed (for the better). What’s the secret?”.

I hope that by reading this book, you’ll see how you are underutilizing your brain, how there’s so much more you are in control of than you realize, and that understanding how to be a Smarter Accountant will change how you work and live.

I also hope you become an example of what’s possible for other accountants who have the same struggles you had; that learning how to be a Smarter Accountant, it opens the door to more options than you previously had. No matter where you are in your accounting career when you learn to become a Smarter Accountant, you also expand your options as well.

The best part about this book is that once you understand and apply the formula, you’ll see it affecting every other area of your life, not just your accounting career. Once you understand how to be a Smarter Accountant, you’ll also be a smarter woman, man, mother, father, friend, sister, brother, etc.

I promise you that once you understand how you have been underutilizing your accountant's brain, and how to start utilizing it in a smarter way, everything will change for the better. You’ll be so happy that you chose to read this book and apply what you’ll learn.

I hope you enjoyed this free chapter. As a CPA in public accounting for over 30 years, I know the challenges that most accountants face, but I also know there is a better way - The Smarter Accountant way.

If you’re interested in taking The Smarter Accountant Quiz, purchasing The Smarter Accountant book, or finding out more about me and how you can work with me, please go to <https://thesmarteraccountant.com/>

***See you soon!
Dawn***