

Client Interaction Charges This Accountant's Batteries

By Cam Sivesind

Though it was a simple lesson on balance sheets in a college business class that attracted Nina Martin to the accounting profession, it's the personal interaction with clients that most excites her as a partner with Pittman & Brooks PC, a mid-size firm located in outer southwest Portland.

"I enjoy working with clients and making a difference," said Martin, who was named a partner at the 24-year-old firm in January 2007. The company's slogan fits: "More than accountants. Business partners."

Martin was majoring in psychology at Western Oregon University before that business class hooked her and changed her career path for good. She knew someone who was a partner at a CPA firm, so she visited and asked questions about what the job was like, and she liked what she heard.

"The psychology side of my background has come in to play a lot," Martin said. "Our clients are dealing with marriages, deaths, divorces. This job can be so much more than sitting in the office all day and looking at paperwork."

"Accounting is 'this' broad," she added, holding her arms up and hands wide apart. "With the economy, I dealt with my first bankruptcy. I had a longtime client get a divorce, so there was dividing of assets. A lot of communication is needed. Working in a mid-size firm, you work on almost any type of project there could be for a client."

Martin grew up in the small, rural

town of Mt. Angel, Oregon. There are no accountants in her family background, and she admits that being an accountant was the last thing she thought she would ever become. "Little did I know," she says.

After three years working at a Corvallis CPA firm, Martin joined Pittman & Brooks 14 years ago as the office manager. The firm was in transition, and Martin worked directly with Randa (Pittman) Brooks as an accounting assistant. She credits Randa and Randy Brooks, the firm's founders who have since married, as being huge mentors.

"At our size firm, there is no sit down formal training classes for new hires. It is one on one on the job training," said Martin, adding that the firm did not even have a procedure for making her a partner a couple of years ago. "I learned more from Randa, with files in front of me and listening to her on the phone."

The client and staff interaction is Martin's favorite part of her job, and it takes up about 80 percent of her day. "I love the personal side, managing staff, getting projects done," she said. Again, she would never have guessed she'd be in such a position. "I was a pretty quiet person growing up," she added. "I didn't think picking up the phone and calling clients was something I would ever enjoy doing. I never thought I'd be going out and getting clients."

Truthfully, Pittman & Brooks doesn't "go out and get clients." Most new clients come from word of mouth, with existing



clients putting in a good word for the CPA firm. Martin talks with potential new clients, assesses their needs, and opens the line of communication. Typically, they come on board.

If you think Pittman & Brooks' clients are happy, then staffers are exuberant. And it's why the firm has been named one of *Oregon Business Magazine's* Best 100 Companies to Work For (small business category) the past five years. Martin, a mother of three who is so thankful the ►



Martin with her 5-year-old twins, Hayden and Haylie

firm provides on-site daycare, couldn't agree more. But it hasn't always been that way.

"When I first started here, family-friendly and work-life balance were not terms often heard of in the accounting profession," she said. "Our original partners got married and had kids. Now we have an on-site daycare. Although, it does not run in the black, it has allowed a lot of moms to keep working."

Personally, Martin is ecstatic to be just a flight of stairs away from her 5-year-old twins, Haylie and Hayden. "I get to see my kids. I get to have lunch with them every day," she said thankfully. "I have never been in a position where I had to drop my kids off and not see them."

Martin's "very supportive" husband, Jim, an engineer, and 7-year-old, Chase, are thankful for the family friendly atmosphere at the firm, too. Chase, who now is at school, still comes to Pittman & Brooks' daycare after school.

"(The kids) think it's great because mom is here," Martin said. "Tax season seems hard to a lot of families, but that's all (my kids) know. We start the count-

down to Sunriver (as the end of tax season nears)."

Even the typical work week—off-season and busy season—is pretty atypical at the firm. In the summer, staff have the choice to work four 10-hour days if they wish and take a day off. About the third week of January, the 50-hour weeks begin, and by the end of February, 60-hour weeks are in full swing. And for the last tax-season push, 70- and 80-hour weeks are the norm. But, true to form, Pittman & Brooks extends its daycare hours and even feeds the kids dinner and puts them in their pajamas, so all Martin has to do is put her little ones to bed when she finally makes it home.

But when tax season is complete, that family trip to Sunriver in central Oregon, is always on the docket. "I spend my off time with my family and break away to Sunriver any chance we get," she said.

Randa Brooks says Martin simply puts the client first in all she does, and Brooks credits Martin for a lot of the staff-friendly innovations at the firm. "The key attribute we saw in Nina was her commitment to the clients and her loyalty to the firm," Randa Brooks said. "She is always concerned about doing her best and genuinely concerned about her clients—on a business level and also on a personal level. That passion is also what drives her to work so hard to make sure the firm is a great place to work."

"It is usually Nina who is the one to come up with the ideas like everyone needs massages this week, or giving awards after tax season or pick-me-up ideas for the staff, etc.," she continued. "In fact, the theme for our 22nd annual firm retreat this year "It's All About You" was Nina's idea where all employees will spend a couple of days at a spa, and we will have presentations on work-life balance, exercise and nutrition, wellness, etc."

Martin now gives back to the profession, namely through being an active member of the Oregon Society of CPAs' Career Development Team. "I believe this is a great profession. I have been involved with the Career Development Team and Coaching Program because I like to help students see how much an accounting career really has to offer," said Martin, adding some words of wisdom for those considering certification. "My advice is always to take a review course and get the exam done. You can go so many directions with the CPA initials after your name, so go for it, because life has a funny way of taking over." ❖



The Financial Advisor Who Makes CPAs Look Good

Cascade Wealth Management is an independent, fee-only financial advisory firm. Offering financial plans and investment management with only the client's goals in mind.

Contact Terry Donahe today for a no-obligation consultation to find out if he is right for you or your clients.



Cascade Wealth Management, LLC
4248 Galewood St, Lake Oswego, OR 97035
503.675.4381
www.cascadewealth.com