

WINTER 2015

# SPECTRUM

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NATIONAL ASSOCIATION OF  
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# MESSAGE FROM THE CHAIRMAN AND PRESIDENT & CEO

Dear NABA Members and Colleagues:

As you read this issue of Spectrum, you'll learn that some pretty accomplished people value their membership in NABA.

Kimberly Ellison-Taylor, who was recently installed as the first black vice chair of the AICPA, believes that NABA has been incredibly important in her career. "I've met individuals who are so amazing, you can't help but grow. Membership helps you enhance your persuasiveness, your public speaking skills, and more. When you're in a volunteer organization, you understand that you have to be inspirational and aspirational at the same time. You have to ensure that your soft skills are honed to the point of sharpness."

Hasan Harnett, the first black chair of the North Carolina Republican Party, says "NABA truly lives up to its motto of 'Lifting As We Climb.' It's more than family; it's a mindset. And the relations fostered over the years are worth more than gold, silver, and diamonds combined. . . ."

We are pleased that for 46 years, NABA has provided its professional and student members benefits that extend beyond the annual membership dues investment – leadership experience, training and development, networking opportunities, and the list goes on. And, we're going to do more. Within the next six months, our leadership team will be rolling out several new initiatives and programs designed to support your career in this ever-evolving profession. Through a new membership system and member-only web portal, networking for professional members will be taken to a new level. We also anticipate expanding and retooling ACAP to bring more opportunities and values to students who are the future of the accounting and finance profession and of NABA.

Finally, NABA would not be as successful as it is today without the tireless efforts of you – our members, who volunteer with great passion at the national, regional and local levels. We are grateful for your time and talent and for exemplifying our motto, "*Lifting As We Climb.*"



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# KIMBERLY ELLISON-TAYLOR

## Takes on National Role with AICPA

*By Ruth E. Thaler-Carter*

Look for increased interaction between AICPA and NABA and a continuing – if not increasing – focus on talent development and inclusion at AICPA and throughout the accounting profession. As the newly elected vice chair of the AICPA Board of Directors, Kimberly N. Ellison-Taylor, CPA, CGMA, CISA, director of global accounting strategy at Oracle’s Financial Services Industry Group will work closely with Tim L. Christen, the AICPA chairman of the Board, on ensuring the relevancy and vitality of the profession—for everyone.

Ellison-Taylor, former chair of the Board of Directors of the Maryland Association of CPAs (MACPA) and the first MACPA member to serve as AICPA vice chair, has worked as a CPA in public practice, in government, and in business and industry. Her background includes serving as Oracle’s Global Practice team leader for Health and Human Services and previously in leadership roles at the NASA Goddard Space Flight Center, Motorola, KPMG, and as chief information technology officer for Prince George’s County Government. “I’ve always been committed to the accounting profession and what it stands for, no matter where I worked,” she said.

What Ellison-Taylor loves about the profession, she said, is that “it involves a portable skillset, promotes a commitment to lifelong learning, and overall enables a competitive advantage in the workplace,” as well as providing financial stability and brand differentiation.

Ellison-Taylor’s role in AICPA, MACPA and NABA evolved from an early interest in the profession. “I grew up in inner-city Baltimore, and I knew I wanted to be a CPA since third grade,” she recalled. “In under-represented communities, it is not unusual to see the push of kids to aspire to be doctors, lawyers, etc., but when it came to accounting and after hearing about how CPAs managed the money, it was an instant connection.” In Baltimore, she attended Eastern High School and Carver Vocational Technical High School where became “a big fan” of accounting classes as an early step to such a career. Her advanced education melded

several topics that have become key to her professional success – at the University of Maryland-Baltimore County (UMBC), she majored in information systems, followed by an MBA from Loyola, an accounting certificate from the Community College of Baltimore County, and a master of science in information technology and chief information officer certificate from Carnegie Mellon University. Throughout her educational pursuits, accounting was her core passion in both career and service.

“When I passed the CPA exam, there was no hesitation – I knew what I wanted to do: put that education to work in the accounting profession,” Ellison-Taylor said. “I started to think about how I could help, which led to being active in MACPA and AICPA.” As a result, Ellison-Taylor supported MACPA’s program to attract students to the profession called Tomorrow’s CPA and served on the Technology Committee and with the New Young Professional Group before moving on to Board service with MACPA. In that role, Ellison-Taylor worked on initiatives that supported NABA and the NABA community, especially since NABA is headquartered in Maryland. She has welcomed the opportunity to be on the AICPA Business and Industry Executive Committee, Council, Board, and now vice chair. In these capacities, Ellison-Taylor has also worked on and supported NABA initiatives.

Throughout that history of service, “I’m very proud that I have been able to support all communities, across all segments of the profession,” Ellison-Taylor said. She sees AICPA and MACPA as partners with NABA and, as a member of NABA’s Maryland chapter, is determined to continue her long-time commitment to the profession. “We have a number of initiatives to enhance and strengthen the profession for generations to come. Working with Chairman Tim Christen, my goal is to work with all stakeholders, especially NABA and state societies to support the profession’s core values and mission,” including those aimed at making the profession more inclusive, she said.



NABA has “absolutely” been important to Ellison-Taylor’s rise in AICPA, and her involvement in both organizations has been valuable to her career as well. “The networking opportunities have been priceless– I’ve met many amazing leaders,” she said. “You can’t help but grow from each interaction. Membership helps you enhance your persuasiveness, your public speaking skills, and much more. When you’re in a volunteer organization, you understand that you have to be inspirational and communicate aspirations at the same time. You have to ensure that your soft skills are honed to the point of sharpness.”

At 45, Ellison-Taylor hopes that colleagues will see her age as an inspiration. “I’m working with Millennials as a proud Gen X,” she said. “I am that bridge from classic TV shows to those growing up with technology, from manual typewriters to computer keyboards.” Typical of her generation, Ellison-Taylor balances work, NABA, MACPA, and AICPA activities, being active in her sorority, Sigma Gamma Rho where she is a chapter president, performing community service, and family life with her husband and their two children.

Ellison-Taylor sees the challenge of serving as AICPA vice chair as exciting, in large part because she will be working with a chairman, Tim Christen, who cares about the same things that are important to her. “Along with Tim and our Board of Directors, I’m working with the great teams at AICPA and state societies on analyzing new and emerging trends, advocacy, education and recruiting, and improving the services we offer to our members,” she said. “Tim is also very interested in technology in general and cyber security, along with his own personal interest and leadership experiences in talent development as CEO of Baker Tilly, which are all things I’m passionate about.”

Enhancing AICPA’s focus on talent development, which has been called a critical issue for businesses and the profession, will be one of Ellison-Taylor’s priorities – an especially important one for the accounting profession as accounting students continue to review their many career options that may or may not include the traditional career paths.

Her leadership role in AICPA is beneficial to NABA, which has a permanent seat on the AICPA’s National Commission on Diversity and Inclusion, Ellison-Taylor noted. “We’ve been working together on attracting and retaining talent,” she said. “The new NABA CEO, Jina Etienne, was with AICPA most recently and is also a CPA, CGMA. Jina’s experiences and her knowledge of the resources available with AICPA will enable greater synergy between the two organizations.”

NABA and AICPA together are “necessary and needed” in Ellison-Taylor’s view: “There’s a definite synergy between them. NABA is amazing in its own right and I have enjoyed working with NABA Chair Kenneth Cooke, CPA, who has a number of great initiatives and ideas I am happy to support. But when asked, what would I advise NABA members, I encourage passing the CPA exam, finding out more about the Chartered Global Management Accountant designation, enhancing soft skills, and leveraging resources like AICPA, including taking advantage of the great networking opportunities at conferences. It can never hurt to pursue credentials, expand your network and increase your exposure to new learning opportunities,” she said.

Ellison-Taylor sees AICPA as an international and member-based organization, “here to serve an inclusive profession. We want to see everyone at the table, working together to be more effective and serve the public interest. There is a place for all of us, regardless of whether you’re a CPA or working toward becoming a CPA or have decided on a different option within the profession.”

“While progress is certainly being made, there is always a need for improvement. We have a number of initiatives that will help the accounting profession be more inclusive. NABA and AICPA together are a stronger team,” Ellison-Taylor said. “I’m looking forward to seeing what we can do to make a difference.” ▲

**“We want everyone at the table, working together to be more effective..”**





## JINA ETIENNE

### One Woman's Journey to NABA

By Maya Francis

"The stars aligned," Jina Etienne, CPA, CGMA, says of the success she's had as an accounting professional, which includes five years at a Big 4 firm and entrepreneurship. Now president and CEO of NABA, Etienne is setting out to leverage her own experiences and unique point of view to "make a difference in a different way," as she maintains oversight of the day-to-day operations of the national office and strategic organization of NABA.

An American University graduate, Etienne initially had her heart set on the law. "At 12 I told my mom I was going to be an attorney. I don't know why people make these decisions when they're children," she says with a laugh.

After some success in a "Principles of Accounting" course, Etienne was hooked. In her final semester, Etienne juggled taking five classes and working full-time in her co-op. It turned out that the highest-paying job available at the career services center was with Touche Ross, which would serve as her entry into the field of public accounting.

Nearly five years later, Etienne started her own business.

"I am my father's daughter," she says proudly, noting her father's sales career. "Don't for a minute think that you can run a small business and not also think you have to be a salesperson. You can't just be twiddling your thumbs. I didn't want to be a partner in a large firm. I didn't want to go into private business. I also knew motherhood was important to me. And I wanted to be a mother on my own terms. I was winging it."

Etienne credits much of her success to self-awareness and a commitment to upending the status quo of CPA culture. "My strengths are in operations processes and strategic growth. I was focused on service," she says. "The directive I gave to our staff was that when our client walks out the door and they press the button for the elevator, I want them to think, '[sigh] I love my accountant.'"

"We're going to deliver the financial statement on time.

What sets you apart is connection. "Clients are part of your community, so they're part of your life. You don't want them to come up to you and ask you for the report they're



**“I would like to be able to create an environment where people want to be their best because that’s what they want.”**

waiting for. They don’t come up to ask you tax questions. They see you as a whole person. The business model was for them to see us as people who happen to do their tax returns once a year. For some, client is king. The client is not my king. My client is my partner.”

For small businesses, Etienne says that it is tempting to take on any business that comes your way—a fatal flaw. “The tendency is to want to do work for whoever walks in the door, regardless of what kind of tax work they want. A lot of people get into trouble that way. . . . I suffered from that at the beginning. I took work from any client and set my fees really low. It’s a chronic problem in public accounting. We don’t ask for a full value because we’re afraid the client will walk away. It’s fear and insecurity. We always believe that everybody else has it figured out and we become less confident—a kind of imposter syndrome. Decide who you want to be, then be that person. There are clients out there who would love you as you are.”

“Also,” she adds emphatically, “We need to stop leading with we’re CPAs. You can’t live in this place [as an accountant] where you say ‘I’m a tax person, and I’m going to get your taxes done right.’ Well, yes, I would hope so. Tax is what I know. It’s not who I am. CPAs get stuck in that. CPA is a skill—you have been trained to execute that skill. I have always lived my life like that. I have never been distracted with [the CPA designation] or believed that somehow defined me.”

Her confidence and experience emboldened her success as director of taxation at AICPA. “I showed up in the room as an authority,” she says. “Obstacles are only something you see when you lose sight of your goal.”

Etienne, mother of two boys, juggles the demands of home with that of a demanding career. “The challenge has been balancing who I want to be at work with when I’m not at work. The hardest part was managing my marriage. People know what they’re signing up for when you marry a doctor. Or a pilot. But don’t always know about how it is to be with a CPA at a public accounting firm. My husband was like a single parent during tax season. That was my challenge—managing the demands of being a wife and mother with the demands of being a woman in a public accounting firm. Everything else was just a problem to be solved, but not a challenge to navigate in that way.”

Following a trip to the Newseum in Washington, D.C., and its extensive exhibit on civil rights, Etienne has found inspiration to serve others. “I walked away with this impactful feeling that, my God, I must pay homage to those who [went] before me. ‘What have I done lately?’ That became my consciousness in the beginning of this year. And then the NABA position came. When your values and your goals and your heart are aligned, things come into your life that feed that.”

“I want to be known as being firm but fair. I would like to be able to create an environment where people want to be their best because that’s what they want,” she says. “The environment that I’d like to develop at NABA? That what people want to do in their life naturally aligns with what we need them to do when they show up for work. A synergy. Emotional maturity. Self awareness. The ability to be creative and problem solve and just do the right thing. The people with the right competency know what those things are.”



From left: Jina, Dominick, Gerard, and Sebastien Etienne.

“I got lucky as hell. If it had been at any other co-op, I would not have the career I have today. And I got lucky and got a mentor on my first day. And had a black manager at Touche Ross. I got lucky. But I think that if you really want to be successful in accounting today it’s going to be helpful to seek out other people.”

Etienne cites NABA as an important resource to help Black accountants navigate and thrive in the world of accounting.

“There are more people coming into the profession, but they’re not staying. So the next challenges are inclusion or retention. So it’s great that you let me sit at the table, but it doesn’t matter if you don’t care what I have to say. Or if you look at me like ‘I wasn’t talking to you,’ when I speak. Diversity is not just about recognizing it and seeing it. It’s about making space.” ▲

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# NABA's Past Chair Honored With SCHOLARSHIP ENDOWMENT IN HER NAME

By Elaine W. Smith

Greta Russell, CPA, CGFM, two-term NABA past chair and Lifetime Member, has received numerous awards and honors during her 35-year career, but it doesn't get any better than this: Franklin University, a Columbus, Ohio-based leading educator of working adults, has established the Greta J. Russell Medical Mutual of Ohio Scholarship Fund "in honor and recognition of [her] many contributions to . . . local and national community." This fund was made possible through a gift of \$100,000 from Medical Mutual of Ohio, a health insurance company, of which Russell is a board member.

"We are grateful to Medical Mutual of Ohio and Greta Russell for helping provide the opportunity to help meet the needs of adult students who have the ambition to continue their education in combination with other responsibilities," said Dr. David Decker, Franklin University's president in announcing the scholarship earlier this year. "It is a gift like this that demonstrates how business and higher education can work together to provide a quality education to students who want to make a difference."

Russell, who has made a difference in the accounting profession, is passionate about adult education because she worked at Buckeye Federal Savings and Loan Association while pursuing her bachelor's degree. When she received her degree at the age of 30, she had risen to the rank of assistant vice president at the bank. Five years later she earned her CPA designation, and later earned a master's degree in taxation. "My education was reinforcing what I was doing on the job," Russell said. "The CPA designation allowed me to work on all sides of the bank, including retail, lending, and administration."

Russell left the savings and loan association in 1983 and became the controller of the state of Ohio and served in that capacity 12 years. In 1995 she was appointed controller of the Ohio State University, and retired from that position in 2012. Russell says that the highlight of her career was being the first person to sit on the Ohio State Board of Accountancy who did not come out of a public accounting firm.

Russell explained that the Greta J. Russell Medical Mutual of Ohio Scholarship is designed to assist undergraduate and graduate students at Franklin who are pursuing an "interactive field experience" course of study focusing on a

**"We are grateful to Medical Mutual of Ohio and Greta Russell for helping provide the opportunity to help meet the needs of adult students who have the ambition to continue their education in combination with other responsibilities."**



*Greta Russell presented the gift on behalf of Medical Mutual to Franklin University representatives, Dr. David Decker, president, and Bonnie Quist, vice president of advancement & strategic relations.*

research project to address a problem, dilemma or issue in their community or broader society. She is tied to Franklin University – where she also recently received an honorary doctorate in leadership – through years of volunteerism, which includes introducing Franklin students to NABA. "NABA is still as relevant today as it was when it was founded," Franklin says. "We still have the issue of the lack of minorities going into the accounting profession. We need to reach them and make them aware of the opportunities that exist in the profession." ▲



# LAUREN PARROTT

## From Pre-med to CPA

By Miriam W. Tarver

Very early on the path to becoming a doctor, Lauren Parrott took a detour into the world of finance.

Her mother, a registered nurse, had groomed her daughter to think "doctor." So when Parrott, 25, a Chicago native, entered college, "I was pre-med. But I realized I wasn't in love with that."

What she also realized was that when left with waiting-room reading material, she gravitated toward the Wall Street Journal and financial magazines. So, she broke the news to her mother that math was her passion, and her mother came back with a list of fitting careers. "Accountant" jumped out at her.

A cousin who is an accountant, but not certified, filled her in on what to expect and made a strong suggestion: Become a CPA.

So in her junior year, she changed her major -- no easy task with a new set of course requirements and a young son to care for -- buckled down, and earned a bachelor's in business administration in 2012. That same year, she started the master's program in business administration at Saint Xavier University, where she was also urged to reach for the CPA. She took the first part of the CPA exam during graduate school. When it came to preparing for the final part of the test, "I took the summer and studied like it was a job."

At 23, she became a certified public accountant.

Benford Brown & Associates LLC, was looking for someone interested in becoming certified. Parrott was already there.

The full-service woman- and minority-owned firm is a good fit. "What I was studying (for the CPA exam) was starting to make sense. "We work with the big firms," Parrott says. But she's not interested in moving to one, where "it's very easy to get pigeonholed." At Benford Brown, "In one day, I can

do a tax return, have to work on a fraud engagement, do a little consulting work, and then work on a financial audit. I can find out what I love."

One non-work thing that Parrott loves is giving back. At Saint Xavier, she and two college friends, with whom she also attended high school, founded a nonprofit, Adon's Kids Inc., to serve the minority community surrounding the majority-white school. "We felt there was something we could do besides getting an education." The group "hosted fund-raisers, had back-to-school drives, I spoke at high schools about teen pregnancy... we just wanted to give back, Parrott says. "We didn't have money, but we had time."

**"That's always been my dream, to start a school from the ground up. I want to do the finances and make sure that my school is financially in shape."**

Her advice to high school or college students considering accounting and finance: "Get a mentor. Create a 10-year plan and start working on it early. My best mentors were people in different fields who told me what they did wrong so I wouldn't make the same mistakes."

While attaining the CPA designation is a mark of distinction, it is part of a bigger plan for Parrott.

"I want a school," she says. "That's always been my dream, to start a school from the ground up. I want to do the finances and make sure that my school is financially in shape."

One of her next big goals is getting a Ph.D. In education. Seems she's destined to be a doctor after all. ▲



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# YOU

## 6 Tips to Creating Peerless Value at Work

*By DeEtta Jones*

Given the rapid pace of change in most organizations, it is likely that you have considered the value you add. Value is the return on investment that your company enjoys because of your contribution to clients, colleagues and work product. It also includes things like how you enhance the company brand, introduce innovative approaches or facilitate breakthrough solutions that affect the bottom line. The degree of value you bring to your company is directly correlated with your irreplaceability.



Not many people would describe themselves as irreplaceable. When a new boss comes on board, or an existing employee is promoted to a managerial position, often their first step is to actively seek out people with ideas about making things better around the office. These individuals can be called the “linchpins,” and they are the ones who have lived and will continue to live in the organization long after the incoming boss is gone. They have more skin in the game, so seeking them out will aid the manager in assessing the organization’s capacity and its ability to grow.

Here’s the other great thing about irreplaceable people—they can be incredibly influential. They might not be influential at first or all the time, but they are the people who, armed with belief in their ideas and their organization’s ability, build strategic alliances and create breakthrough experiences. They stick their necks out when others are protecting theirs, like turtles tucked safely inside their shells. The expectation is not that you go into your next meeting like a bull in a china shop, pushing an idea that’s been percolating in your head for weeks. Influence is more than just having a great idea. It’s about understanding and being able to carefully navigate the environment and relationships needed to get the idea socialized and considered viable by others.

## Tips for Making Yourself Irreplaceable:

### 1 BELIEVE YOU ARE IRREPLACEABLE.

Confidence is HUGE. If you don’t see your contributions as valuable, how will others?

### 2 BE POLITICAL.

Political savvy is one of the most difficult skills to teach, yet one of the most crucial, particularly for achieving C-Suite ambitions. Being political does not mean failing to listen or be influenced by other points of view. In fact, some of the most influential leaders are distinguished by their careful and authentic consideration of alternatives.

### 3 LOOK AROUND.

Pull your head up away from the fires and the tedious tasks, and look around. Irreplaceable people find opportunities to implement systems, not just cross off the ever-replenishing to-do list items.

### 4 CULTIVATE YOUR CREATIVITY.

Find, acknowledge, embrace and cultivate your creativity. Many of us spend much of the day using the left sides of our brains—the analytical, objective side. Find ways to tap into the right side of your brain more regularly—the intuitive, thoughtful and subjective side. Take an art class, or take a walk through an art gallery during your lunch break. Though it is common to want to take objective approaches to leading, in reality, you live in subjective organizations where being able to read subtle cues, use intuition, and thoughtfully navigate your own emotion and those of others are invaluable characteristics.

### 5 ACCESS YOUR WHOLE SELF.

We are more than just heads propped up on hunched shoulders slouching over computers. Stand up. Take a walk. Stop thinking about work—several times per day. Incorporate walking meditation into each day: let yourself be overwhelmed by the beauty of the trees changing color or feel the crisp air on your face while freeing your mind of negative thoughts. Then go back to your workplace feeling refreshed and open to new ideas for solving the problems that will still be there.

### 6 HELP OTHERS.

Be a team player willing to step up and be helpful to others without being asked or rewarded.

Helping others allows you to deepen your skill set, gather additional insight about a system that may need to be changed, and demonstrate your expertise.

One of the greatest inhibitors of people’s full potential is fear, waiting for the person in charge to give direction, even when the person in charge is paralyzed by fear. The leadership challenge is being able to get beyond fear of exposure or perceived weakness in times when others are in need of a new approach. Indispensable people are able to let go, at least temporarily, of the need for approval. Assume that coloring in the lines is for the boring and the brainwashed. Let go of the little voice in your head that so desperately wants an ‘A’. Know that you have the ability and the courage to create something—a relationship, a culture within your unit, a new product or system or offering—that others may not immediately approve of or understand, but that adds value to truly make you peerless in your organization. ▲

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DeEtta Jones is a leadership strategist, social justice advocate and author. She has more than 20 years of experience working with individual leaders and teams in some of the world’s most prominent universities and corporations. Her multidimensional background and fresh perspective leaves clients feeling heard and empowered to take on some of the major organizational and workforce challenges of our times. For more information or to have DeEtta speak at your next event, please visit <http://www.deettajones.com>.



# PROFILE

By Ruth E. Thaler-Carter



## NABA is Key to Political and Personal Success for HASAN HARNETT

You might not think of politics and accounting in the same breath, but NABA member Hasan Harnett, 39, has brought them together in his recent selection as chair of North Carolina's Republican Party. He credits his NABA experience with this career achievement and a peak in his personal life – his marriage to fellow NABA member Ayana Harnett.

"NABA has been part of my life for many years, either behind the scenes or in leadership," Harnett says. "I was always enthralled by the professionalism and diversity of talent in NABA, what the association represented: a place where we could share goals and ideals. NABA truly lives up to its motto of 'Lifting As We Climb.' It's more than family; it's a mindset. And the relations fostered over the years are

worth more than gold, silver, and diamonds combined—the friendships go back for decades."

### The personal element

Harnett and his wife are both originally from Boston, unwittingly moved to the same town when they were young, met through Bible school, and attended high school together for two years. She earned her degree in accounting and he majored in biochemistry. "I went to work in venture capitalism and found my way back to North Carolina," earning a master's and finding a job in finance. They met again through NABA.

**“NABA helped give me the confidence to stand in that doorway and walk through it.”**



*Claude Pope, Jr. (immediate past chairman 2013-2015) and his wife Melissa Pope with Hasan and Ayana Harnett.*

### **The professional process**

Both Harnetts have been active in NABA, Hasan as chapter parliamentarian and Ayana as a chapter president. “We helped the chapter achieve unprecedented growth,” he said. “We were the young professionals who bridged the gap with older members who were transitioning off the board.”

Harnett credits his NABA experience for his success in politics and expects his professional skills to benefit the party. “NABA helped give me the confidence to stand in that doorway and walk through it,” he said. “Where I am today is because of NABA. It’s all connected.”

NABA taught Harnett how to “season my conversation” and debate issues while standing up for what he believed in, he said. “I’m able to look at numbers, logic, and facts,” which he expects will be invaluable in his role as chair. “You have to inject your personality into the presidency of a company, and, when you’re in the boardroom, you have to make sure the company is solvent. It’s the same with politics. As chairman, I can look at those factors and numbers. I’m able to bring calmness and relate to the hearts and minds of our constituents.”

In view of the contentious nature of politics today and the current Republican campaign for president, Harnett wants his NABA colleagues to know that “Republicans do care,” he said. “We care about our local, state, and national communities. Republicans are pro-family and pro-business. We will allow any person at any station in life to rise up as far as he or she wants to go” – a philosophy he equates with the NABA motto.

Harnett’s first actions as chair of the party will be to open a dialogue with NABA and other organizations about diversity, meet with professionals to understand their perspectives, and give a new generation of accountants and financial professionals access to meeting presidential candidates. ▲



*Ayana Harnett; Gwendolyn Skillern, CPA, senior vice president and general auditor, CareFirst Blue Cross Blue Shield and NABA past president; and Hasan Harnett*

# NEW DUES RATE PLUS ANNIVERSARY-DATE RENEWAL = INCREASED MEMBER VALUE

It's been five years since NABA's last member dues increase. Within that time frame, the organization has experienced increased costs for operations and new program development. Within the past year, NABA has made several changes to improve the member experience and offerings and more changes are in the works. In order to continue to grow value to members, the Board of Directors and the National Office conducted a comprehensive membership dues analysis considering many factors, including member value, increased cost of services and new programs in development, and concluded that a dues increase was needed. Therefore, the NABA Board of Directors voted to increase annual dues as follows:

## STUDENT MEMBERSHIP:

From \$20 to \$35, effective July 1, 2015.

## PROFESSIONAL MEMBERSHIP:

From \$150 to \$200, effective January 1, 2016

## FACULTY (ACADEMIA) MEMBERSHIP:

From \_\_\_ to \$115, effective January 1, 2016

Also effective January 1, 2016, NABA will be discontinuing the June 30, fixed date for joining the organization and transitioning to an anniversary-date membership cycle – your join/renew date is the expiration date.

The new dues rates, coupled with the anniversary-date membership cycle will enable NABA to take member programs and services to a new level. For more information, read the FAQ on this page, visit the NABA website, or contact your local chapter leaders or the membership team at the National Office. ▲

## MEMBER DUES FAQ

### Q: Why is NABA raising dues?

A: NABA has not raised dues in more than five years despite the continued increases in general costs to maintain basic service levels. To grow the value of being a member and provide the tools and resources our members need to be successful, the association must have the necessary resources.

### Q: How were the new dues rates decided?

A: The dues rates were established after a thorough review of other, similarly seated associations and professional societies (ALPFA, ASCEND, AICPA, etc.) to help benchmark an appropriate new dues amount. Organizations similar to NABA in revenue and membership charge between \$235 and \$254.

### Q: Is everybody's dues going up?

A: For the January 1, 2016 increases, only the Professional Members and Faculty Members will be effected. The Student Members already experienced an increase in July 2015 and the Age 65+ (senior) dues are remaining the same.

### Q: How much is the increase?

A: The dues amount for Professional Members will increase from \$150 to \$200 and from \$85 to \$115 for Faculty/Academia. There is no increase for Senior Members (Age 65+).

### Q: How does the rolling membership effect the voting process?

A: Professionals still need to be a paid member by October 31 of each year in order to vote in the national/regional and local elections which occur in February.

### Q: Could the increase have been spread out over several years?

A: Incremental dues increases would have significantly delayed NABA's ability to strengthen member services, making it even more difficult to provide our chapters and members with the tools necessary to enjoy the benefits of being a member of NABA.

### Q: What do I get for my increased dues?

A: Significant technology enhancements, delivered via a new NABA website (coming in January) will greatly increase our members access to tools, content, networking, etc. NABA will also be updating and developing more resource materials for members including live webinars and on-demand learning. Members will also see greater control over communications (push vs. pull) and a real-time member experience with our new online community forum.

### Q: Will NABA start raising dues every year?

A: There are no plans for additional dues increases at this time. Dues now, and in the future, are based on value provided to the member, the cost to provide that value and are voted on by the Board of Directors.

### Q: How much of NABA's budget is from member dues?

A: In NABA's 2016 budget, 8% of overall revenue is derived from membership dues. The majority of the remaining revenue is related to the Annual National Convention and Expo, Education, Grants and Programs.



Please print legibly and complete all fields. All information will be held in strict confidence. Pertinent data will be forwarded to your NABA Chapter.

**Personal Information**

PREFIX, FIRST, MIDDLE, LAST NAME, SUFFIX \_\_\_\_\_  
 HOME ADDRESS \_\_\_\_\_  
 CITY STATE ZIP CODE \_\_\_\_\_  
 PHONE NUMBER E-MAIL ADDRESS \_\_\_\_\_  
 GENDER  MALE  FEMALE DATE OF BIRTH \_\_\_\_\_

**Company or School Information**

COMPANY OR SCHOOL NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 CITY STATE ZIP CODE \_\_\_\_\_  
 COMPANY OR SCHOOL PHONE NUMBER TITLE \_\_\_\_\_

**Job Type** (Please indicate your Job Type)

**Public Accounting, Law and Consulting**

- Partner/Shareholder/Owner  Sole Practitioner  Staff  
 Internal Audit

**Business and Industry**

- President/CEO/COO  CFO/Financial Officer  Officer (Non-Financial/Non-Accounting

**Government**

- International  Federal  State

**Education**

- Administration  Professor/Teacher

- Industry**  Corporate  Education  Government  Self-Employed  
 Nonprofit  Public Accounting  Other \_\_\_\_\_

- Salary**  \$21,000 - \$40,000  \$41,000 - \$60,000  
 \$61,000 - \$80,000  \$81,000 - \$100,000  > \$100,000

- PREFERRED MAILING ADDRESS  HOME  COMPANY/SCHOOL

**Education Information**

UNDERGRADUATE SCHOOL GRADUATION DATE \_\_\_\_\_  
 MAJOR OVERALL GRADE POINT AVERAGE \_\_\_\_\_  
 DEGREE (i.e., BA, BS) CLASSIFICATION (i.e., Freshman) \_\_\_\_\_  
 GRADUATE SCHOOL GRADUATION DATE \_\_\_\_\_  
 MAJOR OVERALL GRADE POINT AVERAGE \_\_\_\_\_  
 DEGREE (i.e., MBA, MS) \_\_\_\_\_

**CERTIFICATIONS** (i.e. CPA, CISSP)

- CPA  CFA  CFM  CISA  CISSP  CIA  CFSA  
 Other \_\_\_\_\_

**ARE YOU A MEMBER OF A STATE SOCIETY?**

- Yes  No

**IF YES, WHICH STATE SOCIETY ARE YOU A MEMBER OF?**

**ARE YOU A MILITARY VETERAN?**

- Yes  No

**PLEASE SPECIFY THE SERVICE BRANCH:**



*"Lifting As We Climb"*

**NABA, Inc.**

P.O. Box 741146  
 Atlanta, GA 30374-1146  
 Phone: (301)474-NABA  
 Fax: (301)474-3114  
<http://www.nabainc.org>  
[membership@nabainc.org](mailto:membership@nabainc.org)

**MEMBERSHIP APPLICATION**

**Application Type**  Professional  Student

**Previous Member?**  Yes  No Member ID \_\_\_\_\_

**Chapter Affiliation** \_\_\_\_\_

**Check Desired Level of Contact**

- I wish to periodically receive special offers, promotions, and research surveys from NABA and its carefully selected partners via mail and/or e-mail.  
 I do not wish to receive anything other than official NABA publications.  
 I would prefer to receive my publications via e-mail at the above e-mail address. (Because of email filtration at many companies, we recommend using your personal e-mail address rather than your business e-mail address.)

**Membership Fees**

PLEASE ENTER AMOUNTS AND TOTAL BELOW.

PLEASE CHOOSE APPLICABLE CLASS.

AMOUNT

**Professional Member**

- Regular** \$150.00 \$ \_\_\_\_\_  
 **Academia** \$85.00 \$ \_\_\_\_\_  
 **Senior (65 years or older)** \$85.00 \$ \_\_\_\_\_  
 **College Pipeline Initiative \$0.00** \$ \_\_\_\_\_  
1st year of professional membership for graduating students. Official transcripts must accompany application.

**Student Member**

- Regular** \$20.00 \$ \_\_\_\_\_

**National Annual Giving Contribution**

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**National Scholarship Contribution**

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL**

\$ \_\_\_\_\_

*Membership for (FY15) July 1, 2014 - June 30, 2015*

**Payment Options**

- Check/Money Order Enclosed. Make payable to NABA, Inc. Please include the Registrant's name on the check and return with this form. \$ \_\_\_\_\_

**Credit Card:**  VISA  MASTERCARD  AMERICAN EXPRESS

CARD NUMBER EXPIRATION DATE \_\_\_\_\_  
 NAME ON CARD CID \_\_\_\_\_

To be eligible for scholarships from NABA, Inc., you must be enrolled at a qualified college or university within the United States and be African-American or of African descent.

Please remit your annual membership dues to the above address. Do not fax and mail this form simultaneously as this will result in your being charged twice. Also note, NABA's fiscal year begins July 1 and ends June 30. Dues are accepted any time during the year, but membership will expire at the end of each fiscal year.

I verify that the information on this application is true and accurate. NABA reserves the right to verify any information I provide. As a member of NABA, I understand that I must adhere to NABA's Bylaws and National Policies and Procedures Manual (NPPM) as they are now or as they may be amended. Failure to do so may lead to discipline including termination of my membership without refund. I also understand that providing inaccurate information to NABA on this membership application or at any other time is a violation of NABA's Bylaws and NPPM and may lead to discipline including termination of my membership without refund.

SIGNATURE/DATE \_\_\_\_\_

# The Stress-Relieving Value of BEING YOUR AUTHENTIC SELF

*By Walt Grassl*

Paul and Trudy work in a medium-size company. Paul has recently had to present in meetings with both upper management and with clients. He has been getting more and more stressed out with the higher levels of scrutiny. Before each and every meeting, he tries to figure out how he needs to act. What questions might he be asked? What is the best answer? What do they want to hear?

Trudy, Paul's long-time associate in the office, has noticed his stress and invited him to lunch. After listening to Paul describe his feelings, she understood the root cause of Paul's stress. So she shared with him her thoughts on being your authentic self.

Not being authentic is extremely stressful. You feel you have to behave differently depending on the situation. You have to choose between being yourself and being who you think others need you to be. You develop strategies on how to behave in different situations. You don't act consistently with who you are and what you value. Everything you say or do is part of some thought-out plan.

Have you ever had that feeling about a person, that something is not quite right? Most of the time, that is your instinct telling you the person is not being genuine and authentic. You distrust them. Well, that works both ways.

Whether you are talking to the CEO or your clients, you should be your authentic self. Whether you are closing a big negotiation or interviewing for a big promotion, you



should be your authentic self. Whether you are speaking at a conference or a small staff meeting, you should be your authentic self. The same you should show up in all situations.

If you know who you are and are genuinely authentic, where you are and who you are talking to should not change. The core of who you are and what you stand for should come through every time. You may change the style with which you communicate and the clothes you might choose to wear, but these changes should not change the essence of who you are.

Respect and value yourself. Be authentic. Don't apologize for who you are. You have strengths and weaknesses. We all do. That is what makes us unique.

Authenticity gives you the courage to not get pressured into decisions that are not in line with your values. Being authentic lets you ignore the judgments of others. Being authentic lets you trust yourself.

Authenticity benefits many different professional relationships.

## LEADERS

When you consistently behave according to your values, people learn to trust you. You attract people by interacting with them in meaningful ways. You tell them the truth. People may not agree with your choices, but they will know they are based on your values—not office politics or whether or not you like them.

At times, you will make mistakes and misjudge situations and people. When those mistakes come from within your core and are consistent with your values, others will see that. Don't blame yourself or regret the decision. You made a conscious choice, even when it may have been difficult. You did not succumb to outside pressure or influences. So even when the outcome of your efforts were not as you hoped them to be, accept responsibility but know you did the right thing.

## BOSSES

When you share what you believe, with clarity and honesty, your bosses will respect you. Good leaders value independent thinkers. Good leaders do not want contrarians or sycophants. Tell them the truth, not what you think they want to hear.

Do not put your bosses on a pedestal. They are like you, with a different job description. They may be better in some things but they are people too. You are more like them than not like them. You are not less than they are.

## COWORKERS / TEAMMATES

When you consistently show up as you, your coworkers and teammates will trust you. When you get assigned to a new team or start a new assignment, you may want to try to figure out how to act to fit in. As mentioned before, this just creates stress in you and distrust in the others. Be yourself.

Take a genuine interest in your colleagues. Ask questions about them. Listen to their answers without interrupting to add your thoughts on what they are saying. When you value their thoughts and opinions, they will value yours. They know you are sincere and trustworthy. They will know you have no hidden agenda. They will know that you speak your truth and are not just going along with the crowd.

You will learn new things. Be open to new experiences and be honest about not knowing everything. You will become a valued member of the team.

## CUSTOMERS / CLIENTS

When you are authentic with your clients and customers, you become someone they trust. Sometimes, this means saying NO when something is just not in line with your values. This can be extremely difficult. But your customers and clients will recognize this. They cannot deny your authenticity and integrity. They can trust you and your service without any doubt.

That weekend, Paul thought about Trudy's words. He was trying to fit in. He wasn't showing up as himself. He made a decision to be himself. He would not try to impress others and fit in.

His work life got a lot easier. He felt less stressed. He enjoyed more honest relationships with his supervisors, coworkers and clients. ▲

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Walt Grassl is a speaker, author, and performer. He hosts the radio show, "Stand Up and Speak Up," on the RockStar Worldwide network. Walt has performed standup comedy at the Hollywood Improv and the Flamingo in Las Vegas and is studying improv at the Groundlings School in Hollywood. For more information, visit [www.WaltGrassl.com](http://www.WaltGrassl.com).





## CHARLES BURCH, JR

### **NABA Member for Life** *By Elaine W. Smith*

Charles Burch, Jr., CPA, PFS, CFP, is one of NABA's newest Lifetime Members, but he's not new to the Association and he's definitely not new to accounting.

Burch was introduced to the accounting profession in high school. "I took a bookkeeping class because I didn't have much money, and I wanted know where it was going. So, I began to keep track of my money under the watchful influence of an aunt who was very fiscally responsible," he said. After graduating high school, Burch entered North Carolina A&T State University to pursue a degree in accounting. "I knew that through accounting, you could always have a job." Burch joined NABA as a student member and participated in many NABA events. On the professional level, he initially became involved "when I didn't have a job. Through NABA, I have never had to look for employment."

Burch began his career in the auditing group of a Big 8 firm, but for the past 25 years, he has been principal of the Burch Financial Group based in Dallas Texas, and serves as an advisor for a broad range of clients, from individuals, couples and families, to sole proprietors and corporations. He specializes in guidance to growing enterprises and individuals considering business ventures. He specializes in income tax planning, strategic planning and personal strategy development. Burch says he has multinational CPA firm exposure and extensive hands-on management

experience within numerous Fortune 500 companies. He says he has taken best practices in large organizations and implemented them in varied business environments. In addition to being a CPA, Burch is also a Certified Financial Planner (CFP) and holds the Personal Financial Specialist designation.

With respect to his business, Burch says his mission is threefold: to exceed client expectations; to help clients make SMART money decisions through coaching, training and consulting; and to deliver solutions that allow them to have the right amount of resources, in the right places, at the right time.

Burch joined NABA in 1983 because of "the mentorship and genuine concern for the accounting and financial profession at every level, whether you are student, or at the professional, mid-management or senior management level of your career." He says he has served in literally every role on the chapter level and many roles on the regional level. "I became a Lifetime Member to demonstrate my commitment to NABA and to be an inspiration to others who have not yet made that Lifetime Membership commitment," he says.

To fulfill NABA's motto, "Lifting As We Climb," Chuck founded the Chuck Burch Scholarship Fund and serves as its executive director. The fund provides financial assistance to high school students going to college. For information, visit, [www.chuckburchscholarshipfund.com](http://www.chuckburchscholarshipfund.com). ▲

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Due to increased interest in Lifetime membership and to make it more convenient for members to participate, NABA has instituted three pledge methods: a one-time payment in full; an installment plan with three equal \$1,000 payments; and a monthly bank debit option through electronic fund transfer (EFT). Visit the NABA member portal at [www.nabainc.org](http://www.nabainc.org).

## We are Pleased to Recognize NABA's

# Lifetime Members

Ms. Carol A. Wilson  
Ms. Dwayna Adams  
Mr. Clifton Addison  
Mr. Enitan F. Adesanya  
Ms. Amani S. Ahmed  
Mr. William Aiken  
Mr. Abdool S. Akhran  
Mr. Ronnie R. Alexander  
Ms. Renee C. Allain-Stockton  
Mr. Marvin Allmond  
Mr. Anthony K. Anderson  
Mr. Lloyd G. Anderson  
Mr. Lee G. Anderson  
Mr. Adrian J. Anderson  
Mr. Roger G. Arrieux, Jr.  
Ms. Iris D. Atkinson-Kirkland  
Ms. Angela L. Avant  
Mr. Larry D. Bailey  
Mr. Alfred L. Ball  
Ms. Deidra M. Barksdale  
Mr. R. Everett Bassie  
Mr. Darrell Antione Baxter, CPA  
Mr. Ralph B. Bazilio  
Mr. Ronald Benjamin  
Mr. Earl S. Biggett  
Mr. Melvin D. Blake  
Mr. Allen A. Boston  
Mr. William E. Boswell  
Mr. Ken Bouyer  
Ms. Adrian E. Bracy  
Ms. Gloria E. Bracy  
Ms. Monica Brame  
Ms. Latarsha Brazle  
Mr. James D. Brown  
Mr. Odell L. Brown  
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Ms. Linda M. Bryant  
Ms. Maxine N. Buckles  
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Mr. William L. Byrd  
Mr. Willie E. Carrington  
Dr. Deborah D.G Carter  
Mr. Charles D Carter  
Ms. Ruby Cato  
Ms. Millicent Y. Chancellor  
Mr. Marvin R. Chiddick  
Ms. Paula H. Cholmondeley  
Ms. Sheila W. Clark  
Mr. Ronald J. Coleman, CPA  
Mr. William B. Coleman  
Ms. Brenda J. Coleman  
Mr. Malcomb D. Coley  
Mr. Gregory Collins  
Ms. Charlotte Louise Comer  
Ms. Anita T. Conner  
Mr. Kenneth E. Cooke  
Ms. Donna M. Cooper  
Mr. Raymond A. Cooper  
Ms. Deborah A. Cowan  
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Mr. Shaun M. Davis  
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Ms. Sandra A. Davis  
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Mr. Marvin D. Dozier  
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Mrs. Angela K. Dunlap  
Ms. Jonell Dunston  
Ms. Betty DuVerger  
Ms. Kathy-Ann Ave Edwards  
Ms. Cordelia Ekwueme  
Ms. Candice F. Elliott  
Mr. Gregory Ellison  
Mr. Patrick G. English  
Ms. Andrante C. Etheridge  
Ms. Charmain Eubanks-Thomas  
Mr. Vernon D. Evans  
Mrs. Beverly L. Everson-Jones  
Ms. Felicia C. Farrar  
Ms. Nicole A. Felix  
Mr. Cecil E. Flamer  
Mr. Erby L. Foster  
Mr. Carlyle Fraser  
Ms. Genevia Gee Fulbright  
Mr. Douglas T. Gaines, Sr.  
Ms. Vernice L. Gamble  
Mr. Fred L. Gamble  
Mr. Yosief Ghirmai  
Mr. Bertram Gibson  
Dr. Hubert D. Glover  
Ms. Robin H. Gordon  
Mr. Norman M. Graves  
Dr. John L. Green  
Ms. Verna A. Greer  
Mr. Derric A. Gregory  
Ms. Kim Griffin-Hunter  
Mr. Austin B. Groom  
Ms. Linda Guyden  
Mr. Bennie L. Hadnott  
Ms. Ann-Marie Hammond  
Ms. Brenda C. Hammond  
Mr. Thomas E. Hampton  
Ms. Donna Hankins  
Mr. B. Aubrey Harrell  
Mr. Calvin Harris, Jr.  
Mr. David E. Harrison  
Mr. David B. Harrison  
Ms. Tiffany D. Harrison  
Mr. Roland K. Hendricks  
Ms. She-lia Henry  
Ms. Yvonne F. Herron  
Mr. Jeffery L. Hill  
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Ms. Pamela R. Hogans  
Ms. Bavan M. Holloway  
Mr. V. Reginald Hopkins  
Mr. Paul Horace  
Mr. Harvey E. Hoskins  
Ms. Lisa L. Howze  
Ms. Willie Mae Hughey  
Mr. Albert R. Hunt  
Ms. Angel L. Ingram  
Ms. Dee-Ah C. Iris-Outerbridge  
Ms. Arlene Isaacs-Lowe  
Mr. Vincent James  
Mr. Curtis E. James  
Mr. Clarence L. James  
Mr. Johnny Jefferson  
Mr. Norman K. Jenkins  
Mr. Edwin M. Jenkins  
Mr. Gregory Johnson  
Ms. Patricia J. Johnson  
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Ms. Wendy P. Lewis  
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Mr. James M. Lewis  
Ms. W. Delores Lewis  
Mr. Eddie L. Lightsey  
Ms. Leona H. Locke-Dotson  
Mr. Clarence E. Lockett  
Mr. Joe N. Lowry  
Ms. Betty L. Maple  
Mr. Phillip Mark  
Dr. Lawrence T. Mathews  
Mr. Roderick L. Mayo  
Ms. Yolanda E. McBride  
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Mrs. Tina O. McIntyre  
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Ms. Barbara A. McKinzie  
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Mr. Richard McNamee  
Mr. Thomas W. McRae  
Mr. Hassan Miah  
Mr. George L. Miles  
Mr. Mark Miller  
Mr. Kevin L. Miller  
Mr. Bert Mitchell  
Mr. Judson Mitchell

Ms. Faye L. Mitchell Moore  
Mr. Daniel H. Moore  
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Mr. Dana M. Moss  
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Mr. Tillman Pink  
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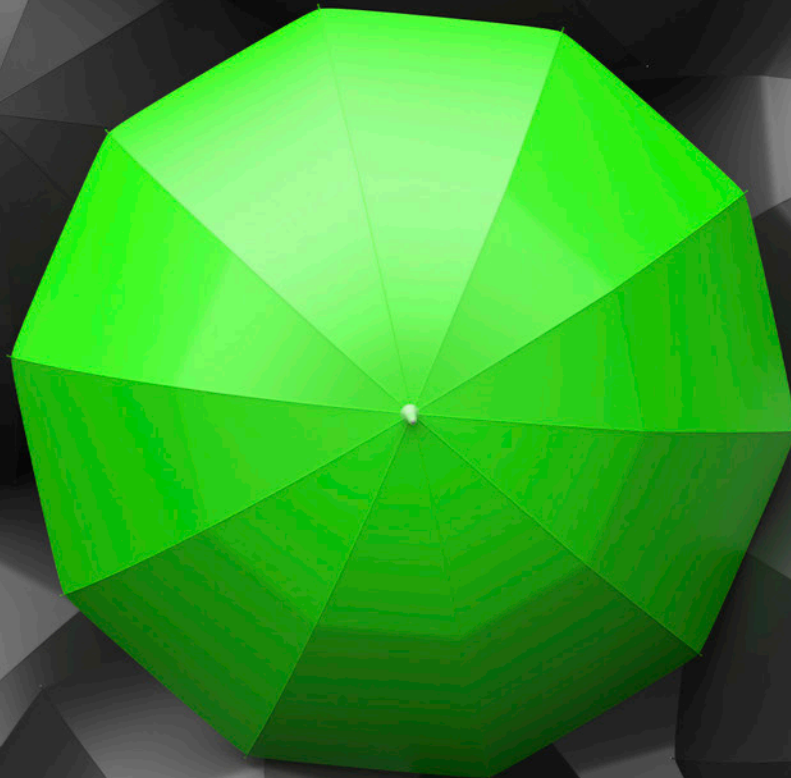
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**– Gina Major, Daytona Beach, FL**

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**June 22-24, 2016**

General Convention

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