



Beta Alpha Psi

Spring 2015 Speaker Meeting – White Nelson Diehl Evans LLP

February 5th, 2015

Guest Speakers Present:

- Gregory N. Coleman: Audit Partner
- Mark von Rotz: Tax Partner

Start Time: 1:10 pm

Announcements

- Introduction of Beta Alpha Psi Spring 2015 Executive Board
 - President: Benjamin Choi
 - Executive Vice President: Omar Bayaa
 - Treasurer: Giang Vu
 - VP of Correspondence: Abiha Kassamali
 - VP of Membership: Darren Le
 - VP of Educational Relations: Reysa Fiory
 - VP of Strategic Operations: Alex Gao
 - Recording Secretary: Eunyoung Lee
- Darren Le: BAP Membership Drive

White Nelson Diehl Evans LLP

- Introduction
 - Gregory N. Coleman: Audit Partner, Irvine office
 - Mark von Rotz: Tax Partner, Irvine office
 - Julie Pham and Kenny Le: Audit interns
 - Annie Trinh: Tax intern



- Background
 - About 80 years old, 140 people, 20 partners, and 3 offices
 - Tax/Audit: 40/60 or 50/50
 - Regional firm
 - Target
 - Privately owned middle-market firms
 - Not SEC type (Not PCAOB registered)
 - Industry
 - Various industries - wholesale distribution, construction, retail
 - Merger with Diehl Evans - government, municipal, non-profit
 - More opportunity to hire more staff and work
 - Busy Season
 - 3 separate busy seasons
 - Year-end: private (December) and government (June)
 - Tax, audit, government have different cycles (55-60 hours)
 - Public accounting is a service industry – we work when clients want
 - work/life balance
 - When you work, work and when you play, play
 - Ask staff to know what it's really like
 - Why White Nelson Diehl Evans is great?
 - Gregory N. Coleman
 - 1) Enjoys work
 - 2) Fairly compensated and rewarding
 - 3) Likes a challenge
- Recruiting Tips
 - Go to Meet the Firms
 - More firms at the MTF last semester - a better job market
 - Use BAP and AS



- Big 4 is not for everyone
- Every firm is different - it's your job to find out
- Major hiring (January), recruiting (Fall), SLP for some firms (Spring)
- White Nelson Diehl Evans does not have SLP
- Full working Internship
- Try to build relationships with more than 1 person
- Recruiting side
 - Client work
 - Meeting new people – potential interview (ex. Annie: 5k Walk)
 - Finding good people to work with current people
- Working as a team?
 - Yes, public accounting is teamwork
 - Strong technical skills and soft skills
- A list of the top accounting firms in OC, ranked by number of employees, Orange County Business Journal
- Find the right fit
 - How? Talk to professionals at MTF
 - Stress? Try to make a good impression, appearance, wait in line
- Meet the Firms
 - Be yourself and prepare
 - Slowdown – MTF is 3 hours
 - Have a plan and do your homework
 - Take some notes and follow up
 - Come up with unique questions and engage in conversation
 - Speak up
 - Personal space
 - Listen - don't ask the same question right after
 - Can you respond?
 - Ask about expertise



- White Nelson Diehl Evans (Audit and Tax) vs Others (RE and IT)
 - Go back and say thank you at the end
- Questions
 - How do we narrow?
 - Look at individual situation; Top 7
 - White Nelson Diehl Evans: Audit or Tax; Many undecided
 - Big 4 vs White Nelson Diehl Evans
 - Big (More growth opportunity) vs Small (little turnover)
 - Career vs Job
 - Travel requirement
 - Same busy season for Audit or Tax?
 - Tax (more swing and bigger spike) vs Audit (less spike)
 - Overall same hours
 - What's the difference between audit and tax?
 - Audit (more work outside of office) vs Tax (more office hours)
 - How you cross off your list
 - Audit (short list and large item) vs Tax (more complex list)
 - When should we ask someone for coffee meeting?
 - Depends on who you ask
 - When it's not busy

Adjournment Time: 2:10 pm

Minutes Prepared by: Eunyoung Lee, BAP Recording Secretary, Spring 2015