

IAPA TODAY



The Newsletter for Idaho's Accounting & Tax Professionals

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NSA District IX Governor's Message

By Joyce Funkhouser-Lingelbach EA, ATP, ATA, ARA, LTC

The NSA website was recently re-designed. Testing is being done on the new NSA MemberConnect, NSA's member-only website. NSA MemberConnect is a dynamic, private, professional community for NSA members. It will have many outstanding features including discussion/e-groups (like NSA Tax Talk), a searchable document library, blogs and a membership directory. More information on this new NSA website will be coming soon.

District IX Conventions were held in June. I was invited to attend the Washington Association of Accountants, WAA in Spokane June 16-18th. It was great visiting Spokane again and having the opportunity to visit with old friends and meet new ones. The Colorado convention was June 21-24th in Longmont, Colorado. It was great fun and the folks even invited me to

join their grand finale, Tandem Skydiving. I also got to attend the Idaho/Oregon final evening festivities, their installation banquet in Victor, Idaho, on our way back home to Portland.

If you need affordable CPE upcoming new NSA ConnectED webinars have been added to a growing list. A few on the growing list include; Penalty Games: Reducing IRS Penalties, Audit reconsideration, Cancellation of Debt-Foreclosures, and IRS Correspondence Audits. just to add a few. These new webinars began June 14th. Please check the NSA Website for the complete list of all NSA webinars and information on registering.

I hope everyone is planning to attend the NSA Convention in Anchorage, Alaska August 17-19. You can have fun fishing, sightseeing or

maybe taking a cruise, just to name a few of the attractions available in this beautiful state.

Hoping to see everyone in August at the Annual Meeting in Anchorage, Alaska.



Joyce Funkhouser-Lingelbach

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IAPA Today Goes Digital

In an effort to help curb the costs and expenses of our association, the board of directors decided to create the quarterly newsletter in a digital format, rather than producing a paper copy and mailing to our members. The cost savings in postage and printing costs is about \$2,400 a year!

I have nearly everyone's email address on file—please contact the IAPA office to let me know if you have a change, or you can go online and update the information yourself. If you haven't already logged in, go to www.iapacct.com, click on the User Login tab using your email address and the temporary password of Password 1. This will take you to your own Page where you can check to see if your contact info is correct, make changes, see which seminars you are signed up for, and even browse to see other members profiles.

New Officers Elected and Installed During Annual Convention

We had a great turn-out for the annual convention with the Oregon Association of Independent Accountants last month in Victor, Idaho. For many of us, we discovered what many people from Wyoming already know—the valley that is home to Victor and Driggs is a wonderful asset for Idaho!

NSA First Vice President Sharon Cook of St. Louis, MO, was the honored NSA guest during the convention. She was joined by District IX Governor Joyce Funkhouser-Lingelbach of Oregon.

A new slate of officers was elected by you, the IAPA membership. Thanks to all of you who returned ballots for this election. If you have anything on your mind regarding

the association or accountancy in general, you may contact any one of these board members.

Elected officers for the 2011-2012 fiscal year are:

President: Mike Chakarun, CPA, New Meadows;
 1st Vice President: Jeniele Rowley, ABA, ATP, Nampa;
 2nd Vice President: Elizabeth Gonzalez, ATP, Nampa;
 Secretary-Treasurer: Brian Haderlie, CPA, Rexburg;
 District I Director: Wilma Christensen, EA, ABA, ATP, ATA, Harrison;
 District II Director: Lupe Espinoza, Caldwell
 District III Director: Kendal Egbert, LPA, Twin Falls.

Past President LaFonda Merrick, ABA, ATP Nampa, and ISBA Representative Joan Jagels, CPA, Twin Falls, also serve on the IAPA Board of Directors.



*Enjoying an authentic Western Barbecue in Victor.
 L-R: Jerry Berggren, Reisse Perin, Jerry Tarter, Kathy Tarter, and Gear Up Speaker Melanie Mogg*



As a sign of appreciation for serving many years on the Board, outgoing District Director and Past President Gary Teuscher received the key to his new John Deere!



*IAPA Officers & Committee Chairs, L-R:
 Gary Teuscher, Jeniele Rowley, Joan Jagels, Mike Chakarun, Elizabeth Gonzalez, Wilma Christensen, Lupe Espinoza, Terry Bayless, LaFonda Merrick and Brian Haderlie*

Insurance benefits for IAPA members!

Attention Association Members! The IAPA is pleased to announce a new alliance with MassMutual Financial Group to offer association discounted products and services to **eligible members, their spouses, adult children, parents, in-laws, and grandparents.**

The initial products being offered will be Disability Income Insurance and Long Term Care Insurance. Policies will be issued on an individual basis and can be tailored to meet your specific needs. Disability Insurance will have a discount of up to 25% off policy premium and Long Term Care insurance will have up to 50% off policy premium.

MassMutual has a long standing reputation in the financial industry and is a Fortune 500 Company. As a mutual

company, MassMutual does not have shareholders. Instead its policy owners and members share in its ownership and receive dividends, which may be used to reduce premiums further in the future.

We look forward to working with MassMutual to provide our members with an added benefit of being associated with the IAPA. You may contact Chad McDonald at (208) 794-3599 or chadmcdonald@financialguide.com for more information and additional benefits that may be available to you and your family.

Please visit Chad's website at <http://www.financialguide.com/Chad-McDonald>.

Five Ways to Avoid Free Consulting *by Ruth King*

Being in the service business, usually one of the things that you enjoy is helping others. The key is to help others profitably. This means putting a limit on "free consulting." You all have clients who call, ask questions, many times the same questions over and over again, and expect to receive your expertise for free. These people take your time, which is what you sell, and expect to get it at no cost to them.

Or, you agree to meet with a potential client who comes to you with many accounting and business problems. You ask the probing questions to find out what the problems are. Then, instead of telling the client that you have the solutions to the problems, you give them the answers for free. You've just given away your expertise.

Here are five ways to avoid free consulting:

- Meetings with potential clients have a time limit – usually 30 minutes. This is a meeting to see whether there is a "match" between you and your potential clients. Ask probing questions to determine what the issues are. Then tell the potential client that you can solve those issues assuming he agrees to hire your company. Do not give him the solutions to his issues.
- Establish a "review meeting" with clients. This is a formal meeting each time you deliver financial statements or other products to your client. This avoids many telephone calls, "I just got my financial statements and I have a few questions..." which usually ends up as free consulting time to the client.
- What about quick telephone calls? Assuming they are one or two minutes, it is your choice to give the client that time. If the conversation goes on for 10 minutes, stop it and say, "I think we need to meet about this topic. What does your schedule look like?" This often stops the "free consulting."
- If your client is asking the same questions again and again, refer him to a class or course that you trust. Explain to him that you'd be happy to continue explaining the issue. However, it is probably not a good use of his money or your time. Then refer him to a class that will help him. Assuming he enrolls and takes the class, he will be a better client for you. He'll know when to question and ask thoughtful questions.
- Do what many software companies do: establish a cost for "support." Support entitles a client to X hours of your time by telephone or in person per month or year. The client pays for support up front or monthly. Then, track the number of hours utilized each month to ensure that it remains within the support parameters. If it is going over, renegotiate "support" costs.

Your time is valuable. Don't give it or your expertise away for free.

Ruth King has been consulting with small business owners for more than 30 years and learned early how to avoid free consulting. You can reach her at 770-729-8000 or at rking@turnonmyfinanciallightbulb.com.

11 Cool Mobile Apps for Running Your Practice *by Brett Owens*

Why Mobile? It's The Age of the Connected Accountant

We asked Rick Telberg, president and CEO of Bay Street Group LLC, the provider of [CPA Trendlines research](#), for his thoughts and research on mobile productivity for CPAs. He references something relatively new for the profession: "The Connected Accountant."

"Bay Street Group estimates that the added productivity provided by a best-in-class smartphone solution could yield more than \$32,000 annually in increased realization for a partner at a small- or medium-sized firm," says Rick. "Today's professional must be on call—and on the ball—24/7, or client satisfaction will suffer, staff utilization will wane or billable hours will go unbilled. The new breed of professional could be called "The Connected Accountant"—evolved to act and react instantaneously, at any time and from anywhere."

He continues: "The solution is total mobility, granting the practitioner instant access to whomever and whatever he or she needs. The new power provided by the right smartphone mobility solution can help a local firm, which represents the vast majority of practice units, compete on an even playing field with the Big 4 global behemoths."

Rick says his surveys show that accounting firm leaders agree that mobile capabilities:

- increase personal productivity,
- improve client service and satisfaction,
- increase billable hours,
- improve communications and coordination with colleagues, and
- enhance work/life balance.

Eleven Cool Mobile Apps to Consider

Alright, now that you're sold on getting a smartphone, or already in love with your current one, let's talk about the mobile apps your colleagues find the most helpful in running their practice.

VOIP and Phone Alternatives

Popular chat and (mostly) free VOIP app [Skype](#) has nice mobile versions and now supports video calls on several platforms as well. If you're outside of your voice network, but can get access to WiFi, you can use Skype to make phone calls in places where calls are impossible or cost prohibitive, such as foreign countries.

Tech enthusiast [Wray Rives, CPA](#) also loves [Google Voice](#) for centralizing his communication. "I have several different phone numbers, all of which can forward to a Google Voice number that rings to my cell phone. If I am in a meeting and can't take a call, I still get an email and text message with a transcribed copy of the voice mail."

Productivity Apps

[Evernote](#) received some love again this month – this time for its mobile prowess. [Tom Achor, CPA](#), says Evernote is his "most used app for capturing data across platforms." (Note: See what [Latreeka Williams had to say about Evernote last month here](#))

Rives again cites [Google Apps'](#) seamless integration as the best part of his new Android phone. I And have to concur with Rives; if you are running an Android, and you're not yet a full-time convert to Gmail, think about doing it now. The seamless integration will save you a ton of time and effort.

[Basecamp](#) user [Joe Oringe!](#) raved about this company's smartphone versions, saying "they've done a great job of implementing it for mobile." Joe's firm uses Basecamp for their project management needs – specifically for to dos, milestones, secure message and file storage.

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Scheduling and Getting Things Done

Scheduling app [Tungle.me](#) has been a hit with busy folks who need a hand coordinating openings in busy personal schedules. Joe Oringel says Tungle is “great for letting clients and partners schedule meetings across multiple enterprises, too.”

Finally [ToDo Matrix](#) is a “great app” for task management according to [Michael McGuigan](#) – although it is currently only available on the BlackBerry platform. Mac users may want to check out Tom Achor’s recommendation [Things](#), a GTD task management app that sync across Apple platforms seamlessly.

Social Networking on the Go

Chuck Manganiello, CPA, likes the mobile version of [LinkedIn](#) for his iPhone and iPad (it also runs now on the BlackBerry and the Android phone). And [Twitter’s](#) mobile app was the top pick for Becky Livingston, senior manager of Online Production Social Media at [CPA2BIZ](#).

Personally, the Twitter for Android was a game changer for me. I stay logged in to my company’s Twitter account and I’ve got the Droid setup to beep at me whenever [@Chrometa](#) is mentioned in a Tweet. How’s that for real-time intelligence!

And One for Your Clients, Too

[Andrew Schwartz, CPA](#), put on his entrepreneur hat and created a mobile app for his clients! The app, [UDoGood](#), launched last February and is used by several of his clients to track their non-cash contributions. If your clients need a hand tracking their tax deductible donations, UDoGood is a great one to have them check out.

About the Author

Brett Owens is CEO and Co-Founder of [Chrometa](#), a Sacramento, Calif.-based provider of time management software that accurately records and reports back how you spend your time. Previously marketed to only the legal community, [Chrometa](#) is branching out to accounting prospects. Gains include the ability to discover previously undocumented billable time, saving time on billing reconciliation and improving personal productivity. Brett is also a blogger and founder at [ContraryInvesting.com](#), as well as a regular contributor to two leading financial media sites, [SeekingAlpha.com](#) and [Minnyville](#).

Scholarship Winners 2011-2012

The Scholarship Committee, which is empowered with the task of reviewing, rating and then selecting worthy accounting students, had a difficult task this year, said chairman Kendal Egbert. During the IAPA Board Meeting, Egbert said the committee saw the toughest competition among top accounting students that they had seen in quite some years. Facing a difficult decision, the committee decided to award two \$1,500 scholarships to the following students:

- Tora Lynn Jones of Malad, ISU
- Mark Kam, of Sugar City, BY-Idaho

If you know of a worthy accounting student who is from Idaho, attends an Idaho college and will be in their junior or senior year of accounting next year, urge them to apply for the Betty Schmidt Scholarship.



District 1 Director Wilma Christensen(left) enjoys the Western Barbecue at Linn Canyon Ranch with National Society of Accountants First Vice President Sharon Cook from St. Louis, Missouri.



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Spread the Word!

As a member of the IAPA, you are our primary source to introduce your colleagues and peers to the association. Not only does IAPA membership allow you discounted pricing at our seminars, it provides you networking, opportunities for leadership development, updates on accountants around the region, and tips for improving your practice. Oh—and insurance benefits, legislative lobbying, scholarship, and oversight of accountancy ethics. All for the low price of just \$85 a year. What's not to like? Invite someone to join IAPA today!

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*Also, if you are interested in taking Live Streaming Webcasts
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association will benefit, too!*

2011 Seminar Schedule

1-888-866-2160

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|-------------|--|
| Sept. 26-27 | One-day Gear Up Business Entities ,
and/or One-Day Small Business A-Z
Post Falls
Red Lion Templin's |
| Oct. 6-7 | One-day Gear Up Business Entities ,
and/or One-Day Small Business A-Z
Twin Falls
Hilton Garden Inn |
| Oct. 27-28 | Gear Up 1040
8 am-4:30 pm
Idaho Falls Shilo Inn |
| Oct. 27 | Gear Up Ethics
4:45 pm—7 pm
Idaho Falls Shilo Inn |
| Nov. 7-8 | Gear Up 1040
8 am-4:30 pm
Boise, DoubleTree Riverside Hotel |
| Nov. 8 | Gear Up Ethics
4:45 pm to 7 pm
Boise, DoubleTree Riverside Hotel |

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