

Member Services



by Melanie Levno

Last week one of my clients stopped by my office to drop off some additional paperwork. As we were standing at the counter, his cell phone rang and he looked at me with one of those “this will just take a moment” looks and answered his phone. After greeting the caller, he said, “Hey, can I call you back? I’m at my CPA’s office, but I can call you in about an hour”. He concluded his conversation, put his phone away and then finished his business with me.

Now this client is very aware that I am not a CPA, we’ve had more than one discussion about it. In fact it was a bit of sticking point when he was first referred to my office. He had owned a successful business in California for 25 years and had just sold it and moved to the Pacific Northwest. During his 25 years of running a business, he had only ever worked with large CPA firms; he had some hesitation coming to my smaller office and in coming to me as an enrolled agent. So in our initial meeting we discussed my designation at length and he agreed to “give me a shot at it” that first year. I’m guessing he must be satisfied because I have been working with him ever since.

So why, when he knew I was not a CPA, did he still insist on referring to me as one last week?

My theory is that it comes down to a sense of prestige for him. I have a hunch, that for him, if he tells someone that he is meeting with his CPA, that the mere fact that he even has a CPA, suggests a certain level of accomplishment for him. Sort of, “Hey, my financial business affairs are so complicated that I must use the services of a CPA firm to get my taxes done.”

And I don’t think that my client is alone in his belief. I think that when an accountant has CPA behind their name, that accountant is automatically elevated by the public to a perceived level of competence that would not be conferred upon say, a tax preparer who is “just” an EA or one who is “just” an RTRP. That perception of excellence and competence is often not afforded to bookkeepers either is it? An example of this public perception of “bookkeeper” versus “accountant” versus “CPA” was driven home to me at my bank when I opened up my own business bank account. The bank officer that was helping me kept referring to my “little bookkeeping” business in a somewhat dismissive tone – if I had CPA behind my name, do you really think he would refer to my “little” business? I don’t think so, because I think those three letters “C.P.A.” have power. More power than EA, more than bookkeeper, more than accredited tax accountant. Now obviously I’m not saying that any one credential is better than others, if I thought that, then I wouldn’t proudly hold myself out as an EA or as a bookkeeper, and I am pretty sure I wouldn’t be too welcome at my Chapter meetings, but I am saying that names and titles in and of themselves have power.

At our annual association meeting in June a motion was made and accepted from the floor to raise a task force to consider changing the name of our association, from WAA, to Washington Association of Tax and Accounting Professionals, (WATAP), (this was a suggested name, the final motion that was accepted was to consider all possible name changes).

My immediate response to this suggestion was an incredulous “no way, not on my watch, who do you think you are, no way will I ever vote yes to change the name of WAA”. WAA is the organization that embraced me when I left the public accounting firm and started out on my own seven years ago. My WAA is the place that

has lifted me up both personally and professionally. WAA is the group that successfully protects my right and your right to practice. My WAA represents all accounting professionals: accountants, CPA's, financial planners, bookkeepers, RTRP's and EA's. WAA is the equal opportunity association, the one that will fight for ALL professionals, licensed and un-licensed. And my WAA has earned a place at the big kid table in Olympia. WAA representatives are consulted and included in discussions at the Governor's office, at the Department of Revenue, at the IRS liaison meetings. A representative from one state department called up and asked when we were hosting a certain seminar because they wanted to be sure to be included at our meeting. Those 3 letters, WAA, are recognized by the state tax and accounting industry.

So why, why, why would I even contemplate changing the name? Because my WAA name does not accurately reflect who we are as an association. We have name recognition at the state level, (hard-earned and deserved), but how much name "recognition" is there to our current and prospective members? Does the name WAA have the power and the immediate acknowledgment of who we are as an organization and who we all are individually?

Our association represents ALL accounting professionals, but our current name: the Washington Association of Accountants, doesn't sound like we include all accounting professionals. In fact, doesn't it suggest just the opposite; that we are a group of accountants and nothing more? Where in our name does it suggest that we have financial planners, EA's, bookkeepers, and Registered Tax Return Preparers? Heck, our name even suggests that maybe we don't even welcome the licensed CPA. Who attends our chapter meetings? Is it just accountants? Not at my chapter. And not at yours either. All of our chapters have every single professional designation represented in our membership. And look at our current and past State Boards, we have enrolled agents, CPA's, Registered Tax Return Preparers and accountants; does our current name reflect our membership? Our Chapter Meetings? Our Boards? Nope.

Names and titles have meaning and power and WAA has reached a certain level. But can we go further? According to our representatives who went to the NSA convention, there was a state accounting association that changed their name to one that suggested more inclusive membership. Immediately following the name change, that association excitedly watched their membership grow by 40%! Were they a different organization? Yes and No. They were still the same organization of accounting professionals but now there were more of them! That's what I want for my WAA. I want our name to be synonymous with success and strength. But most of all, I want my WAA and the name of my organization to represent opportunity, opportunity for all professionals to be excellent.