

Accounting Mentor Initiative

OVERVIEW

The objective of the accounting mentor program is to connect students with a business professional mentor in the field of accounting. This program is meant to provide students with an understanding of the workplace and gain communication skills necessary for success. This initiative can help students increase academic motivation, improve their reading and writing skills, provide pathways to career awareness, gain experience using technology, and promote self-confidence.

HOW IT WORKS

Each student will be connected to a professional in an accounting related career over a 5 week period of time. Each week, the mentor and student will correspond via email asking questions, sharing ideas, and discussing skills needed on the job. Mentors will help the students see the relationship between their school life and how these same skills are applied in the workplace.

Possible topics include: attendance and punctuality, managing time, positive attitude, teamwork, and getting along with others.

***Students and Mentors should CC Mrs. _____ on all e-mails.**

[@mcfsd.org](mailto:_____@mcfsd.org)

☐ ***Week 1 - Introductions:** Students should introduce themselves by giving their name, grade, classes in school, and any teams or extracurricular activities they are involved in, and any part-time jobs/responsibilities they have. Students should also share a few of their favorites, such as favorite subject in school, hobbies/interests/music. Students should ask the mentors about their job and what their daily tasks include. The student may also ask the mentor about their families or hobbies. **Week Starting November 4th**

☐ ***Week 2 - College/Post-Secondary Experiences/Career Experiences:** Students should ask mentors where they attended college or any post-secondary schooling. How did they choose the school? Looking back, what did the mentor like most about these experiences? What do they wish they could have changed about their high school or college choices and experiences? The student should also ask the mentor to describe what they like most/least about their jobs. The students should discuss their current work experiences with part time jobs. The student should describe the college/post-secondary plans they have. **Week Starting November 11th**

☐ ***Week 3 - Attendance and Managing Time:** Students should ask their mentor about work hours, vacation/sick time, and flex time. Students should ask their mentor about scheduling, frequency and length of meetings, and any unique ways they save time or manage their time. Students could discuss their school/part-time work schedule and how they manage time for school, work, family, and friends. Students will also discuss their classes and the time commitment to homework and also how they plan to manage their time after high school. **Week Starting November 18th**

☐ ***Week 4 - Teamwork and Problem Solving:** Students should ask their mentors about the teams he/she is a part of and how often their job requires them to work in a team. They should also ask whether or not their mentor gets to choose who he/she works with. The student should ask about the steps their mentor takes to solve work related problems. They should find out who the mentor seeks advice from. The mentor could share examples of types of problems they face at work, how they decide what to do, and any company policies they have to follow. The students should discuss any teams they are a part of and how they problem solve in their lives. Students could share an example of a time they had to problem solve. **Week Starting November 25th (holiday week may be challenging. If responses are delayed it will not be a problem.)**

☐ ***Week 5 - Role Models and Goal Setting:** Students should ask the mentors about the role models they have had and if the role models have changed throughout their lives. Students should also ask their mentors about goals they have set for themselves and how they are going to achieve them. Students should discuss who their role models are. They should share how and why these people have had a positive impact on their lives and how the student has changed since recognizing this person as a role model. Students should share the goals they have set for themselves and ways to reach those goals. **Week Starting December 2nd**

☐ **Week 5/6 - Face to Face Meeting:**
Students would host a luncheon with their mentors at McFarland High School.
*Introductions/possible ice breaker activity
*Lunch with mentors
*round table panel with the 2 sections of Accounting I and Accounting II

Summarize what you learned and/or what was discussed during the presentation. Use the space provided.

McFarland High School



Accounting Seminar

December 9th, 2019

Accounting Panel

_____	Johnson Block & Co
_____	McFarland State Bank
_____	AJ Restaurant Accounting
_____	Johnson Block & Co
_____	QBE Insurance
_____	UW Credit Union
_____	UW Madison
_____	McFarland State Bank

Itinerary

12:30 -	Arrival and greetings
12:40-1:00pm -	Mentors and Catered Lunch for Accounting II
1:00-1:45 -	Mentor and Student conversations
1:45 -	Transition to LGI for Panel Discussion
1:55-3:00 -	Panel Discussion and questions with Accounting I

Guest Speaker Reflection

List 3 questions you asked or could have asked during the presentation?

1. _____
2. _____
3. _____

List 7 things you learned during the presentation

1. _____
- _____
2. _____
- _____
3. _____
- _____
4. _____
- _____
5. _____
- _____
6. _____
7. _____

***I removed the names and pictures from this document to share it publicly. But when requested mentors I asked them for a headshot to put in this program. This was a good tool for the students and I saw them referencing this often.

My name is _____. I attended the University of Wisconsin - Whitewater, where I graduated with a Bachelor of Business Administration majoring in accounting in 2013. I went on to get a Master of Professional Accountancy, graduating in 2014 and then earned my CPA. I worked at the public accounting firm CliftonLarsonAllen as an associate for two years before moving on to QBE North America. I've been with QBE for three and a half years and work as a Senior Accountant of Ceded Reinsurance.

My name is _____. I have a bachelor's degree in Finance from UW-Whitewater and have worked in Accounting since 2004. I'm currently employed by _____ State Bank as a Senior Accountant. I live in Stoughton with my husband, our twin boys and our 3 dogs.

Hi! I'm _____, and I'm a senior at UW-Madison. I'm graduating in December with my bachelor's in accounting and will continue my education for 150 credits at Madison College for spring semester while taking the CPA exams. I'm also part of Baker Tilly's special recruitment team, and a BDO Campus Ambassador at UW-Madison. I'm currently working part time at _____ School District as an accounting assistant while going to school full time, and last spring I interned at BDO for busy season. After my internship I received a full-time offer and will start working at BDO in September 2020 as an audit associate.

_____ State Bank is pleased to announce _____
_____, CPA, has joined the Bank as its Chief Financial Officer. _____ comes to the role with 20 years of experience in senior leadership positions in financial reporting and accounting. At _____ State Bank, _____ primary responsibilities include management of the organization's accounting and finance staff; planning, developing, implementing and evaluating the organization's fiscal function and performance; and developing the corporation's plans and programs in collaboration with the leadership team and senior management.

Her extensive background has focused on providing audit and/or accounting services to a number of financial services-related companies including banks, insurance companies, mutual funds, and asset management companies. Prior to joining _____ State Bank, _____, a graduate of the University of Wisconsin-Milwaukee, served as the Director of Shared Services and Director of Accounting & Reporting for TDS, a Fortune 1000 telecommunications company with six million customers nationwide. Prior to that, she was Senior Vice President and Chief Accounting Officer at _____ Bank.

_____, CPA

Audit Partner, President

Oct 1991 – Present 28 years 3 months

I primarily work with non-profit organizations and small municipalities. I provide audit services, consulting, compliance auditing and non-profit tax preparation.

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Staff Accountant

Johnson Block and Company, Inc. performs a wide range of services for its clients. These include auditing for local governments and nonprofit organizations, accounting services, financial statement preparation, tax planning and preparation, computer system planning and other business consulting.

We believe the strength of Johnson Block & Company, Inc. is the personal contact with individuals at all levels within our firm, but especially the accessibility of partners in servicing your needs. Service to our clients is our first priority.

_____ has been the Accounting Manager at _____ Credit Union for the past eight years. Prior to that she was a Controller at Thomas & Betts – Power. She received both a BBA – Accounting and MBA (emphasis in Finance & Management) from UW Whitewater. In 2016 she obtained her CPA license.

After taking a few classes in high school, I decided that Accounting was the path for me. I moved from a small northern Wisconsin town to McFarland to study Accounting at MATC, now Madison College. My schooling at MATC led me to a wonderful internship during my last semester, which turned into my first full-time job. Eager to learn more, I moved to Eau Claire where I attended UW-Eau Claire to pursue my Bachelor's Degree. After graduation, I was contacted by my former boss from my first accounting job. She made an offer I couldn't resist, so I packed up my family and moved back to McFarland. Outside of my love for balancing numbers, I love spending time with my family! I have two children and a husband that keep me active. I have recently started coaching basketball through McFarland Girls Basketball Boosters. When I'm not working or at a McFarland sporting event, I love to be on the street running!