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Lumsden & McCormick, LLP

PAGE 2

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Lumsden & McCormick, LLP

Recently distinguished as one of 2008's Best Places to Work in Western New York, Lumsden & McCormick, LLP is one of Western New York's largest regional certified public accounting (CPA) firms. For more than half a century, this firm has been taking both its clients and its employees "beyond the numbers."

Founded in 1952 in downtown Buffalo, Lumsden & McCormick provides professional services to commercial businesses, individuals, government entities and nonprofit organizations. But, in the spirit of its beyond-the-numbers brand, Lumsden & McCormick offers services "beyond" the traditional accounting, auditing and tax. Providing a wide range of high-value, interdisciplinary services, it also offers a full complement of tax planning, business consulting and financial planning services. Its wholly-owned subsidiary, Brisbane Consulting Group, LLC, offers litigation support services, including forensic accounting and business valuations, to clients throughout New York state, while its software division sells, installs and supports nonprofit accounting software.

More than simply a catchphrase, "beyond the numbers" became Lumsden & McCormick's marketing brand nearly 10 years ago. It wasn't until the last two years, however, that the firm captured the synergy of this brand for use in its recruitment efforts. In a professional field known for its extremely competitive recruiting environment, Lumsden & McCormick knew it needed to distinguish itself from other accounting firms — and it has come a long way towards doing so.

"Beyond the numbers' has become our vision for the experience we want all of our employees to have," said Managing Partner John Oehler, CPA. "We are so much more than a typical accounting firm, and the 'beyond the numbers' employment brand is our way of articulating what we offer, what we promise and, quite frankly, what we do every day."

Finding your place

Sherry DelleBovi, CPA and partner, said, "Probably one of the most important ways employees go beyond the

numbers here begins with the services that we offer. Employees have exposure to a wide range of clients and the firm is large enough to accommodate their professional aspirations." That means building a personal career path, including transitioning to a different client niche and building a specialty, is both available and encouraged.

Chris Kicinski, CPA, has done just that. After spending several years in the audit department, he transitioned to tax, and is now a financial planner with Lumsden & McCormick Financial Services. "I think there are both accounting students and professionals who believe, mistakenly, that only 'Big Four' experience will get them the knowledge, experience and exposure they need to succeed," he said. "I've been completely supported at Lumsden in choosing a career path based on my interests."

Audit manager Jill Schaefer, CPA, agrees. "I've been able to grow and advance my career much more rapidly here than I thought possible," she said. Promoted to manager within four years of joining the firm, she is responsible for predominantly health care-related clients and recently earned her certified healthcare financial professional (CHFP) certification. "You're expected to take responsibility for your career," she said, "but you can count on support and guidance from partners and colleagues throughout."

Learning something every day

Taking employees beyond the numbers also means providing opportunities for them to learn and grow. That's why each year over 100 hours of in-house and off-site training and educational opportunities are offered to every accounting professional at Lumsden & McCormick.

Last year the firm rolled out L&M University, a comprehensive pro-



From left: Robin Brand, Mark Janulewicz and Michael Conway. On the cover: Conway, Brian Kern and David Schlein.

fessional development curriculum focused on honing employees' business development, leadership, management and communication skills. Featuring certified trainers, including the University at Buffalo's Center for Executive Development instructors, "it's set up much like a traditional university with courses appropriate to the employees' professional levels," said John Schiavone, CPA and partner.

In addition to instructor-led training and learning, Lumsden & McCormick offers a Professional Associate Learning (PAL) program for new employees and a firm-wide mentoring program. Thanks to this program and his professional mentor, said Michael Conway, staff accountant, "I've been introduced to some of Buffalo's most well-respected business leaders, and I'm developing a strong professional network of my own, even though I've been here less than two years."

Donna Gonser, CPA and partner, said that "continued professional development is a priority for us. It translates into our competitive advantage and, ultimately, ensures the firm's and the employee's continued success."

And when you're not learning ...

"Enjoy yourself," said Daria Shanchuk, senior accountant. "Work should be a place you look forward to going to every morning, and the people make all the difference. You spend at least one third of your time at work so it should be a rewarding experience." The firm's leaders frequently bring staff together to recognize and celebrate their hard work — especially at the end of the busy seasons, the start of

summer (with the Annual L&M Golf Outing) and, of course, the holidays.

"We don't really need an occasion to get together," said Bill Allen, staff accountant. "There are some very solid friendships here and it's great to work with people you can, and want to, hang out with after work." You don't even have to actually leave the office to have fun, either. The firm offers a recreation room which boasts a regulation-sized ping-pong table, foosball table, widescreen TV with cable and other amenities.

Life outside of work

As part of the firm's philosophy, its leaders have spent the past several years building a culture that recognizes that employees have a life "beyond the numbers" and the day-to-day work of accounting. "We're cognizant of public accounting's reputation for unforgiving hours and schedules," said Dave Schlein, CPA and partner, "so we're constantly looking for ways to help our staff create an effective balance between their personal and professional lives."

It helps that more than 75 percent of the firm's clients are in Western New York and many of them are within an hour's drive. And when the time comes to get away, the firm's generous compensation, vacation and time-off benefits are in place to support that. Of course, providing client service sometimes extends beyond the traditional nine-to-five workday, but employees earn "banktime" — a compensatory time bank earned for working overtime. In fact, Lumsden & McCormick is one of the only firms in

the area to offer this benefit, allowing employees to either take the time off or take it as additional compensation.

Achieving success beyond the office

While much of an employee's learning is understandably focused on technical proficiency, Lumsden & McCormick provides a wide array of opportunities for professional accounting staff to experience their profession outside of the office. Again, with an understanding that success in public accounting is more than simply "the numbers." Even the newest members of the firm are encouraged and supported in these endeavors.

Said senior accountant Mollie Godzich, "I expected the first few years

of my career to be very focused on simply accounting work, but I've taken part in a lot of recruitment activities and networking events in the short time I've been at Lumsden. I'm honing professional skills that really can't be, and weren't, taught in college, all with the support of people who've advanced in their careers the same way."

At Lumsden & McCormick, there is also a strong commitment to the community, and everyone is expected to "give back." Nearly half of all its professionals, even the newest staff, serve on the boards and committees of: cultural, educational and health care organizations; towns, cities and counties; business groups; charities; and many other good causes. In addition to this "profes-

sional power," said Maria Gambacorta, director of marketing, "we put our money where our mouth is with over \$350,000 in charitable donations and support over the last five years alone."

From concept to reality

Bringing the beyond-the-numbers brand into focus as a recruiting initiative seemed appropriate for what has long been evolving both in the profession and at Lumsden & McCormick. The stereotype of straight-laced, repetitive and perhaps even boring work no longer holds as the profession undergoes a transformation.

"At Lumsden & McCormick, nobody shows up to just work," noted Eileen Connor-Costilow, director of human

resources. "This is also where we're learning, building relationships, having fun, growing, and developing, both personally and professionally. We knew that 'beyond the numbers' as an employment brand would be a powerful reflection of that."

"Our employees are passionate, creative, and the reason we've enjoyed over 55 years of success in business," said Oehler. "They prove every day that this profession is about so much more than just numbers."

For accounting professionals who are interested in learning more about going "beyond the numbers," visit Lumsden & McCormick's Website at www.lumsdencpa.com.

Use your natural talents to build a career from home

If you're a mom in the workplace and would prefer your living room to the boardroom, you're not alone.

A 2007 Pew Research study found that nearly 20 percent of working mothers would prefer not to work outside the home and 60 percent of women say part-time work would be ideal.

"Working from home can be an excellent alternative, as well as a social and creative outlet, for those moms who wish to contribute financially to their families while staying at home with their children," says Shelli Gardner, CEO and co-founder of Stampin' Up! "When looking for a job, at home or otherwise,

mothers should focus on opportunities that reflect their personal interests and where they can make a difference."

Gardner offers these tips to women looking to work from home:

- Pursue Your Passion — You'll be more successful and productive working in a job about which you are passionate.
- Identify Options — It is important to identify a variety of work-at-home options and look at them carefully to determine which one is best for you.
- Do Your Research — Make sure to talk to other women who work at home with the one or two companies you've

identified to find out how they are enjoying their experience.

When determining if you should work from home, ask yourself these questions. Is working from home about:

- making money
- saving money
- being near your kids
- pursuing your passion
- enjoying a social environment?

Gardner says her company — which is a leading manufacturer and distributor of an exclusive line of decorative rubber-stamp sets and accessories for home decor, greeting cards, craft projects and scrapbooking — offers wonderful work-

at-home opportunities.

"We provide women with the opportunity to build their own business as independent contractors and work from home while doing what they love — sharing creativity with family and friends in the home environment," explains Gardner. "Women also enjoy the flexibility and balance that can support their family, work and personal goals."

For more information about work-at-home opportunities, visit www.stampinup.com/workathome or call (800) STAMP-UP, code Homebiz108.

— NAPS

What makes young people volunteer?

Many believe that volunteer work can be beneficial for young people's personal development and that their communities can benefit as well.

When teenagers volunteer, it's thought they typically become more sensitive to the needs of others, build self-esteem and self-confidence, develop organizational and leadership skills and gain a great deal of personal satisfaction. As a result, many parents want to know: What motivates young people to become volunteers?

The Prudential Spirit of Community Awards, the nation's largest youth recognition program based solely on volunteer service, recently took a look at its top honorees over the past 10 years and found some answers to that question.

According to its analysis, the most

common motivators appear to be:

- Exposure to a need-first-hand experience in seeing others who are poor, sick, homeless or who need assistance for some other reason
- Parental example/encouragement-learning from a mother or father that volunteering is important, and receiving strong encouragement and support to get involved
- Organizational activities — fulfilling a community service requirement for a school, church or scout troop, or joining a club that emphasizes volunteerism
- A personal crisis — such as an illness, or the death or injury of a friend or family member
- A simple request — being asked by someone to lend a helping hand

When that same analysis looked for the factors that successful youth

volunteers seemed to have in common, it found that, in general, students succeeded by:

- Choosing activities in fields they were interested in
- Recruiting friends, family members and others to help
- Seeking advice and guidance, when necessary, from experts
- Promoting their projects through public speaking, news media outreach, the Internet and other communications channels
- Refusing to be discouraged when told they were too young or inexperienced

For a free copy of "Catch the Spirit: A Student's Guide to Community Service," write to Federal Citizen Information Center, Catch the Spirit, Pueblo, CO 81009, call (888) 8-PUEBLO or visit www.pueblo.gsa.gov.

pueblo.gsa.gov.

Information is also available at www.prudential.com/spirit.

— NAPS

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