



CPA WEEK VOLUNTEER GUIDE

everything you need to know for a successful presentation!



ABOUT THE INDIANA CPA SOCIETY

The Indiana CPA Society is a statewide professional association representing nearly 6,000 CPAs in public practice, corporate finance, government, and education. INCPAS serves the public as well as its members. The organization functions as an advocate for the profession through education, public awareness, government relations, and promotion of high ethical standards. Programs and services offered by the Society are designed to meet the needs that have been identified for its diverse membership.

CPA WEEK



CPA Week, a career awareness program developed by the Indiana CPA Society, plays a crucial role in the Society's overarching strategy to foster the growth of the CPA talent pipeline. The program was even rolled out nationally in November 2022.

During CPA Week, CPAs come together to engage with Indiana high school students, offering them a unique glimpse into the exciting world of accounting.

Volunteers share insights on what makes their careers truly fulfilling. They provide invaluable insights into the wide array of opportunities in the profession, debunk common myths, and share resources for students to learn more.

Since its inception in November 2020, INCPAS volunteers have impacted 5,669 students across 256 presentations. As we move forward, we eagerly anticipate expanding our reach and touching the lives of even more students during the upcoming fall CPA Week.



WHO WE ARE

If you have questions, concerns or feedback about CPA Week, please do not hesitate to contact your INCPAS Pipeline & Outreach team.



I'm Ali Tonini, the VP-Workforce & Leadership at the Indiana CPA Society. I work with students, CPA Candidates, educators...*a lot*. I will be your main point of contact for CPA Week. If you have questions about your presentation, have ideas on improving the program or need help during CPA Week, just reach out!

How to reach me:

Cell: (317) 607-4358 or (317) 726-5025

IG: @incpas_scholarsEmail: atonini@incpas.org





I'm Anyah Cork, the workforce development associate at the Indiana CPA Society. I work on our high school and college student initiatives and am here to assist with CPA Week. I ensure our educators receive CPA Week materials in advance of your presentation.

How to reach me:

Cell: (317) 726-5006 **Email:** acork@incpas.org



SPONSORS

CPA Week would not be possible without the generous support of our sponsoring organizations. These organizations provide financial support for this program and the Society's pipeline initiatives. They enthusiastically support their staff to volunteer as mentors, host office visits, visit high schools and more.



































FREQUENTLY ASKED QUESTIONS

1 What is the expected time commitment?

CPA Week volunteers should expect to spend about 2 hours. We recommend all volunteers spend time reviewing this CPA Week Volunteer Guide, watching the training video & run through the presentation. The actual presentation typically runs 45-60 minutes. You will want to arrive about 15 minutes before your class begins.

- 2 Do the students have any accounting experience?

 It really depends on the class. Some students may have taken a semester or two of accounting, others may be in their first accounting class. This is why it's important to review this CPA Week Volunteer
- If an unexpected event occurs and I am not able to attend my presentation, what should I do?

Guide, so your message will resonate with the students.

If something comes up a few days prior to the presentation you are encouraged to try and find a replacement volunteer on your team. If you find someone to cover your class, just let INCPAS know.

If something comes up on the day of your presentation: You should email the teacher and copy Ali Tonini (atonini@incpas.org). If INCPAS can find another volunteer, we'll coordinate with the teacher and the volunteer.

What is the suggested attire for the presentation?

You are encouraged to wear whatever you would typically wear to work. If you wear jeans and a polo shirt, feel free to wear them for the presentation. If you want to dress up, do that. The idea is to help students see the realities of the profession.



5 Do I need to create my own presentation?

No. INCPAS will provide you with a presentation. We want presenters to use these slides to ensure students hear a consistent (research-backed) message.

6 Am I required to use the presentation materials?

Yes! All CPA Week volunteers are asked to use the CPA Week presentation. The Society uses the Center for Audit Quality's research on the influences and expectations of high school students and incorporates many of their interests into the presentation. We want all students to hear a consistent message.

Where can I learn more about the CAOS student research?

No. Unless you are told otherwise, all presentation materials will be sent directly to the school in advance. The teacher will distribute the materials at the start of your presenta

8 What information/materials do the students receive in advance of the presentation?

Students will receive the *Accounting Can Help Create the Life You Want* brochure and the *INCPAS Student Membership Card*. Please encourage them to use the QR Code to join as a free member.







9 Will I need to bring anything with me to the presentation?

No. Unless you are told otherwise, all presentation materials will be sent directly to the school in advance. The teacher will distribute the materials at the start of your presentation.

10 Can I schedule my own presentation?

Sure. If you want to schedule your own presentation, just let INCPAS know where you are going and how many students you are expected to reach. We will send you materials that can be distributed in advance of your presentation. You are still expected to use the CPA Week presentation materials.

The No-No's



Acronyms: It's so easy to slip into "CPA speak" but remember, you are talking to high school students who will not know the majority of the acronyms you would say. If you do use an acronym, follow it with what the word means.

Gold Star for Working A Lot: We know there are busy times and that you may experience long hours. Saying, "Well, I've worked 96 hours the last 2 weeks!" will not score any points with the students. We aren't suggesting you be untruthful, but for their first introduction to accounting, we want to stay positive.

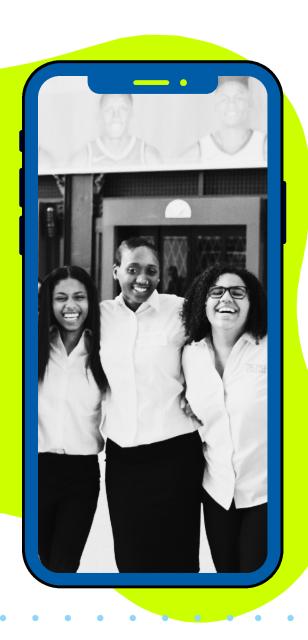
CPA Exam & License Details: At this point, hearing the details of passing the CPA Exam and getting the necessary hours to become a CPA, is just too much information for a high school student. INCPAS works to help **college students** better understand the requirements and the value of obtaining the CPA license. For CPA Week presentations, we're sticking to the basics: **Opportunities in Accounting**.

Remember: De positive & show your enthusiasm for accounting!



THE DETAILS

CPA Week presentations require a lot of coordination. We will give you everything you need for a successful presentation and try and make this volunteer experience as easy as possible for you. We want you to spend your time having fun with the presentation and sharing what makes the CPA profession great!



WHAT TO EXPECT

Calendar Invite

Once you commit to a presentation date/time, you will be sent a calendar invite. This invitation will include the school name, address, date, time, teacher & teacher's email address.

Materials Email

Two weeks before the start of CPA Week, volunteers will receive an email with this guide! It will also include presentation details, an overview of the slides & a link to the slides.

Introduction Email

A week before your presentation, you will receive an email that includes the teacher. This email is an introduction and an opportunity for the teacher to give any final instructions (typically, they will provide check-in details & parking instructions).

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INFLUENCE STUDENTS

Giving a presentation to high school students can be a challenging experience. Unlike doing a college presentation, students are required to be in class, and depending on the class, not every student will be interested in the content. Experiencing a disengaged student (or class) can be disheartening. However, rest assured that you are making an impact on the students! We asked Indiana high school educators to share their tips for connecting with students.







for connecting with students!

Don't be intimidated by how students may respond but just lean into a fun cool way to connect with them first.

Oftentimes, conversations are difficult with students when they don't feel a connection.

Make small talk with the students as they enter the class and sit down. Asking what their favorite food is or what they're watching on Netflix is a quick way to connect with students.

Standing in the back of the classroom looking at emails on your phone is not the best way to establish a good connection.



Ven Schultz

Have you watched anything good on Netflix lately?



PRESENTATION PREPARATION

It's important that you prepare for your presentation. Follow the four to-do's for a successful presentation. Also, be sure to check out the day of to-do's and review the materials that will be distributed in advance of your presentation.

TO-DO'S

Confirm Presentation Details on calendar invite.

Make sure the presentation is on your calendar & double check the details.

Review the CPA Week Volunteer Guide

If you made it this far, you are actively completing this step. Great job!

Watch the Volunteer Training Video

This training will walk you through the presentation, slide-by-slide. It takes about 15 minutes and is hosted on Canva. Just click present and you'll enter the training.

Practice

Take time to think about what you want to say, the stories you plan on telling, and how you are going to explain concepts.

Day of to-do's

The presentation and materials were sent to the teacher before your presentation. Ask them to put the presentation on the screen when you arrive and distribute the CPA Week student materials. (Examples below)







CPAWEEK PRESENTATION DISCUSSION GUIDE

all the info & details you'll need for a successful presentation!



PRESENTATION OVERVIEW

Before we dive into the presentation, it's important that you understand our goals with CPA Week and the strategy we're taking when discussing career opportunities with high school students.

The focus of this CPA Week presentation is on accounting itself, rather than the CPA license. Our primary goal is to **expose students to the vast array of opportunities that accounting offers**, dispelling any misconceptions that may shroud it. And, we want to do this in a way that resonates with the audience: high school students.

While CPA Week is one of the many steps the Society is taking to help build the CPA talent pipeline, talking about the intricate details of the CPA profession (the education, the Exam, the experience, the license) is too much information and not necessary at this point. Rather, we want to focus on accounting as profession of opportunity and stick with the basics.

To prepare for your presentation, you should review this toolkit and the presentation slide discussion guides. Additionally, in the online training, Ali Tonini will walk you through each slide and offer tips, suggestions and insights.

Throughout the presentation, you will explore the multifaceted nature of work that accountants engage in, showcasing the diverse career paths that accountants have. The presentation begins by answering the question: "What is accounting?"

Next, you'll walk through accounting myths that are *quickly* followed with the realities of accounting. You'll then move on to several examples of accounting career paths. This is where you can talk about what you do!

Later in the presentation, you will introduce students to the benefits of the Indiana CPA Society's free student membership, emphasizing the wealth of resources it provides for those eager to embark on their accounting journey.

In addition, you will share the support and guidance available from our partners at Accounting+, ALPFA, and NABA. These organizations are dedicated to nurturing future accounting professionals, and we share the opportunities they offer to students.





PRESENTATION AGENDA

IN CPA

- 1 Introductions
- **2** What is accounting?
- **3** Accounting myths & realities
- **4** Variety in accounting jobs
- 5 INCPAS high school student membership
- **6** Accounting+ & NABA
- **7** Sponsors



WHAT IS ACCOUNTING

WHAT IS ACCOUNTING?

Accounting is the language of business. Accountants know how businesses works, how they function and how they present themselves to the world... through their financial statements.

Discussion Guide:



Remember to keep your language simple and relatable to high school students. Think "back to the basics."

- **Introduction to Accounting:** Explain that accounting is often referred to as the "language of business." It's a fundamental part of how businesses operate and communicate their financial health.
- Understanding Business Operations: Emphasize that accountants play a crucial role in understanding how businesses work. They are like financial detectives who examine and analyze various aspects of a company's finances.
- **Why Accounting Matters:** Explain that accounting is not just about numbers; it's about helping businesses thrive and make responsible financial choices. Accountants are like financial advisors for companies.



ALL ABOUT YOU!



Discussion Guide:



This is where you'll tell the students about yourself and your career path. You have several prompts on the slide, but feel free to share different aspects of your career. Just remember, the no-no's from page 7!

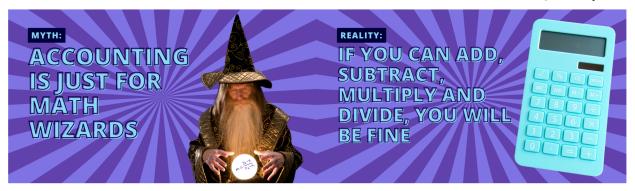
Take time to really think about your answers and remember what resonates with high school students.

• **Favorite Part About Your Job:** Be sure to elaborate on this. If your favorite part of your job is "solving problems" then give an example of how you solved a problem. If you love helping people, tell them a story about how you helped a client.



MATH WIZ

Slides 4-5



Discussion Guide:



This slide aims to dispel the common myth that accounting is solely for math geniuses by emphasizing that accountants primarily use basic math skills. It's important to reassure students that a strong affinity for advanced math is not a requirement for success in the field of accounting.

- **Basic Math Skills:** Emphasize that while math plays a role in accounting, it's primarily basic arithmetic, such as addition, subtraction, multiplication, and division. Accountants use calculators and software to perform complex calculations, so you don't need to be a math prodigy.
- **Problem-Solving and Analysis:** Highlight that accounting is more about problem-solving and analytical thinking. Accountants analyze financial data, interpret trends, and make strategic recommendations to help businesses thrive. It's about understanding the story behind the numbers.
- **Technology and Tools:** Mention that technology has transformed the accounting profession. Accountants rely on software and tools that automate many mathematical tasks. Being tech-savvy and having a knack for using accounting software is just as important as math skills.



MORE THAN TAXES

Slides 6-1



Discussion Guide:



High school students always think accountants exclusively focus on doing taxes. In reality, the accounting profession encompasses a wide range of roles, and many accountants never work on tax returns. It's essential to emphasize the diversity of tasks and responsibilities within the field.

- **Diverse Roles in Accounting:** Highlight that accounting is a multifaceted profession with a variety of career paths. While some accountants and CPAs specialize in tax preparation and planning, many others work in areas such as budgeting, financial analysis, strategic planning, and more.
- Non-Tax Roles: Provide examples of non-tax-related roles within
 accounting, such as financial analysts who assess a company's financial
 health, management accountants who focus on internal financial
 reporting, and forensic accountants who investigate financial irregularities.
 Mention that these roles don't involve tax work.

If you don't work in tax, you can mention that.



NOT RIGID & OLD FASHIONED

Slides 8-9



Discussion Guide:



This slide tackles the misconception that accounting is a static, unchanging profession. In reality, accountants are at the forefront of technological innovations and constantly adapt to new tools, software, and trends. It's important to convey that accounting is a dynamic field, evolving with advances in technology and business practices.

- Technological Advancements in Accounting: Emphasize that
 accountants use cutting-edge software, including AI, blockchain, and cloud
 computing, to streamline processes and enhance decision-making.
 Highlight how these technologies make the profession more efficient and
 versatile than ever before.
- **Flexibility and Adaptability:** Accountants must continually learn and adapt to emerging trends in data analysis, automation, and cybersecurity. Provide examples of how accountants incorporate new skills and tech to address challenges in a digital economy.
- Innovation in Accounting Roles: Show how the profession goes beyond traditional bookkeeping and tax preparation. For example, forensic accountants use advanced software to detect fraud, and management accountants use predictive analytics to shape business strategies. These roles demonstrate the adaptability and innovation inherent in modern accounting.



EVERY BUSINESS NEEDS ACCOUNTANTS Slides 10-11



Discussion Guide:



Here you will debunk the misconception that accountants are confined to working exclusively in accounting firms. In reality, individuals with accounting skills are in demand across various industries, emphasizing the versatility and wide range of career opportunities within the field.

- **Versatile Career Opportunities:** Stress that accounting is not limited to just CPA firms. Accountants are essential in every industry, including healthcare, technology, entertainment, non-profits, and more. They play a crucial role in managing finances and making informed decisions.
- **Tailored Career Paths:** Explain that accountants have the flexibility to choose a career path that aligns with their interests. If someone is passionate about a particular industry, they can specialize in that field as an accountant and contribute to its success.

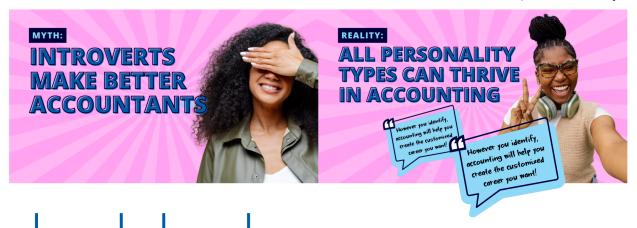
Later, you'll dive into a few examples of the various opportunities for accountants.

No need to spend a lot of time here.



INTRO/EXTROVERTS

Slides 12-14



Discussion Guide:



By addressing this myth, you can help students understand that the accounting profession values diversity in personality traits, and there is no singular "best" personality type for success. Instead, it's about leveraging individual strengths and adapting to various situations to excel in the field.

• **Finding Your Fit:** Encourage students to recognize their own strengths and preferences and choose a career path within accounting that aligns with their personality. There's no one-size-fits-all approach, and the profession offers roles suited to various personality types.



In this brochure, they'll find a OR code to take a quiz about what kind of accountant they are!



MAKING MONEY

Slides 15-16



Discussion Guide:



This slide aims to challenge the misconception that accountants have limited earning potential. In reality, accountants can achieve a high level of financial success, and their earning potential is virtually unlimited, especially as they advance in their careers.

- **Specifics:** Students sometimes ask, "How much do you make?" If you aren't comfortable telling them (you don't have to) tell them about the Salary Guide! Also, **giving them your intern hourly rate is always helpful**.
- **Salary Guide:** The example salaries are from the 2024 Robert Half Salary Guide and students can easily download it to see the salaries of many accounting and finance positions.
- Career Progression: Emphasize that as accountants gain experience and advance in their careers, their earning potential increases significantly.
 They can move into higher-paying positions such as managerial roles, financial analysts, controllers, and eventually, CFOs.
- Obtaining the License: You can give a quick mention that pursuing the CPA license can substantially boost earning potential. CPAs often command higher salaries and have access to a broader range of career opportunities.



TRAVEL OPPORTUNITIES

Slides 17-18



Discussion Guide:



This is "the Travel" slide! It can help students understand that accounting positions can include travel, making it an appealing option for those with the travel bug. Students never realize that they wouldn't have to pay for "work travel" and those expenses are covered by the employer.

- **Global Opportunities:** Mention that the accounting profession is not limited to a single region or country. Accountants with international clients or working for multinational corporations may have the chance to travel internationally, experiencing different cultures and business practices.
- **Field Work**: Discuss roles like forensic accountants or auditors, who may need to visit different clients.
- **Conferences and Training**: Even if you don't travel for work, you can mention training opportunities that accountants can travel for.



If you've been to cool places, give the students a few examples!



BUSINESSES OF ALL SIZES

Slides 19-20



Discussion Guide:



This slide addresses the misconception that accountants are only necessary for large corporations. In reality, small businesses benefit greatly from accountants, who help manage finances, ensure compliance, and guide strategic decisions. It's important to show students that accountants provide value to businesses of all sizes.

- Role of Accountants in Small Businesses: Emphasize that accountants play a crucial role in helping small businesses stay financially healthy. They handle essential tasks such as bookkeeping, budgeting, and cash flow management—key factors for the success of any business, regardless of size.
- **Strategic Advisors for Growth:** Accountants for small businesses often go beyond number-crunching. They serve as strategic advisors, helping entrepreneurs make informed decisions on expansion, investments, and operations. Highlight how accountants can help with setting financial goals, tax planning, and navigating regulatory requirements.
- **Personalized and Tailored Support:** While large corporations have entire accounting departments, small businesses may only need a single accountant or CPA. This creates a more personalized relationship, where the accountant provides tailored solutions that fit the specific needs of the business, offering hands-on guidance and support.



AI IN ACCOUNTING

Slides 21-22



Discussion Guide:



This slide addresses the fear that AI will replace accountants. In reality, AI is reshaping the profession by automating routine tasks, allowing accountants to focus on higher-level, value-added work. It's important to reassure students that AI enhances, rather than eliminates, the role of accountants.

- Al as a Tool, Not a Replacement: Emphasize that Al is designed to handle repetitive, data-heavy tasks such as data entry, invoice processing, and reconciliations. This frees up accountants to focus on critical thinking, strategy, and analysis—areas where human insight is essential.
- **Elevating the Role of Accountants:** With AI taking care of routine work, accountants have more time to advise businesses, analyze financial trends, and help with decision-making. Highlight how AI complements the profession by increasing efficiency and enabling accountants to take on more strategic roles.
- The Future of Accounting with AI: Show how AI is transforming accounting into a tech-forward profession. Accountants who embrace AI tools will be able to work smarter, not harder. Mention how skills like interpreting data from AI-driven software and applying it to business strategies will be increasingly important, making accountants indispensable in a tech-enhanced future.



ENTREPRENEUR

Slides 23-24





Discussion Guide:



Students are very interested in entrepreneurship and don't often realize that having accounting skills can help them be successful business owners. They don't even think of firm partners as business owners.

- **Entrepreneurial Opportunities:** Start by explaining that accountants are well-positioned to become entrepreneurs and business owners. Their financial acumen, budgeting skills, and ability to manage financial data are invaluable when starting and running a business.
- **Role of Accounting Skills:** Emphasize that accounting skills, such as financial forecasting, budgeting, and financial analysis, play a pivotal role in an entrepreneur's ability to make informed financial decisions about their business.
- **Phil Knight and Nike**: Introduce Phil Knight as a prime example. Mention how he founded Nike and initially worked as an accountant before tapping into his accounting skills and founding Nike. He is now the 24th richest person in the world...
- **Jordan's:** Just an FYI, the background of this slide is various Jordan's...students love them. And if you have a pair, feel free to wear them to your presentation for some extra cool points.





NFP & ESG

Slides 25-26



Discussion Guide:



NFP: By discussing the rewarding nature of working for not-for-profit organizations, you can inspire students who are interested in helping their communities to consider accounting as a pathway to make a meaningful impact through their financial expertise.

- **Be a Part of Something Bigger:** Emphasize the opportunity to be part of a mission-driven organization that works toward positive change.

 Accountants in not-for-profits play a vital role in advancing these missions.
- **ZeNai sAVAGE:** The CPA highlighted on this slide is ZeNai Brooks, INCPAS Board Member, who uses her passions and accounting skills to give back to the community.

ESG: By discussing the role of accountants in ESG analysis and reporting, you can inspire students to consider accounting as a pathway to contribute to a more sustainable and responsible business world while using their financial expertise to make a difference. Students care a lot about this.

• **Accounting's Role:** Emphasize that accountants are well-suited to address ESG concerns. Their skills in data analysis, financial reporting, and risk assessment can help companies measure, report, and improve their ESG performance.



FORENSIC ACCOUNTING

Slide 27





Discussion Guide:



Here you will engage students' interest in solving financial puzzles and how accountants have the opportunity to make a significant impact in preventing and uncovering financial misconduct.

- **Uncovering Financial Mysteries:** Explain that forensic accountants are financial detectives who investigate financial discrepancies, fraud, and misconduct. They use their accounting skills to follow the money and unravel complex financial mysteries.
- **Minimizing Loss:** Emphasize that forensic accountants work with organizations to identify weaknesses in financial controls and procedures. By doing so, they help minimize and prevent financial loss.
- Aiding Legal Cases: Mention that forensic accountants often collaborate
 with law enforcement agencies and legal teams. They provide critical
 financial evidence in criminal and civil cases, helping to catch individuals
 involved in financial wrongdoing.

An awesome forensic accounting documentary on the largest case of municipal fraud in American history is All the Queens Horses on Netflix.

It's awesome!



STUDENT MEMBERSHIP

Slide 29-30



Discussion Guide:



Now you'll promote the benefits of joining the Indiana CPA Society as a student member. Please encourage students to take advantage of the free student membership and highlight the valuable resources and opportunities it offers.

We're also giving 20 new student members a \$20 Starbucks gift card.

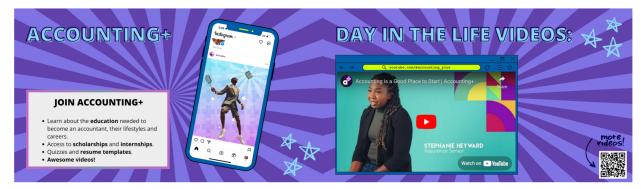
- **QR Code Registration:** Encourage students to utilize the QR code provided on the screen (on the slide after the benefits) or in their materials to register quickly and easily. A one-minute registration process can open doors to numerous benefits.
- **Give them Time:** Give the students 2 minutes to join as student members.
- **Measuring Success**: One of the quickest ways we can tell if the CPA Week presentations are making an impact is by tracking new memberships. This isn't a slide to skip over. When INCPAS has more high school student members, we have the opportunity to connect with and share resources with more future accountants!





ACCOUNTING+

Slide 31-32



Discussion Guide:



Similar to the INCPAS student membership slides, now you'll introduce the students to Accounting+. They have incredible resources for high school students.

- **QR Code Registration:** Students can use the QR code provided on the screen or in their materials to register quickly and easily.
- **Fun Videos:** You are not expected to show this video. However, if you need to fill time, feel free to click play. The video is just under 2 minutes.





NABA

Slide 33-35



Discussion Guide:



Similar to the INCPAS student membership slides, now you'll introduce the students to ALPFA and NABA. They have incredible resources for high school students.

- NABA: This membership organization also has high school and college student programming. In the volunteer training, we mention the ACAP program. This is a weeklong residency program for high school students to learn more about opportunities in accounting and business. You should encourage them to follow NABA on social to learn more about upcoming opportunities.
- **ACAP:** We've included flyers for ACAP in the materials that were sent to the teacher. ACAP is a weeklong accounting and business camp held in the summer.
- **Student Membership:** NABA now offers a free student membership with benefits like access to educational offerings, scholarships and more. By joining, it's a great way to stay up-to-date on programs and events in the area.



SPONSORS & CONNECT

Slide 36-31



Discussion Guide:



To conclude the presentation, you'll share a thank you to the Society's Pipeline Partners who make CPA Week possible. The last slide offers ways students can connect with INCPAS.

This is a great opportunity to share your contact information with them (if you want).



WANT TO LEARN MORE?

The Indiana CPA Society and the Indiana CPA Educational Foundation partnered with the Center for Audit Quality to support Accounting+. Accounting+ helps students discover the vast opportunities in the accounting field.



ACCOUNTING+

- joinaccountingplus.com
- accounting.plus
- o acct.plus

Education: What does going to school for accounting look like? Is it hard? Is it all math (no!!)? See what it's like for accounting students and find scholarships!

Lifestyle: Travel the world as an accountant. It's true, that there are countless travel opportunities for accountants. No matter the kind of work you're passionate about or the industry you want to work in, you can find a job that helps you see the world.

Career: There are many ways to be an accountant. You can own your own business, support your local community, or work in any industry that matches your passion. And because there are so many different ways to be an accountant, you can count on every day being different.