



Meeting Minutes - October 13, 2020

Mid Tier Panel 2

Call to Order: A UAS general meeting was held on October 13, 2020 at 6:30. This meeting was held virtually, on Zoom.

Attendees:

1. Executive Board: All present.
2. Invitees:
 - a. Jenny Yu, Novogradac
 - b. Laura Ross, EisnerAmper
 - c. Meaghan O'Donnell, HCVT
 - d. Ricardo Soria, Frank Rimerman
 - e. Hayley Peltz, CBIZ

Meeting Notes:

- 1) How do you stick out as a freshman?
 - a) Meaghan: Coming to different events like these are always helpful! Getting to meet our professionals is a good way to get on our radar for the future.
 - b) Ricardo: Getting involved with UAS is the best way to start. Utilize older students who have gone through recruiting processes.
 - c) Hayley: Going to events is one of the best things you can do. Every little piece of information you learn will help you learn more about public accounting.
 - d) Jenny: I agree 100%. It's never too early to attend events! The earlier you start, the most people you can connect with! Make a LinkedIn, don't wait to do so because you can always connect with professionals that you meet at events.
 - e) Laura: I agree with everything that was stated. Coming to these events will really help your chances. The more people know you, the more likely you can get a slot at our leadership program!
- 2) How do rotational internships work (for firms that do them)?
 - a) Hayley: We encourage students to give everything a try. You never know what you like before you are able to try it. We want students to come in with an open mind.
 - b) Ricardo: We have an 8-week program. Students spend time in audit, tax, and CFO advising departments. You will be able to work with associates, managers, and even partners! Open-mindedness is key during our internships. We want to give you exposure to each of our different service lines.



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- c) Laura: We tend to have students stay within one department now. In San Francisco, you might be able to. Usually we assign students to a group, especially since internships are so short. We try to be flexible depending on students' desires!
 - d) Meaghan: We don't offer rotational internships. We want to give students a more in-depth look into one service line.
 - e) Jenny: We offer winter internships and do offer rotational internships.
- 3) What differentiates your firm from significantly larger and significantly smaller ones?
- a) Meaghan: You will have the chance to know everyone. Upper management is much more approachable than the biggest firms. Our clients are also different from those of the smallest firms. We have a large array of industries and types of clients.
 - b) Ricardo: A large misconception is that it is harder to find exit opportunities. You will not struggle to find new opportunities once you have your CPA license. We work a lot of startup and private equity-backed companies. At a firm of our size, you will have much more exposure to different industries and specializations for longer.
 - c) Laura: At a firm of our size, we have more exposure to the entire process. You aren't limited to looking at one tiny piece of a client but have the ability to see the whole process.
 - d) Jenny: You get the chance to understand the whole process and what each part means. Our teams are smaller, you could truly get to know a group of people that you are learning and growing with.
 - e) Hayley: Mid tier firms are more close knit. You are able to meet more of the office rather than just a smaller subset of them. You aren't required to decide your specializations as fast. You may even have more opportunities and are recognized for your contributions. We have unique training opportunities that may be at the national or local levels that allow you to network with those outside of your home office. We have a lot of resources but still have a personalized touch as well.
- 4) When are your firms recruiting for SLPs or other sophomore positions?
- a) Meaghan: You can start applying in December/January on Handshake and Lever. Check out our website for a great video explaining more about our SLP!

Adjournment:

Kevin Tam adjourned the meeting and students were allowed to meet our panelists in breakout rooms.



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Confirmed by:

Logan Sy

10/13/2020

Logan Sy
Internal Vice President, Undergraduate Accounting Society
2020-2021

Date