

# CPAs prioritize public service

By Colleen Smith, the WICPA

**S**cott R. Haumersen, CPA, wanted to be a social worker before he realized that the CPA profession would be a better match for his personal financial goals. As managing partner at Wegner, LLP in Madison he's found a way to practice his service values.

"It's my personal belief that you get back far more than you give," Haumersen says. "You can't look at payback in terms of dollars and cents. The community you live in is better because of the things you do. Invariably, that's good for business."

"We have talents that organizations need," says **Andy Holman, CPA**, partner at Ritz, Holman, Butala, Fine LLP in Milwaukee. "It isn't just enough to offer business services. We feel that as a member of the greater Milwaukee community we have to give back."

Holman points to the slogan: "Never underestimate the value of a CPA" and parallels it to public service. "Never underestimate the value of what we can do for our community," he says.

**John Couper, CPA, CFO** at Charter Manufacturing in Mequon, says public service is an informal part of Charter's culture. "We know we're not an island unto our own," he says. "We live in these communities; we don't want to isolate ourselves."

Couper also realizes that public service has limits. "Our objective is to be a profitable business, to provide jobs to our employees, not necessarily to be a star in our community," he says.



Donna Howland, clerical staff, and Jill Newman, CPA, supervisor, both of Ritz, Holman, Butala, Fine in Milwaukee, participate in the Literacy Program at Cass Street School in Milwaukee.

## GIVING BENEFITS BUSINESS

President Bush launched the program Business Strengthening America in December 2002. A year later, more than 700 businesses representing more than 5 million people have committed to at least two years of service to others during their lifetimes.

Besides offering service to communities, volunteering also benefits business. A 2003 survey of Business Strengthening America participants found that key benefits to business include a positive image in the local community, increased employee morale and a feeling of pride.

"Regardless of the motivation of giving, it's really good for the community and great for business," says Haumersen. "As a profession we enjoy a high degree of respect. The

more we do by serving on boards and volunteering in the community, the more we elevate our profession."

## MAKING TIME FOR SERVICE

Wegner helps employees prioritize public service through its Volunteer Matching Program. The firm matches or pays employees, up to 24 hours, for their volunteer activity related to financial services. Services may include setting up the books or helping reconcile financials for a nonprofit organization. So far, employees have donated nearly 300 hours.

"About one-third of our clients are not-for-profit organizations," says Haumersen. "We recruit and attract people who want to work with nonprofits. They are naturally altruistic. Service is not something you have to encourage a lot here."

Wegner encourages staff to serve on nonprofit boards and has organized projects that include participation in paint-a-thons and bowl-a-thons. While the firm doesn't require service participation, it is discussed at performance reviews and included in the firm's value statement.

Every Ritz, Holman, Butala, Fine employee is encouraged to perform public service, says Holman. The firm has helped with the AIDS Walk, Volunteer Income Tax Assistance, Junior Achievement, Komen Breast Cancer Walk and Bottomless Closet, among other activities. Employees also serve on nonprofit boards.

"Staff often take it upon themselves to champion certain causes," Holman says. "Our firm has a longstanding tradition of giving back which goes back 45 years to the founding of the firm by Nathan Holman and Maurice Ritz."


Charter tries to make giving fun. United Way is a major focus among Charter's four divisions, with each division setting its own goals and finding creative ways to meet them. "One of our employees had his head shaved as a result of a promise he made if the division met its goal," Couper

says. The company also participates in United Way's Day of Caring.

Couper says Charter is involved in a business coalition designed to curb rising health care costs. "Health care is



Scott Haumersen, CPA, managing partner at Wegner, LLP in Madison, participates in the Dane County Paint-A-Thon.

bigger than us, bigger than southeastern Wisconsin," he says. "A good way to deal with it is to communicate, to break down barriers, to come up with solutions." 



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