

# From Technician to Trailblazer

Reimagining the Role of Accounting & Finance Leaders

With Terrell A. Turner, CPA



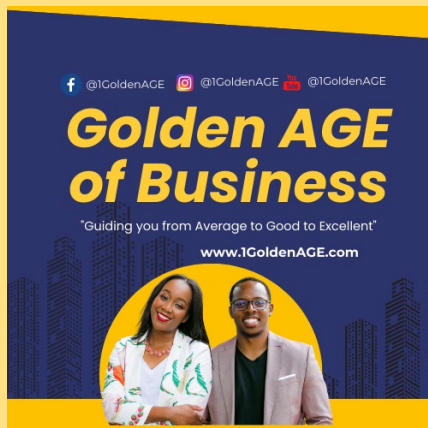
# Why This Is Important

- ❑ Success requires a different approach
- ❑ Professional expectations are changing
- ❑ Our clients desperately need us

# The TLTurner Group

Terrell A. Turner, CPA

*Founder & CEO*



- Husband, Son, Uncle, Friend
- 2x Top Global Finance Leader
- 3x 40 under 40 CPA
- Speaker & Content Creator



**TLTurner Group  
Founder & Partner**



**Passport  
Director of FP&A**



**General Electric  
Sr. Finance Manager**

**Navistar  
IR Analyst/Acct. Manager**

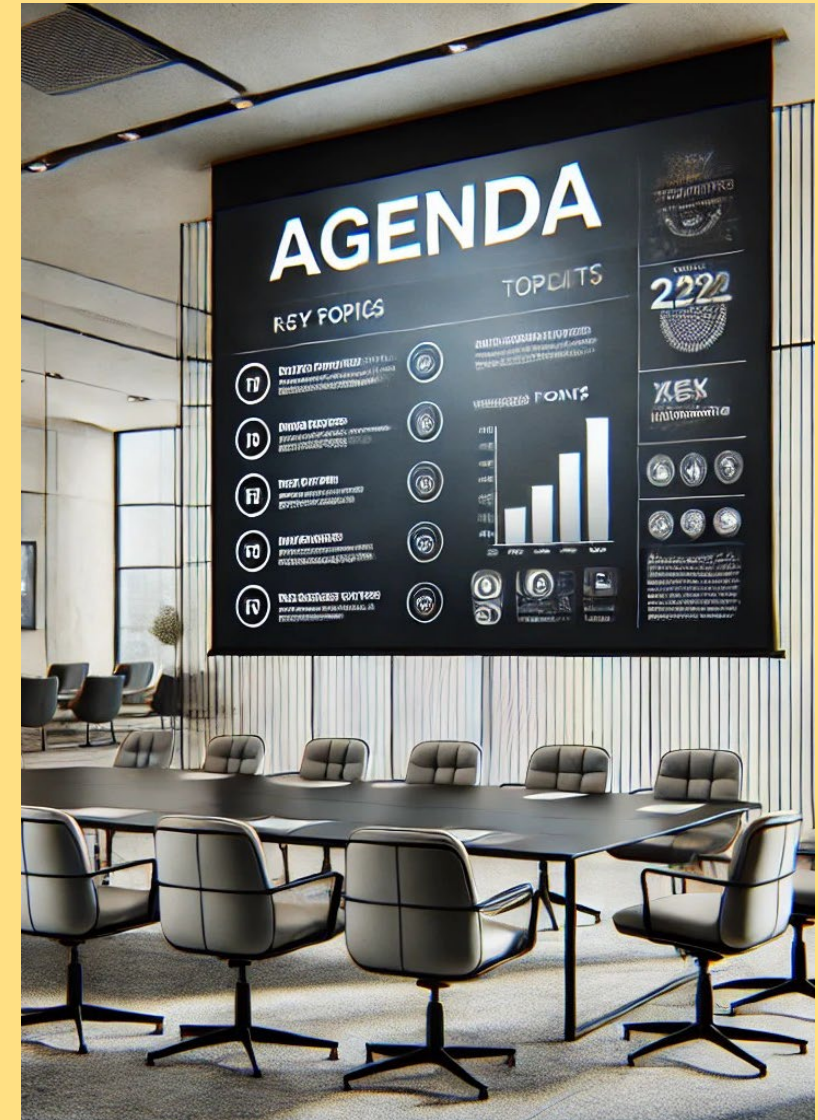


**Senior Auditor  
Ernst & Young**



# Learning Objectives

- Understand the forces reshaping our profession
- Learn How to shift from reactive support to Proactive Leadership
- Build a Personal Strategy for Navigating Change



# WHAT'S CHANGING IN ACCOUNTING



REGULATIONS



ECONOMY



ECONOMIC  
GENERATION



TECHNOLOGY

# What is Changing

- Regulations
- National Economy
- Economic Generation
- Technology

# Major Changes

<b>Change</b>	<b>Effect</b>
<b>Regulation</b>	<b>Increasing complexity</b>
<b>National Economics</b>	<b>Increasing financial pressure</b>
<b>Economic Generation</b>	<b>Shifting the value perspective</b>
<b>Technology</b>	<b>Commoditization &amp; Scalability</b>



# The Shift

Perspective of our profession

Perspective of our opportunity

Perspective of our risk

Perspective of our resources

# Making the Shift

Process	Reactive	Proactive
Internal Audit	Audit the past	Process Phishing audit

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<b>Payment Processing</b>	<b>Wait and see approach</b>	<b>Hypothetical testing</b>

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Payment Processing	Wait and see approach	Hypothetical testing
<b>SALT impact</b>	<b>Post transaction analysis</b>	<b>Forecasting decision tool</b>

# Making the Shift

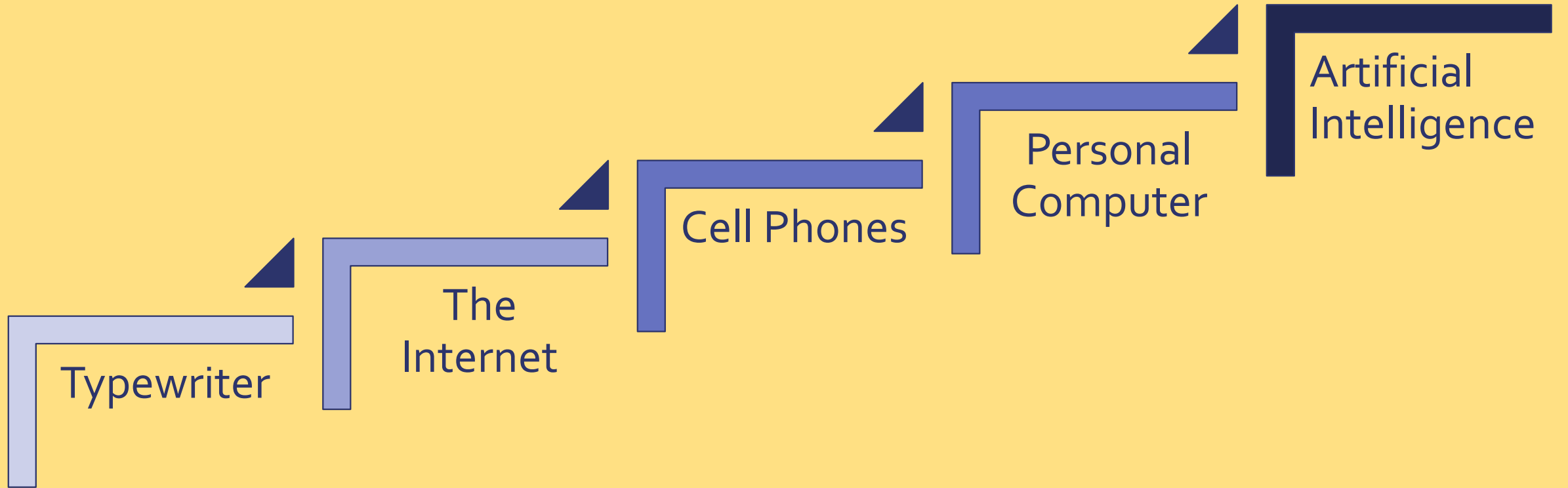
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Internal Audit	Audit the past	Process Phishing audit
Payment Processing	Wait and see approach	Hypothetical testing
SALT impact	Post transaction analysis	Forecasting decision tool
<b>Economic Changes</b>	<b>React to market changes</b>	<b>Scenario Forecasting</b>

# Personal Change Requires

- Your Perspective
- Change will continue
- Change is a journey
- Patience for the process



# Technology Adoption



40 years

25 years

20 Years

15 years

3 years

# Typewriters (~40 yrs)

- “Why use a machine when you can write faster by hand?”
- “It’s too noisy and clumsy for an office.”
- “No respectable businessman would trust a letter that wasn’t handwritten.”



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## Internet (~25 yrs)

- “It’s a fad a playground for geeks.”
- “Who would ever want to talk to strangers online?”
- “Why would I need a website I can just fax someone”

# Cell Phone (~20 yrs)

- Who needs to talk on the phone while walking.
- Its just a status symbol, not a necessity
- It's hard to imagine mobile phones ever being as common as wristwatches.

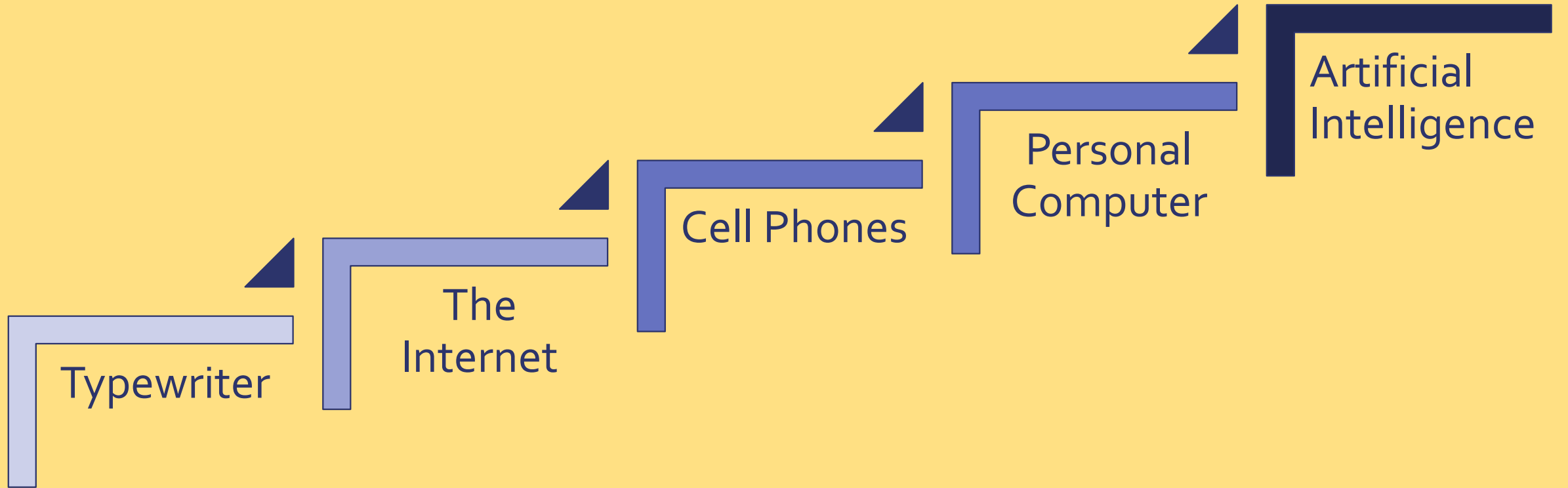




## Personal Computer (~15 yrs)

- “Why would anyone need a computer at home.”
- “Computers are only for scientist and not ordinary people”
- “We already have typewriters and calculators”

# Technology Adoption



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# Personal Change Strategy

- Understand history
- Stay curious
- Make space to be strategic
- Stay connected





# Making Space

- Say no to clients
- Delegate work assignments
- Optimize processes
- Leverage tools

# AI Agent Resource

SCAN TO ACCESS THE AI AGENT RESOURCE



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**Questions?**

# Contact Us



## Let's Connect!



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