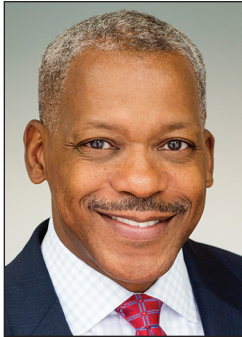




Creating Opportunity for Our Profession

Mentoring and Giving Back

An Interview with Julius Green, Partner, Baker Tilly



Julius Green

EDITORS' NOTE *With 30 years of experience working with tax-exempt organizations, Julius Green provides consultation on tax compliance and consulting matters for not-for-profit, healthcare, senior living, higher education, membership organizations and private foundation clients. Julius is a member of Baker Tilly's Board of Partners and is a past-president of the Pennsylvania Institute of Certified Public Accountants (PICPA).*

FIRM BRIEF *Baker Tilly Virchow Krause, LLP (bakertilly.com) is a nationally recognized, full-service accounting and advisory firm whose specialized professionals connect with clients and their businesses through refreshing candor and clear industry insight. With approximately 2,700 employees across the United States, Baker Tilly is ranked as one of the 15 largest accounting and advisory firms in the country. Headquartered in Chicago, Baker Tilly is an independent member of Baker Tilly International, a worldwide network of independent accounting and business advisory firms in 147 countries, with 30,000 professionals.*

How do you differentiate in the tax-exempt space when services can seem so similar?

We differentiate in our role as Valued Business Advisors. It's somewhat misleading to call organizations tax-exempt because there are all kinds of tax considerations that affect their business. We help our clients understand these complexities – certainly from a compliance position but also from a strategic vantage point.

Baker Tilly stands out by bringing solutions to our clients even before they realize they need them. The Affordable Care Act is a great example. There is a provision requiring tax-exempt hospitals to perform a Community Health Needs Assessment (CHNA) every three years – a very big undertaking. We brought together our specialists in public health, tax, finance, healthcare big data analytics and strategic planning to create a comprehensive CHNA approach. We have a ready-made solution that can be adapted for hospitals and healthcare systems.

What role does mentorship play in the accounting and advisory profession?

Mentorship is particularly important in accounting and advisory where there is a high degree of technical and business acumen. Mentorship elevates rising stars and teaches skills that aren't covered in college classes. It spotlights team members who may not otherwise raise their hands or have been sought out for new projects or stretch assignments.

During the year I mentor 20 to 30 young people inside and outside Baker Tilly – these are high schoolers, a college kids and young professionals just a few years into their careers. It can be as simple as reviewing a resume, making an introduction or having regular touch base meetings. It feels great helping someone along the way who will pay it forward.

You championed diversity at the PICPA and continue to do so today. What is the importance of diversity in the accounting profession?

I launched PICPA's diversity initiative and led the committee for several years before joining its board of directors. In many respects, the PICPA was ahead of the industry on this topic. Diversity in accounting is critically important. There has been some progress over the years, but the gains have been slow to take hold. This is something the AICPA acknowledges and continues to address.

Diversity and inclusion enables companies to maximize the unique insights of each team member. This is far easier to accomplish when one works with colleagues who have different experiences, backgrounds and perspectives. I am confident Baker Tilly will play an instrumental role in moving diversity and inclusion forward for our profession.

You've been very involved in the profession in leadership roles. What advice do you have for others who are thinking about getting more involved?

My advice is to jump in with both feet! I've had such a rewarding career in accounting that I feel it is incumbent on me to give back to my profession. Not only that, my involvement has helped me grow as a professional and as a leader.

At Baker Tilly, we encourage our practitioners to get involved. It's an important way to shape the future of our profession while developing our leaders. Our partners currently hold 24 AICPA committee appointments and have recently held the top leadership positions of three state CPA societies. Our CEO Alan Whitman chairs the AICPA Political Action Committee and Regional Managing Partner Jeff Ferro serves on the AICPA Council. ●