



aligned
cpa, llc

introducing our

CULTURE GUIDE





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A Message From Joy

Aligned CPA's Owner/Founder

Congratulations on your interest in Aligned CPA. I am glad you're here. I hope that this guide will help you understand what we believe in as an organization and how we live that vision everyday.



As the founder of Aligned, I feel strongly about our mission to not only help business owners succeed but to help them thrive. With the right team, processes in place, and dedication to the quality of our work, we can truly make a difference for our clients.

My goal is to build a team that loves coming to work, wants to make a difference, and believes in our core values. This is what creates a great culture! I also believe it is my job to foster your growth, professionally and personally, and to help you reach your own goals.

Here's to our future success together!

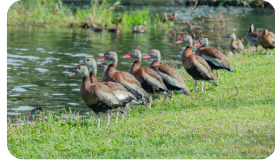
Joy L. Lutz, CPA

Aligned CPA

OUR HISTORY

2011

Joy officially became a Certified Public Accountant and started working toward her goal of opening her own firm.



2012

Lizotte CPA opened for business in Westfield Square in a one room office.



2016

With the purchase of a new building, Lizotte CPA moved into a larger office and hired additional staff.



2018

The year of our official name change. Goodbye Lizotte CPA and hello Aligned CPA.



2023

A year of growth with a new office, service line and an increase of staff to 7 employees!



introduction of _____

OUR TEAM



JOY LUTZ, CPA
Founder



Cessie Cothran
Director of Advisory



Kathryn Norris
Client Manager



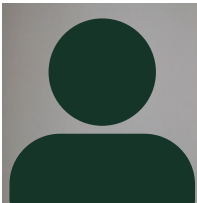
BARBARA LEWIS
Staff Accountant



**MICHELLE
LENEAVE**
Staff Accountant



Owen Lutz
Office Manager



**THIS COULD
BE YOU!**



JORDAN REGAR
*Business
Development*



CORE VALUES

CONTINUOUS LEARNING

We believe in developing our skill set
and striving to always learn

DO WHAT WE SAY

We believe in following through and
doing as we say we will

DO THE RIGHT THING

We believe in always doing the right
thing, even when it's not easy

OUR SUCCESS IS YOUR SUCCESS

We believe our success comes from
helping others succeed

COMMITMENT TO COMMUNITY

We believe it is our responsibility
to make this a better place to live

Living Our Values

Core Values represent our deeply held beliefs, our highest priorities, and the fundamental forces that drive our actions.

We use these values in our day-to-day work, dealing with clients, and choosing the right employees.

OUR STAFF'S POSITIVE TRAITS

Strong Follow Through
Growth Mindset
Emphasis on Teamwork
Excited to Come to Work
A Love of Learning
Kind & Empathetic

Expressions like
"Not my job"
aren't in our
vocabulary

CREATING MOMENTS THAT MATTER

Smile Before Answering the Phone
Respectfully Inform Clients
Use the Client's Name
Go Above & Beyond to Solve Client Issues
Update Voicemails for Out of Office Notifications
Be Respectful & Responsive, Always

We encourage our staff to find a way to "live" these values in every workday. We hold each other accountable!

So... how would you live these values?

ALIGNED

PRINCIPLES

We strongly believe in order to grow a successful business we must have strong management, with a great team, serving our ideal clients with the correct services.

Firm Management

- As we bring clients into our niche, we will let legacy clients go so our client base is continuously improving
- We deliver value to clients and that value produces a profit
- We will make decisions that move our firm forward towards reaching our goals
- We lead our clients. Our clients do not lead us
- There are endless opportunities and clients available for us
- It's the leader's duty to commit to and uphold these principles

Building A Team

- We believe in hiring A+ Team Players
- We believe our team delivers value to our clients and is committed to helping them succeed
- We believe in compensating team members for that value
- We believe in providing our team with the best resources
- We believe our team members must show up strong

ALIGNED

PRINCIPLES

Client Selection

- Our ideal client is a small business owner that sees value in the services we offer
- We provide tremendous value to our clients
- We believe that in order to reach our firm goals we must work with the right clients, at the right price, providing the right services
- We recognize that non-ideal clients negatively effect our employee's happiness, firm growth, and overall business success
- It is leadership's role to ensure we do not let non-ideal clients in our door, and if we do, to discontinue engagement

Client Services

- We believe that clients do not know what services to ask for and it is our job to guide them
- We believe that we are a valuable resource to our clients
- We must take the time to discuss tax planning opportunities with our clients
- Our services are delivered on time or in advance
- We recognize and address when a client is out of scope on the services we were hired to do

We strongly believe in order to grow a successful business we must have strong management, with a great team, serving our ideal clients with the correct services.

In Our Community

As a team, we choose a charitable event to participate in each quarter. Focusing our efforts on drives & fundraisers that locally enhance our community.



We also place great importance on the power of team building; from retreats and staff lunches to supporting local businesses on evenings out.

Aligned CPA, *Your Future Employer*

— “ —————

The strength of the team is each individual member. The strength of each member is the team.

- Phil Jackson

————— ” —

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