



# The Playbook

for Paying Your Way through College  
as a Bookkeeping Professional



**Mariette Martinez, EA**

*Small Business Financial Advisor &  
Retirement Income Strategist*

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# My Short Story

**Elevator Pitch:** I am a financial services professional and specialize in accounting technologies for small businesses. I also provide strategic financial & retirement planning to business owners and individuals. I am a #Mommypreneur and chose a career in accounting so that I could work virtually from anywhere and raise a family.

**Short History Lesson:** I graduated from Cal State Northridge in 2001 and I have worked in the public & private accounting sector for over 20 years. In 2007, I worked as technical support for a tax software company and that is where I discovered my love for technology. In 2010, I opened my own accounting and tax practice. I work 100% virtually with all my clients. I have been using and teaching QuickBooks for over 15 years.

**My Blended Life:** I am a busy mom of 3 kids all under 11 & happily married for 17 years. I start every morning with the goal to make a positive difference in someone's day. I use #SocialMedia to change as many lives as possible.

***Friend me on Facebook or Tweet me on Twitter!***

Twitter: [@MMartinezEA](#) OR Facebook: [marietteinthecloud](#)

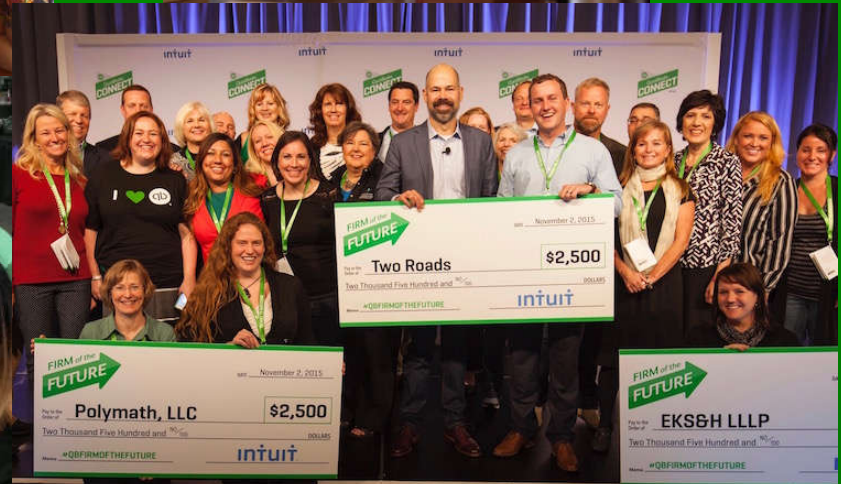
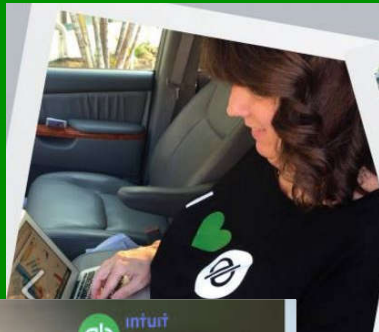


**2016 Most Powerful Women in Accounting**

## What are we covering

- ✓ **Who are Bookkeeping Professionals?**  
What do they do? Who do they work for? Who do they work with?
- ✓ **How do you become a bookkeeping professional?**  
What does it take to work in this profession? What skillset is required?
- ✓ **How can you get a job as a bookkeeping professional in high school or college?**  
Is this a career path you can start working in now?
- ✓ **What other doors open up as a bookkeeping professional?**  
Are there other careers I can consider in this line of work?
- ✓ **What comes next?**  
Start your research, take some classes, find your peeps, build relationships & **connect**

# Who are Bookkeeping Professionals?



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## Who are Bookkeeping Professionals ?

### What do they do?

- ✓ Financial recordkeepers
- ✓ Keep track of money coming in and going out of a business
- ✓ Use technology to maintain financial data and records for a business

### Who do they work for?

- ✓ They can work for a large company in the accounting department
- ✓ They can work for a small company and be the accounting manager
- ✓ They can work for THEMSELVES & provide accounting services to clients

### Who do they work with?

- ✓ EVERY business NEEDS a bookkeeping professional







How do I become a bookkeeping professional?

What skills do I need?

# What skills qualify you as a Bookkeeping Professional ?

## Enjoy working with Numbers – **Your Bookkeeping Skills**

- ✓ Feel comfortable with math, calculators and solving problems
- ✓ Understand how “CASH” MONEY comes in and goes out of a business
- ✓ Write, read and explain reports that tell the Numbers story – these are called Financial Statements

## Enjoy speaking and writing professionally – **Your Communication Skills**

- ✓ Feel comfortable speaking with customers & vendors in a business environment
- ✓ Build strong writing skills for writing emails, reports & documenting your work
- ✓ Feel confident relaying “numbers” to the bosses

## Enjoy learning new technologies – **Your Nerdy Tech Skills**

- ✓ Computer savy and quick to learn new applications
- ✓ Ability to multi-task among multiple programs

## Enjoy working with different people in a busy & always changing environment – **Your Soft Skills**

- ✓ Organized and have attention to detail
- ✓ Willingness to be in a continuous learning environment
- ✓ Resourceful!! If you don't know it, then go research and find out!



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How can you get a job as a bookkeeper in high school or college?

### Start at Home and School

- ✓ Do you know someone that owns a business?
- ✓ Do your parents run a family business?
- ✓ Do you know any accountants that can hire you as an intern during the summer?
- ✓ Visit the accounting department at school and ask the professors

### Job hunt during busy season and tax season

- ✓ Accountants have a “busy season” which is a great time to ask if they are looking for extra help – starts in October and goes through April
- ✓ Working in a tax office will allow you to get close to the numbers
- ✓ Research job listings for “beginner data entry” which will start you slowly and develop your bookkeeping skills





What other doors can open up for you  
as an expert in the accounting field?



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# The SKY is the Limit...



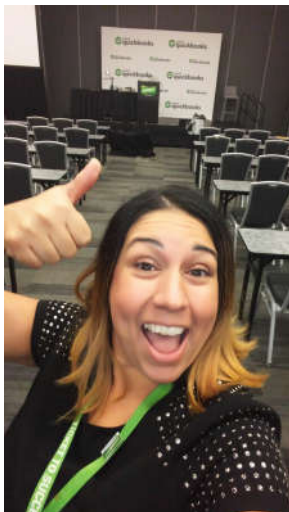
**Mariette F. Martinez**  
Contributor - Head Over Heels for Solo-Entrepreneurs

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Mariette F. Martinez, EA

Mariette F. Martinez is a Small Business Accounting Consultant and Tax Professional w Mariette is a Mom, first and foremost, and was born into a family of entrepreneurs. Her fueled her deep passion to embrace, engage and help the small business community. companies to teach & develop complete and cost-efficient accounting technology w







**I'm IN! Whats's Next?**

Resources are magical – They are people, places & things!

## EDUCATE

- Accounting courses
- SBA.gov
- Score.org
- IRS.gov
- Intuit Accountant University
- [BetweenWallandMain](#)
- Accounting Blogs

## LISTEN&LEARN

- CPA Academy
- Virtual conferences
- Live webinars
- Recorded webinars
- Podcasts
- “Useful” YouTube channels

## CONNECT

- FB prof groups
- LinkedIn groups
- Weekly Zoom meetings
- Local networking events/meetups
- Live conferences
- Road shows
- Professional organizations events
- **Adelante Mujeres event!!**



Tip: Keep your resources organized, and keep your connections engaged.

# Questions?

Where can I [download this?](#)



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