

Washington Business Journal

<https://www.bizjournals.com/washington/news/2022/03/11/dc-accountants-beat-stress-tax-season.html>

Here's how D.C.-area accountants beat the stress of tax season

By [Carolyn M. Proctor](#) – Data Editor, Washington Business Journal
Mar 11, 2022

Just the thought of doing your taxes might cause you stress — but imagine how your accountant feels.

Scratch that, you don't have to imagine, because there is research on this. CABA, a U.K.-based nonprofit focused on the well-being of accountants, found in a 2019 survey that just 2% of accountants felt unaffected by stress, and one-third felt stressed every day — and this was before the pandemic. It is an inherently stressful profession, which makes it all the more important to find support and best practices for staying mentally healthy, particularly after a global health crisis that tested us all.

Last November, The Journal of Accountancy put out a guide for employers on supporting the mental health of their CPAs, with an emphasis on identifying employees and colleagues in distress, and what to do about it.

Signs of potential mental distress:

- Someone previously talkative becomes mostly quiet
- Someone quiet gets even quieter
- Someone previously well dressed all the time appears disheveled

Things that can cause any accountant stress:

- The pandemic, obviously
- It is tax season or year-end
- Studying for the CPA exam
- Going through a career transition

How to talk to your stressed-out accountant:

- Meet privately, somewhere quiet.
- Be respectful, calm and nonjudgmental.
- Share your observations that caused you concern, focusing on specific behaviors you noticed.
- Give them a chance to discuss their feelings if they feel comfortable.
- Listen to understand but not to agree or disagree.
- Try to normalize their situation, tell them they're not alone, share a personal story that could help them feel safer sharing their own challenges.
- If appropriate, encourage them to make an appointment with a mental health professional.
- Make sure not to minimize their fears or concerns, and refrain from using platitudes.
- Don't try to solve all their problems or get more involved than you're comfortable with.
- Don't ignore suicidal behaviors or admissions to feeling suicidal — call a suicide prevention hotline and try to get them to a mental health counselor immediately.

How they do it

Accountants in Greater Washington seem to have a pretty good handle on how to maintain balance during the heaviest stress season. We're in the thick of it right now.

We asked them to tell us more about what they do personally, and what their firms do to support their mental health. Here are the kinds of things recommended by 10 responding firms in the region:

Down time

Sometimes you need to force people to take a break and recharge! At **Marcum LLP's Washington office**, Partner **Julie Jones** said regular happy hours are essential, even when remote. During Covid, this included activities like virtual disco bingo, photo scavenger hunts and a cocktail-making class. Regular fitness classes are another popular option, embraced at Matthews, Carter & Boyce in Fairfax. **Pam Priester**, MCB's director of people strategy, mentioned weekly fitness and yoga classes held over Zoom. At RMA Associates in Arlington, sometimes a team shopping outing is a fun diversion. At SC&H Group Inc., massages and meditation sessions help keep workers feeling as relaxed as possible.

Snacks!

Free food remains as popular as ever. Plenty of firms mentioned staff lunches, dinners and potlucks. At Marcum, the local office also sent snack boxes home to associates working remotely during Covid — with an extra side of hand sanitizer, stress balls, Emergen-C, tissues and handwritten thank-you notes. MCB Manager [John Ham](#) likes cooking for his in-office team on occasion, but that's not the only meal perk, as the team has also had cooking classes and tastings — and a weekly meal reimbursement for folks working remotely. SC&H sometimes pays for family meals, seeing as how the workload can cut into family time during busy season.

Appreciation

Recognizing your star performers not only keeps them feeling appreciated for their hard work, it also shows the whole team that it doesn't go unnoticed. At Marcum, Jones mentioned "Caught in the Act" awards given out to associates going above and beyond, in addition to Power Points recognizing employees with compliments given about them by their co-workers. Caldwell CPAs in Bethesda gave every staff member a "sizable thank you bonus" this February, as recognition for good work over a rough past two years. It's also tradition for CEO [William Caldwell](#) to write each staff member a personal thank-you note after each tax season, closing the office for a day and offering everyone a little extra spending money to enjoy it.

Entertainment

Sometimes a diversion is what's needed. It could take the form of Fantasy Football or a March Madness contest, or a trivia night or virtual comedy show over Zoom. Cordia Partners in Vienna has taken staff out to Washington Capitals games. At Marcum's D.C. office, pet photo contests have been popular. MCB also makes a pretty big deal out of the March 15 and April 22 tax deadlines, sending surprise gifts to employee homes and holding a special celebration at the end of the season, most recently at a local country club.

Flexibility

This is a big one, providing staff extra flexibility with their hourly schedule, and their work-from-home time, in order to be most productive while keeping as much work-life balance as they can. [Martin Fiore](#), the U.S.-East regional tax leader for EY, said his team members are encouraged to map schedules around stepping away for personal activities to recharge during the busy season. At Rockville-based Aronson LLC, an extra firmwide day off can be taken after tax season to recover, and a "Flexibility First" initiative means workers can choose where they work. Sometimes it's equally important to give employees the space needed to focus on a task, which is why SC&H started "focused Fridays," free from any interruption of meetings or calls.

Tips from the pros

Some extra wisdom that our local accounting leaders find helps them manage their stressed employees better – as well as their own work.:

“At work, I do my job one task at a time to avoid getting overwhelmed. I dedicate the needed focus to each of my tasks one by one. I also focus on staying organized and keeping my email in-box clean every night – it’s a form of decluttering that I strive to achieve by the evening.”

– [Reza Mahbod](#), president, RMA Associates



Enlarge

Reza Mahbod, president of RMA Associates LLC, based in Arlington
S.C. LASKEY

“I make it a point to work out every day. This provides an enjoyable way to relieve stress and provides me with additional motivation during our busy season.”

— [Martin Fiore](#), EY’s U.S.-East regional tax leader

“I strive for sufficient sleep, and drink lots of water, as staying hydrated helps with energy level. I also pray and keep a journal to help maintain perspective.”

— [Pam Priester](#), director of people strategy, Matthews, Carter & Boyce

“Show appreciation for your employees by thanking them with gifts and rewards that are unique to them and not a cookie-cutter approach.”

— [Mitch Weintraub](#), managing partner, Cordia Partners



Enlarge

Mitch Weintraub, managing partner at Cordia Partners

CORDIA PARTNERS

“I believe teams would see significant returns if they continually prompt their team to focus on their overall health and wellness — during busy season and throughout the entire year. Even small things like taking walks, going to the gym, meditating, journaling and completely unplugging on the weekends are practices that help individuals unwind, recover, stay engaged, and prevent burnout.”

— [Jim Wilhelm](#), director of tax services, SC&H Group Inc.

“Little things like offering later start times, remote work opportunities and understanding that people are human beings, with human needs, go a long way.”

— [Lisa Curtin](#), COO, Caldwell CPAs



Enlarge

Lisa Curtin, COO at Caldwell CPAs in Bethesda
CALDWELL CPAS

Largest Accounting Firms in Greater D.C.

Ranked by Metro-area professionals

Rank	Firm	Metro-Area Professionals
1	Deloitte	13,949
2	Ernst & Young LLP	4,216
3	KPMG LLP	3,060