

Leading Women: SANDY McILVAIN AND HER ASSOCIATES



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Twenty years ago when Sandy McIlvain opened her accounting firm, she established a mission statement from which she has never wavered: To serve clients and the community with integrity and care. As owner of McIlvain & Associates in Colleyville, Sandy personally visited with each new client in those early years. She soon realized that they were searching for special attention from their CPA professionals. “It was apparent to me that they wanted the simple things such as phone calls returned promptly, or a consistent accountant to talk to each time they called,” she said. “People just wanted to feel comfortable when they called to ask questions, and our approach has been to faithfully meet those needs.”

While a client might be assigned to a particular staff member, the McIlvain & Associates staff is cross-trained to promote efficient and thorough service to each client. If their personal accountant happens to be away when assistance is needed, a backup professional is there to help.

When phoning McIlvain & Associates, you will likely speak with Janine Castleberry, office and business development manager. “Changing to a new CPA firm can be stressful,” she said, “but we make that transition as smooth as possible. Many new clients comment on how welcoming our office is.” Perhaps it’s the fresh flowers on the front desk, the offered soft drink or coffee, or maybe it’s the warm smiles of the staff that make the clients feel at ease.

The McIlvain & Associates office is open all year round. Phone calls are returned within 24 hours and questions are always welcome. “Some of our clients are physicians,” Sandy said, then laughingly added: “We don’t know how to do heart surgery, and we don’t expect them to know accounting.”

FINDING A WAY TO SERVE YOU BEST

While some accounting firms might expect clients to fit their plans, McIlvain & Associates lead the way with custom design services to fit individual needs. Some clients want someone on site once a week to handle their accounting, while others prefer transferring

information through a secure Internet site. Several clients provide remote access to their in-house system. During a free 30-minute consulting session, the McIlvain staff works with the client to determine what works best for them.

Sandy has earned the Advanced Certified Pro-Advisor distinction from QuickBooks accounting software systems. The McIlvain staff is experienced in QuickBooks and can train a client's employees on the program, teach business owners how to personalize the program to their needs and often set up the system for clients. Additionally, if someone gets behind in their bookkeeping and accounting, the McIlvain staff can help them catch up and be better organized, no matter what software is used. "Our goal is to help our clients understand their accounting, simplify it for them and produce returns with the greatest benefit to them," Sandy said.

Some clients have an onsite bookkeeper but call on McIlvain & Associates to advise on more complicated matters such as taxes and equipment depreciation. Even if the client prefers not to do any of the accounting themselves, Sandy wants to make sure they stay informed. "We can serve our clients best with an ongoing relationship," she said. "With tax projections and reviews, done at least quarterly, our clients are better able to plan for the future and make their business more profitable because their goal setting and budgets are based on current and accurate information."

COMMITTED TO PEOPLE, COMMITTED TO THE COMMUNITY

McIlvain & Associates is committed to the clients and the community it serves. Associates are involved in many chamber of commerce events, area churches, civic organizations and various volunteer activities. The firm also sponsors its own team each September in the NOCC (National Ovarian Cancer Coalition) "Walk to Break the Silence," honoring staff member, Elaine Hildebrand as an ovarian cancer survivor. You can spot the team by their brightly colored T-shirts, which state: "Team McIlvain Walks for Elaine!"

Newsletters featuring timely articles keep clients regularly informed but also show pictures of the staff on various vehicles with the caption always stating: "McIlvain & Associates...Driving Your Accounting Problems Away!" It's clear that this accounting firm is not afraid to 'think outside the box' and, while they are very serious about the level of service they provide, they do not want to take themselves too seriously.

HERE'S WHAT THEIR CLIENTS HAVE TO SAY

Their Web site (McIlvain.net) features audio testimonials from some of their very satisfied clients. Sean Cerone, D.D.S. of Southlake, complimented McIlvain & Associates on their responsiveness to calls and e-mails (usually the same day) and finds them to be, "extremely knowledgeable in both business and personal



Reasons to call the leading women at McIlvain & Associates today:

Free 30-minute consultation

Financial goal planning

QuickBooks Pros and other software expertise

Remote accounting services

Professional, prompt communication

Team approach means better support

Confidential handling of all documents

Year-round tax support and planning

tax rules and regulations." Animal Emergency Clinic, who recently relocated their clinic to 114 in Southlake, has been doing business with McIlvain for over 10 years. Kim, the clinic's office manager, finds them to be "...always extremely helpful and courteous. We are confident that if anything unforeseen occurs, they will be able to take care of it!" Rick Bradford, CEO of Sunflower Shoppe in Colleyville said, "The best decision for any small business is to choose McIlvain & Associates."

To view a complete list of services offered and to schedule your 30-minute free consultation, please visit their Web site (McIlvain.net) or simply give them a call. Their office is conveniently located near 121, between the intersections of Glade and Hall Johnson in Colleyville.

McIlvain & Associates CPA's

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