

# MEDIA KIT

## GROWING PEOPLE AND PRACTICES

Marketing & Branding • Internal & External Communications  
Business Development Support & Practice Management Strategies



Association for  
**Accounting  
Marketing**  
growing people and practices™

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TALK TO AN AAM MEMBER

# DISCOVER THE VALUE OF AAM

Being a professional marketer in the accounting industry is both challenging and rewarding. Whether you're part of a team or a department of one, access to other marketing professionals, industry best practices and career resources can help keep you on top of your game and relevant within your firm. The Association for Accounting Marketing ("AAM") offers marketers, business development professionals and affiliate business owners educational and networking opportunities to add value inside and outside their firms.

AAM's vast membership includes respected industry thought leaders and longtime practitioners with demonstrated expertise in the critical aspects of growth at their respective firms and throughout the industry. Our members specialize in the deployment of many other proven marketing and growth-oriented tactics that have helped move the needle.

## Our Mission

To promote excellence and elevate the professional stature of marketing, business development and other practice growth professionals at all career levels by directly impacting members' professional development and careers through education, networking and thought leadership to grow both people and accounting practices.



## YOUR MEDIA RELATIONS CONTACTS

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# VISION 2025

## AAM's Plan for Ongoing Success and Stability

Vision 2025, the strategic plan of the Association for Accounting Marketing, provides clarity and commitment to our members and their firms' growth and sustainability. By providing industry-leading networking, educational resources and thought leadership to fulfill our mission, AAM delivers unique value and collaboration not found elsewhere.

"Vision 2025 continues the efforts set forth in Vision 2020 to advance the accounting marketing profession and provide greater value to our members. AAM is stepping up its game to provide helpful content and thought leadership for members of every experience level, firm size, and specialization. Vision 2025 also brings members new ways connect with and learn from one another." says Becca Johns, AAM president and Director of Practice Growth at Rea & Associates, Inc.

With Vision 2025 we've actively and intentionally broadened our position beyond exclusively serving accounting marketers. The new vision focuses on our role as an association for all accounting industry professionals responsible for impacting their firm's growth and sustainability.

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### A Targeted Strategy

By focusing on the following priorities— growth, process, knowledge and positioning— we are aiming to:

- Engage with and satisfy new and current members
- Provide education on cutting-edge issues and trends
- Provide timely learning experiences to help members facilitate firm growth
- Develop products and services that provide guidance on industry issues
- Build key relationships throughout the accounting industry
- Create an operational infrastructure to meet our goals

#### POSITION

AAM delivers **targeted messaging** to communicate our value propositions to members, firms and supporting organizations.

#### KNOWLEDGE

AAM is the authority on CPA growth, providing **thought leadership** and process to key target markets.



#### GROWTH

AAM **generates revenue** to build financial sustainability and facilitate organizational growth.

#### PROCESS

AAM **streamlines operations** to facilitate goal-driven action plans and organizational

# OUR LEADERSHIP



## BECCA JOHNS

### President (2020-2021)

Director of Practice Growth

Rea & Associates, Inc.

becca.johns@reacpa.com

As director of practice growth, Becca oversees the marketing and practice growth efforts for Rea & Associates, a Top 100 firm. She focuses on building relationships with the firm's principals, helping them identify opportunities and providing them the tools they need to grow their practice and develop new offerings and solutions for their clients. She also oversees a team of 6 in guiding the firm's marketing, content and growth strategy. Becca joined Rea's practice

growth team in 2005, during the infancy of the firm's formalized marketing program. Today the firm has a robust and well-rounded marketing program that supports the firm's 300 professionals in 13 Ohio offices. Becca also helped the practice growth team win 16 Association for Accounting Marketing (AAM) Marketing Achievement awards. She joined AAM in 2005 and has been an active volunteer ever since. She has served on AAM's board since 2016.

Becca holds a bachelor's degree from Miami University. She is a 2016 graduate of Leadership Dublin and a 2017 graduate of Rea's NextGen leadership program's 40 Under 40.

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## KATIE BUTLER COHODES

### President-Elect (2020-2021)

Marketing Manager

Weinstein Spira

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Katie Butler Cohodes breathes innovation into each marketing project she develops at Weinstein Spira. She thrives at creating noise and amplifying the firm's strong foundation of success and relationships to the Greater Houston community. Clever and passionate, Katie excels at strategic planning, brand management and marketing education.



Katie came on board at Weinstein Spira in 2014 as the first marketing hire in the firm's history and is now their Marketing Manager. Prior to joining the firm, she gained invaluable experience working in Houston's energy start-up space and London's magazine publication niche. A proud Boilermaker, Katie is a graduate of Purdue University in West Lafayette, Indiana and majored in public relations.

In 2016, Katie was named Rookie of the Year by the Association for Accounting Marketing. "She focused on creating and fostering a marketing culture and leading a high-profile business development initiative. Due to her successful work, she has contributed to making record-breaking, upward-trending results a reality for her firm."

Outside of work, you can find Katie at one of Houston's foodie spots with her husband, Daniel, spending time with family and entertaining her golden retriever, Molly.



# Association For Accounting Marketing Provides Members With Tools, Relationships Designed To Build Future-Ready Firms

## Accounting Firms Nationwide Use Association's Exclusive Survey Data, Thought Leadership, Educational Resources to Thrive In Era of Disruption

FOR IMMEDIATE RELEASE

LEXINGTON, KY – The Association for Accounting Marketing (AAM), the leading trade association committed to providing educational opportunities and professional support for marketing and business development professionals in the accounting industry, continues to demonstrate its ability to provide firm leaders with the tools necessary to drive continued growth and profitability. As the accounting industry continues to evolve, and firm leaders seek new ways to provide value to their clients, firms of all sizes are turning to AAM for marketing and business development expertise.

"My membership in AAM has been absolutely instrumental in helping me to have the success I have had in my career," said Brian Falony, director of marketing at Brady Ware & Company. "When I was new to accounting marketing, through my membership in AAM, I was privileged to meet many of the leaders of our profession and they were more than willing to sit down with a 'newbie' and share their thoughts, ideas and experience and give me pointers on how I could become more effective in helping my firm grow."

In addition to providing members with access to a range of educational resources, including webinars, articles, whitepapers, templates and tools, the association publishes the exclusive Marketing Budget Benchmark Survey, which offers firm leaders a glimpse into how high-growth firms allocate their marketing budgets. Moreover, results from this survey are used to identify marketplace trends to help firms become more effective in their marketing and business development activities.

The survey's findings are compiled from data voluntarily given by marketing leaders from firms nationwide.

"As a long time member and Hall of Fame inductee, I have truly never belonged to an association where the members are so committed to each other as well as to helping the entire organization and the profession, flourish and grow," said Sally Glick, MBA, principal and chief growth strategist of SobelCo.

The association's members are also recognized as influential leaders in the accounting industry.

"AAM has been a place to go to learn, to teach, to pick up new skills, to meet new friends. But most of all, it's a place to build long-term relationships that you can rely on for the rest of your life," said Neil Fauerbach, AAM Hall of Fame member and retired business development director at BDO USA, LLP. Since joining AAM in 1990, Fauerbach says he continues to rely on the relationships he's built through AAM for advice and counsel.



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AAM members bring a wealth of marketing and business development experience and tailored expertise to the accounting profession. Today, as the industry continues to shift toward the advisory space, the knowledge of these members is even more valuable to firms that are looking for ways to grow and thrive in the years ahead.

"It's more important now than ever before for firms to maintain a growth mindset," said Becca Johns, AAM president. "Not only does AAM provide tools, education and resources to our members, but AAM continues to offer members a place to collaborate, network, share ideas, and learn from each other. We remain focused on providing real value to our members so they can grow in their own careers and help shape the future of the accounting marketing profession."

To work with accounting marketing professionals who specialize in culture change, AI, data analytics, compliance change management or other firm growth areas, contact Rhonda Clark at 859.402.9759. To learn more about AAM, visit the association's website at [accountingmarketing.org](http://accountingmarketing.org).

# # #

The Association for Accounting Marketing (AAM) is a national trade association and one-of-a-kind network of marketing, business development and growth strategists. The association was formed in 1989 to provide education, community and resources for accounting firms, CPAs, consulting firms and sales professionals, partners, firm administrators and representatives of businesses offering products and services designed for the accounting industry and marketing professionals. AAM is dedicated to promoting excellence and elevating the professional stature of marketing, business development and other practice growth professionals at all career levels by directly impacting their professional development and careers through education, networking and thought leadership to grow people and accounting practices.

Learn more about AAM at [accountingmarketing.org](http://accountingmarketing.org).



## AAM'S Support to Marketers & Business Development Professionals

- **AAM's Annual Summit** – A must-attend conference for growth-minded professionals with customized sessions for leaders building future-ready firms
- **AAM Connect** – Online networking communities for sharing ideas
- **AAM High! webinars** – Virtual education that tackles the industry's hottest accounting marketing topics
- **Growth Strategies and the AAM Minute** – A quarterly journal and monthly e-newsletter that provides readers with insight from the industry's leading marketers, sales leaders and CPAs
- **CPA Growth Trends** – Association-sponsored blog featuring regular articles geared toward firm growth and organizational leadership tactics
- **AAMplify!** – Monthly podcast episodes, available on SoundCloud and YouTube, that feature video podcasts with industry leaders sharing professional insight in concise formats
- **Access to industry-specific survey research** – Specific survey research and resources to guide informed decision making

# 2020 MARKETER OF THE YEAR

## Annie Somermeyer

### Marketer of the Year

Retired Director of Business Development  
SVA Certified Public Accountants

AAM's most prestigious award recognizes a marketer or business developer who has demonstrated exemplary performance in the field of accounting marketing. It is presented annually at the AAM annual awards event. Annie Somermeyer, director of business development at Madison, Wis.-based SVA Certified Public Accountants, has received the Association of Accounting Marketing's (AAM) 2020 Marketer of the Year award, sponsored by INSIDE Public Accounting (IPA).

Somermeyer and her team promote the CPA firm – ranked No. 67 on the 2019 IPA 100 list of largest accounting firms in the country – as well as SVA Wealth Management, SVA Trust Company and SVA Consulting. She is responsible for a \$1.2 million marketing budget and supervises eight business development team members.

Somermeyer brings marketing and sales together, and she leads several initiatives to bring a sales culture to the firm, including a business development training program for early-career professionals and a two- to three-year sales entrepreneurs program for principals. SVA's Sales Entrepreneurs produced over \$700,000 in new sales in FY19.

About a dozen firm professionals are selected bi-annually to take part in another Somermeyer initiative, a public speaker training program (SVA Speaker Source). The firm markets their program graduates as experts on a variety of business topics to speak at trade shows, conferences and expos primarily in the Wisconsin markets of Madison, Milwaukee and Fox Valley.

The "Measurable Results" branding campaign is one of her most successful initiatives to date. The campaign features two-minute videos and/or written stories that highlight the results clients have achieved while working with SVA. High interest in the Measurable Results stories pushed her to produce an additional eight videos, which have been well received on both social media and in print advertising, pushing the total to 34 in the CPA firm and 23 in SVA Consulting.

"Our tagline 'Measurable Results' became more than just branding, it set a benchmark in how we internally measure our own success," says CEO John Baltes. "We now have a growing portfolio of success stories told by clients, in their voice, on how SVA helped them be successful. Delivering measurable results has become the driving force in how we service and attract clients."

COO Jennifer Hoege, who nominated Somermeyer for this prestigious award, calls her visionary, tenacious, knowledgeable, dedicated and an exceptional leader. "Her team are raving fans and will walk through fire for her."

In addition to her work developing the firm's strategic vision and serving on numerous firm committees throughout her tenure, Somermeyer is heavily involved in the Madison community, where her volunteering has helped the Girl Scouts, Susan G. Komen Foundation and the Madison Symphony Orchestra, among other organizations.

