

THE FINANCIAL EDGE

April 2024



SPRING CLEANING

Personal comments by Mary

I clean when I get frustrated and my life feels out of my control. It's a coping mechanism with benefits. However, this spring I have a different purpose to my cleaning. My goal is to adapt my home to my ever-changing life. Life seems to have moved on, but the things in my house seem to linger. I have lived in the same house for 30 years, it's time to let go of part of my past. I no longer need business suits that don't fit. I no longer need a home office that I don't use. I can toss out the projects I started, lost interest and have been left half done. I even want to tackle the tangle of cable wires that line my basement ceiling, most, if not all, are not in use.

I want to reclaim parts of my home for another purpose. The most pressing project, is a place for my grandchildren when they visit. My grandson will be visiting in May from Arizona. He was here when he

was very little and couldn't move. However, he is now 2, very curious and very mobile. He is also stealthy and has no fear. I am creating a grandchild room; something to share and explore with him. So now the office stuff goes, I reduce the number of books and the bed moves to the floor. Over the bed I am creating a tent and making room to play.

Next, I am adapting my garden. In Arizona his backyard is fake grass and there are dangers such as scorpions and poisonous snakes. Very different from real grass, perennial gardens with birdbaths. I think my patience and resilience will be tested, but I look forward to the adventure. Spring cleaning sounds like fun this year.

Mary Guldán-Lindstrom



"Your mind is a garden, your thoughts are the seeds, you can grow flowers...or weeds." ~ Unknown

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"As both a personal client and a family business owner, I've entrusted Focus CPA with our accounting needs and they've consistently gone above and beyond. Their team understands the challenges and nuances of running a business and managing personal finances simultaneously. They provide tailored advice that has been crucial for our operations and growth.

*Eric Thompson,
Owner of Local Results Marketing
& Real Estate Investor*

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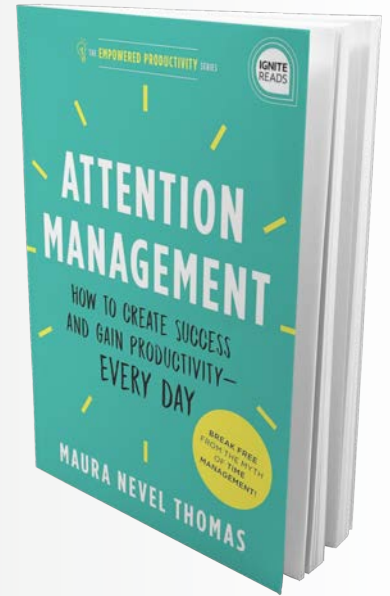


THE BOOK REVIEW

TITLE: Attention Management
AUTHOR: Maura Nevel Thomas
TOPIC: Focus
EASY TO READ: \$\$\$\$\$ (5 out of 5 dollars)
APPLICABLE TO SMALL BUSINESS: \$\$\$\$\$ (5 out of 5 dollars)

Summary: The author points out how distracting our current work world is. With smart phones, email, multitasking, open offices, remote work, etc. She stresses the importance of taking time to rest and recharge to maximize our productivity.

My recommendation: She has some great recommendations on improving our focus. There is an internal guide to evaluate your day – do you feel satisfaction and accomplishment? Or busy and productive or just busy? Do you feel exhausted or energized? It reminds me of busy doing or busy being.



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ATTENTION ALL WISCONSIN LLC'S AND CORPORATIONS — NO MORE POST CARDS

Remember the blue postcard you get from the Wisconsin Department of Financial Institutions each year notifying you to file your annual report? That is changing. During 2024, these required notices will transition to email notifications in place of postcards. All email notifications will be sent to the email addresses that are on record with the agency.

Please watch for these email notifications because they are reminders for you to act on maintaining your business entity throughout its lifecycle.

To determine if you are current with your annual registrations, go to WDFI, then select Business search and type in your business name. Once you have located your business, then note your status date – that's the month you will receive notification. Then verify that 2023 or 2024 annual report has been filed.

If you have questions or issues please contact our office, we can file the annual report or help you do it.



GET RID OF LIMITING BELIEFS

SPRING CLEANING IN MY MIND

By Mary Guldan-Lindstrom CPA

Recently I was in a business meeting and someone was asked what was his aha moment? He stated that he identified a limited belief he was holding on to. That belief was stopping him from moving forward on his goal. At that moment the light bulb flashed in my mind. What limiting beliefs am I holding onto? Could that be holding me back? Now that spring is here – it's time to remove the unwanted clutter from my mind.

For the last two years I have attempted to hire another CPA. I have not had any luck. My goal is to try it again; however, I am very hesitant. So why am I making this so hard? I suspect my limited beliefs are part of this.

MY FIRST STEP in letting go of my limiting beliefs is to identify them. It means stopping and listening to my own self talk. What am I telling myself that is stopping my progress? Here's what I have heard: We don't have enough work. Indeed and ZipRecruiter doesn't work for me, the last time I posted the job I had three people apply - two didn't even know was at a CPA was, the third hit a very bad spot in his life and just wanted a job. I can't find qualified help. The job market for CPA's favors the employee not the employer. The competition of qualified candidates is tough. I am concerned I won't be able to trust them. Hiring now is not a good time. This is impossible. All of these beliefs fail to give me confidence. They give me excuses and prevent me from taking action that will move me forward.

THE NEXT STEP is to dig deeper and challenge my beliefs. Why is this so hard for me? Is my belief based on fact or am I making assumptions? What evidence do I have to support or refute this belief?

My facts – I have five people working at focus CPA who want to be here. Last time I hired someone for 20 hours a week, the job went full time immediately. Trust will come after one tax season; it has with the last two new hires. I had great success with Indeed for another position. I did hire a CPA and they have been here almost four years. For the last few positions, it has taken three attempts to hire the right person.

When I look at other areas of my life, I have changed a few of my beliefs over the years. I got to experience my bucket list of an African safari in luxury, when I thought I could never afford it. I paid for half my boy's college, even though I didn't know how I was going to do it. I have built up my retirement savings so I feel fairly secure as I look toward my retirement. I raised my boys to be two very great men that I am proud of. Maybe I can do it.

NEXT IT IS TIME FOR ME TO REPLACE THOSE LIMITING BELIEFS AND THE BAD HABITS.

To being stop the negative self-talk and keep looking at my facts. Then refine the job description, create a marketing plan and post the job. Like Henry Ford stated "whether you think you can, or think you can't – you're right."

Do you need to do a little spring cleaning?

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TIME FOR SPRING CLEANING YOUR BUSINESS?

DO YOU WANT TO IMPROVE YOUR FINANCIAL RESULTS?

Let's review your current business situation, find your unique advantages and identify what is not getting you where you want to be.

We are setting up appointments for May.

Call us and let's get rid of the clutter!

920-351-4842

April 2024 INSIDE THIS ISSUE

FOCUS|CPA Inc

117A Packerland Drive
Green Bay, WI 54303
Phone: (920) 351-4842
www.FOCUS-CPA.com



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A LITTLE HUMOR: ACTUAL COMPLAINTS FROM CUSTOMERS

“We booked an excursion to a water park but no-one told us we had to bring our own swimsuits and towels. We assumed it would be included in the price.”

“The beach was too sandy. We had to clean everything when we returned to our room.”

“We found the sand was not like the sand in the brochure. Your brochure shows the sand as white but it was more yellow.”

“No-one told us there would be fish in the water. The children were scared.”

“It took us nine hours to fly home from Jamaica to England. It took the Americans only three hours to get home. This seems unfair.”

“I compared the size of our one-bedroom suite to our friends three-bedroom and ours was significantly smaller.”

“The roads were uneven and bumpy, so we couldn't read the local guide book during the bus ride to the resort. Because of this, we were unaware of things that would have made our holiday more fun.”

“When we were in Spain, there were too many Spanish people there. The receptionist spoke Spanish, the food was Spanish. No one told us that there would be so many foreigners.”

“My fiancé and I requested twin-beds when we booked, but instead we were placed in a room with a king bed. We now hold you all responsible and want to be re-reimbursed for the fact that I became pregnant. This would not have happened if you had put us in the room that we booked.”

From inspire21.com/actual-complaints-received-by-thomas-cook-vacations-from-dissatisfied-customers/

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