

A Place to Turn:

The Concerned CPA Network Offers Confidential Assistance to TSCPA Members





The TSCPA Peer Assistance Program is an important benefit that helps members overcome job-impairing alcohol, drug, depression, anxiety, and other related problems. Few states in the United States have a peer assistance program to extend help to CPAs whose lives and careers are impaired due to these problems. Texas is one of the few.

The program's stated purpose is:

To offer CONFIDENTIAL assistance to Certified Public Accountants and accounting students who may have a drug or alcohol dependency or mental health problem.

At the core of the program is the Concerned CPA Network, which is a statewide organization of recovering CPAs. They have volunteered to share their experiences with other CPAs and accounting students. While not a treatment program, the Concerned CPA Network offers support for impaired individuals and makes referrals to structured treatment programs like Alcoholics Anonymous. Volunteers in the Concerned CPA Network receive training on chemical dependence and mental illness, intervention skills, guidelines for identification, and policies and procedures used by the TSCPA Peer Assistance Program.

Although alcoholism and drug dependence are the most common problems, volunteers also guide people who need help with depression, anxiety and other emotional disorders that contribute to impairment. These problems are widespread in the United States. Consider the following statistics and information.

Alcohol¹:

- nearly 17.6 million adult Americans abuse alcohol or are alcoholic; several million more adults engage in risky drinking that could lead to alcohol problems;
- 53 percent of men and women in the United States report that one or more of their close relatives has a drinking problem; and
- in purely economic terms, alcohol-related problems cost society approximately \$185 billion per year; in human terms, the costs cannot be calculated.

Drug Dependence and Abuse²:

- drug abuse is a major public health problem; every community and family, directly or indirectly, is affected by drug abuse and addiction;
- drugs take a tremendous toll on our society, including health care expenditures, lost earnings, and costs associated with crime and accidents; and
- control of drug abuse is a top priority of the United States Surgeon General as outlined in the Healthy People 2010 goals for the nation.

Depression³:

- in any given one-year period, 9.5 percent of the population, or about 20.9 million American adults, suffer from a depressive illness;
- depression can destroy family life, as well as the life of the ill person; and
- most people with a depressive illness do not seek treatment, although the great majority can be helped.

Anxiety Disorders³:

- about 40 million American adults age 18 years and older (about 18 percent) are affected in a given year, causing them to be filled with fearfulness and uncertainty;
- these disorders commonly occur along with other mental or physical illnesses, including alcohol or substance abuse, which may mask anxiety symptoms or make them worse; and
- in some cases, these other illnesses need to be treated before a person will respond to treatment for the anxiety disorder.

Here to Help

The TSCPA Concerned CPA Network is dedicated to informing affected individuals, motivating them to seek help, and to assist

them in their recovery. The program has a variety of resources available to provide assistance, including a toll-free help line at 800-289-7053. Often, those who need help call the network themselves. Other referrals come from family members, friends, partners, associates, and office staff who call the network seeking to speak to a volunteer to get in touch with an impaired person. In any case, the affected person is not obligated to participate in the program.

All information received from or about CPAs who voluntarily contact the network is completely confidential according to Texas law and the TSCPA Peer Assistance Program's policy. The information cannot be divulged to any disciplinary body.

In addition, the program accepts referrals from the Texas State Board of Public Accountancy (TSBPA) in certain disciplinary cases. In these cases, the program monitors the rehabilitation activities under the terms of Agreed Consent Orders signed by the CPAs themselves.

New Program Director Added to Staff

TSCPA member **Ken Laney**, CPA, JD, joined the Society's staff in December, 2006, as the new Program Director for the Concerned CPA Network. Laney's experience includes more than 20 years of tax planning and compliance work for estates and trusts, most recently with Briggs & Veselka Co. He has also been through recovery, and has been involved with the TSCPA Peer Assistance Committee and Concerned CPA Network for a number of years.

Laney's work and personal experience will benefit TSCPA and the Concerned CPA Network. He said: "I know what it's like to face these problems. I discovered alcohol in my junior year of high school. Alcohol changed my perception of the world, and after a few drinks, I was suddenly and remarkably transformed. Whatever was broken, alcohol always seemed to fix it."

Eventually, alcohol and substance dependence quit being the solution and became the problem. He said: "It was only after I had made countless decisions to quit forever that I came to accept that quitting on my own was impossible. No amount of perseverance, intelligence, self-knowledge, or willpower seemed to work. When I finally reached out for help, a member of the

Concerned CPA Network was one of the people most instrumental to my recovery."

Laney has now been sober for more than 12 years, and he is well connected in the recovery community. He said: "It took me a long time to become willing to follow directions and do things I did not understand nor believe would help. But following directions has enabled me to become, for the most part, the person I always wanted to be; there simply is nothing for alcohol to fix today because nothing is broken."

"When I finally reached out for help, a member of the Concerned CPA Network was one of the people most instrumental to my recovery."

Ken Laney

Program Director

Concerned CPA Network

Laney said his current objective in life is to do his best to accomplish something of true benefit to society. Pursuing this objective led to his desire to take the new Program Director position for the Concerned CPA Network. He commented: "If you're able to quit, members of the Concerned CPA Network have the experience necessary to help you adjust to a life without alcohol. If you are unable to quit entirely when you try, there are also those among us with the experience to help you find another way out." You'll be able to read more

about Laney in the Spotlight on CPAs article in the next issue of *Today's CPA*.

Peer Assistance Funding Authorized by the Texas State Board of Public Accountancy

At its May 2006 meeting, the Texas State Board of Public Accountancy (TSBPA) approved funding for an improved peer assistance program for Texas CPAs. The purpose was to expand the existing program operated by TSCPA on behalf of the State Board.

An amount of \$65,000 was authorized by the State Board to help fund the program. This amount will be combined with financial support by TSCPA members, as well as administrative and staff support by TSCPA. The total funding will be approximately \$85,000 annually. This funding will enable the network to expand its outreach program. Plans for the program include increasing awareness and adding resources for both peer assistance and professional referrals. Some of the activities will be to:

- provide support and recommendations for impaired CPAs;
- operate the confidential hotline and offer crises counseling and referrals;
- provide meetings for impaired CPAs;
- make presentations and conduct training;
- visit schools and universities;
- prepare brochures and other literature for distribution;
- create articles and information pieces for publication in professional journals and the TSBPA State Board Report;
- recruit, train and maintain current relationships with a statewide network of volunteer CPAs;

Meeting State Regulations and Guidelines

The TSCPA Peer Assistance Program complies with Chapter 467 of the Texas Health and Safety Code and related regulations issued by the Texas Commission on Alcohol and Drug Abuse. By meeting these guidelines, the program qualifies for the grant of civil immunity provided by the statute. Therefore, those individuals involved in administering and operating the program are protected from civil liability.

This immunity does not extend to impaired professionals whose actions damage clients or others. In addition, participation does not shield impaired CPAs from the consequences of violating ethical and other disciplinary standards.

- ▶ administer the voluntary monitoring program for TSBPA and provide monitors for CPAs under TSBPA agreed consent orders;
- ▶ develop a data base of volunteers willing to assist other CPAs and accounting students; and
- ▶ develop a data base of resources of physicians, mental health professionals and other referral sources.

For More Information

If you or someone you know has an alcohol or substance abuse problem – or if you want to help other CPAs and accounting students in their recovery – be sure to contact the TSCPA Concerned CPA Network for a referral to a member near you. All calls and messages are strictly confidential, and individuals currently in recovery programs respond to the inquiries. The hotline is available by calling 800-289-7053 or e-mailing klaney@tscpa.net.

You can also visit the Concerned CPA Network area of TSCPA's Web site for more

The Concerned CPA Network

Call 800-289-7053 or

e-mail klaney@tscpa.net

for a confidential referral to a member near you.

information. Go to tscpa.org, select Resource Center, scroll down and select Concerned CPA Network. Links to resources are posted there, including an article titled, "Career Killers . . . Substance Abuse: Depression and Stress in the Accounting Profession," taken from a paper by Don Jones in his work with the Professionalism Enhancement Program of the State Bar of Texas. The article identifies how to recognize the signs and symptoms of chemical dependency and mental health problems.

While most CPAs will never suffer from substance abuse, depression, anxiety, and other related disorders, at some point in their careers almost all CPAs will interact with someone who does. You owe it to your clients and the profession to not only seek help if you need it, but to also provide assistance to others who can benefit from a recovery program.



Footnotes

1. The National Institute on Alcohol Abuse and Alcoholism (NIAAA), part of the National Institutes of Health, a component of the U.S. Department of Health and Human Services.
2. The National Institute on Drug Abuse (NIDA), part of the National Institutes of Health, a component of the U.S. Department of Health and Human Services.
3. The National Institute of Mental Health (NIMH), part of the National Institutes of Health, a component of the U.S. Department of Health and Human Services.

Business Valuation and Beyond Niche Opportunity Training



Certified Valuation Analyst

The National Association of Certified Valuation Analysts (NACVA) has trained over 12,000 CPAs and other professionals in business valuation and certified over 7,000 of them. With over 50 courses dedicated to the continuing development of the valuation practitioner, NACVA meets the full range of BV practitioner educational needs. NACVA also has an unparalleled infrastructure to support BV practitioners in this rewarding discipline, from a full-service research center, to a wide variety of marketing tools, to the most sophisticated, yet user-friendly, valuation and report writer software. Through its Consultants' Training Institute, it also offers training and certification programs in other lucrative niches such as litigation consulting and forensic accounting, mergers and acquisitions, intellectual property, and exit strategies.

If you would like to explore the dynamic and challenging field of business valuation, you will be pleased to know that we will be holding a five-day **Business Valuation and Certification Training Center** in:

Dallas, TX • May 7–11, 2007

If you prefer to obtain just a solid foundation in business valuation, without certification, you may attend only the first two days of the program—Business Valuations: Fundamentals, Techniques and Theory, May 7–8, taken by over 12,000 professionals worldwide.

For additional details and to register, call **NACVA Member Services: (800) 677-2009** or visit our website: www.nacva.com.

National Association of Certified Valuation Analysts Consultants' Training Institute

1111 Brickyard Road, Suite 200, Salt Lake City, Utah 84106-5401
Tel: (801) 486-0600 • Fax: (801) 486-7500 • Internet: www.nacva.com