

# Creating Harmony

## Lisa Wentz has leveraged Bookminders' flexible workplace to achieve the optimum balance of career growth and personal fulfillment.

After working in DC as a Financial Analyst and Controller with US News & World Report, Lisa was excited to return to her Philadelphia roots in 1995 to raise her three children. In 2007, while working as an independent bookkeeper, Lisa learned that Bookminders had opened a Philadelphia office and was looking for part-time accountants. "I liked being self-employed since it gave me the ability to work my schedule around my family's needs. On the other hand, finding new clients was time consuming and I didn't enjoy it. I needed more harmony between work and family life, but I was only willing to change if it didn't require full time hours. The flexibility offered at Bookminders, and the ability to be instrumental in growing a new office, created the perfect opportunity for me.

Over the next few years, Lisa became an expert bookminder, leading to an increase in clients and special project work. "I was enjoying myself immensely and I had all the personal time I needed. It was the perfect blend of work and family time for me." In 2013, a promotion to Project Manager expanded her responsibilities and earning potential, without a move to full-time. "I was continuing to progress in my career while maintaining my part-time status." In 2015, Lisa was named Client Relations Manager and in late 2022, promoted to Director of Operations for the Philadelphia and South Jersey offices. "I enjoy being a valued resource for our accountants and clients, leading them as they grow with Bookminders."

Lisa feels the growth opportunities at Bookminders have provided incredible personal and financial rewards. "It was great to contribute to my kids' education without missing any time with them. Now that they are grown, I can focus on saving for retirement while exploring my personal interests." Full-time work might be possible for Lisa at this point in her life, but it's certainly not a move she's planning to make anytime soon. "Why would I go full-time? I'm not missing out on anything. With Bookminders, my work and personal lives are already perfectly blended."

### Why Clients Use BOOKMINDERS

- Increase mission focus
- Implement efficient processes
- Address complex requirements
- Minimize accounting costs
- Improve financial controls
- Eliminate turnover disruptions

### Why CPA Firms Refer BOOKMINDERS

- Maintain independence
- Increase profitability
- Assure service timelines
- Focus on high value services
- Improve engagement efficiency
- Eliminate cleanup work

### About BOOKMINDERS

For more than 30 years, Bookminders has provided timely, accurate and cost-effective bookkeeping for nonprofits and small businesses. Its unique approach affords work-life balance to a staff of 80+ degreed accountants, while providing access to highly skilled professionals clients otherwise couldn't afford.

### About Lisa

Lisa Wentz, a graduate of Gettysburg College, is the Director of Operations for Bookminders Philadelphia & South Jersey. She is an avid runner and community volunteer. Lisa currently resides in West Chester, PA.



Lisa Wentz

Director of Operations, Philadelphia & South Jersey