

LISA WENTZ: CREATING HARMONY

Posted on February 1, 2019



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.



Lisa Wentz, Client Relations Manager

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 promoted again to Client Relations Manager. "I enjoy being a valued resource for our accountants, leading them as they grow with Bookminders. As a manager, the variety of my work keeps me challenged and engaged without consuming every hour of my day."

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 timeliness
- Focus on high value services
- Improve engagement efficiency
- Eliminate cleanup work

About BOOKMINDERS

Bookminders provides timely, accurate and cost-effective bookkeeping for nonprofits and small businesses in the Mid-Atlantic region. In unique agencies, we offer weekly, bi-weekly or monthly services to help you balance your books and stay on top of your financials. We provide access to highly skilled professionals clients otherwise couldn't afford.

About Lisa

Lisa Wentz, a graduate of Gettysburg College, is the Client Relations Manager for Bookminders Philadelphia. She is an avid runner and community volunteer. Lisa currently resides in West Chester, PA.

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