

## The CPA – An Underused Resource For Achieving Your Goals

The year 2003 is almost over.

How are you doing?

Remember those grand plans you made at the beginning of the year? What's happened to them?

Or, remember how you *meant* to make some grand plans, but you have been too busy "fighting fires" to do it?

You have the best intentions. You read the stuff I write and think, "Wow! This stuff is really great. I really should do something with it sometime." And you don't.

You know that personal financial planning is one of the highest payoff things you can do. And it's even more important to implement your plans for consistent improvement of your personal financial situation. A plan that sits on a shelf is a waste of time and money.

Yet you allow "urgent" priorities to overwhelm "important" ones.

What do you want from life?

What would you like your life to look like five years from now? Ten years? Fifteen years? Twenty years? *Write it down in detail.*

What did you do to start to make that picture a reality today? Last week? Last month?

What will you do to make that picture a reality tomorrow? Next week? Next month?

How will you assure that you do it?

Your CPA is an underused resource. Most people are trying to get their tax returns done for the minimum fee. But they could get so much more benefit by spending more to meet with their CPA on a regular basis (at least quarterly, possibly as often as weekly!) to work on their personal financial goals.

Your CPA can help you set and monitor measures to determine how you are progressing, and counsel you to improve your progress. Just the discipline of meeting with someone on a regular basis to focus on these issues will help you make an enormous leap forward. The CPA advisor doesn't necessarily *provide*

the answers to your problems. In the consulting process, you often define the problems and answer yourself. And then you do something about them. Many people start a physical conditioning program and fail, but when they meet a personal trainer on a regular basis, they find they can stick with their conditioning consistently.

Isn't your financial health almost as important as your physical health? The same concept applies.

As the old Chinese proverb says, "A journey of a thousand miles begins with the first step."

The first step is a decision to stop accepting procrastination. You must take action now to start making your vision of your future a reality. Call Anne Tahim, CPA, today, to invite her to work together with you on a regular basis as your "personal trainer in personal finance" to make your dreams come true.

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The information mentioned here in above is of general nature and cannot be regarded as legal or tax advice.



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