

Fiske & Company

Father/daughter duo propels accounting firm into dynamic territory

To hear CPA Sheri Schultz tell the story, her successful business partnership with father Alan Fiske in the firm of Fiske & Company Certified Public Accountants and Consultants was tantamount to a fait accompli.

“Since I can remember, I’ve always wanted to be an accountant,” Schultz professes. “The truth of the matter is that my father and I always talked business and have always been very close,” she adds. “We have the same thought processes, the same desire to exceed clients’ expectations and are so in line in terms of our business outlook, it’s almost eerie.”

One of the few students at Hollywood High School taking advanced accounting classes, Schultz attended the University of Florida, receiving a B.S. degree in accounting and an M.S. degree in taxation. She then joined Coopers & Lybrand, now PricewaterhouseCoopers, in the tax department with the ultimate goal of achieving a partnership in a “big eight” accounting firm.

Her career trajectory changed five years later in February 1980 when she finally succumbed to her father’s pleas for her to join the family business. The resulting dynamic duo built upon Fiske & Company’s already considerable success, propelling the firm to the status as one of South Florida’s most in-demand CPA establishments.

Fiske founded the eponymous company in 1972 following stints with a national accounting firm as an Internal Revenue Service Agent and the founder of a Miami-based systems analysis and software development company that created computerized spread sheet and financial data management software, much like today’s Lotus 123 and Microsoft Excel programs.

Armed with a background that validated the belief that a business’s profitability was directly correlated to efficient operations, effective systems and controls, and well-qualified management, he put his knowledge base to work for clients, initially focusing on tax planning and investment partnership work.

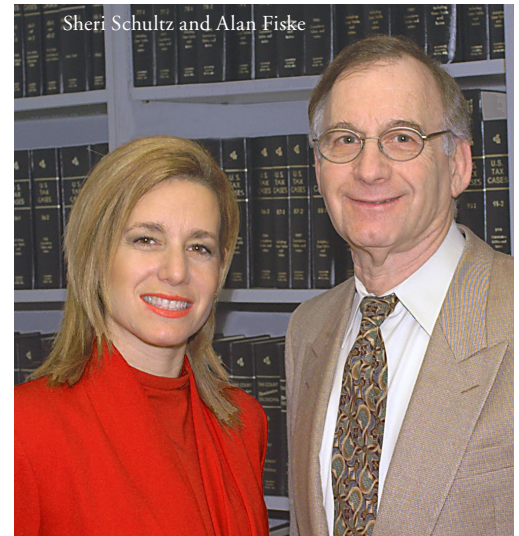
When the Florida Department of Transportation approached Fiske to analyze potential damage claims associated with road expansions, he realized that

valuation work was a highly specialized category in which few accountants had experience – and one that presented a unique opportunity to grow his firm. Fiske’s instincts were borne out when he joined several national valuation organizations, the American Society of Appraisers and the Institute of Business Appraisers, only to discover a dearth of accountant membership in the two.

Enter Schultz, who took on the task of developing the business niche as director of Fiske & Company’s Valuation Services Department. Dad’s instincts paid off handsomely. Schultz, now a partner in the firm, is recognized as the go-to valuation accountant in the South Florida marketplace and beyond, offering expert counsel and practical insight concerning business valuations and related tax issues. Clients run the gamut, from small mom-and-pop operations to large corporate entities. Concurrently, she plays a vital role in expanding the profile of the specialty within the industry, launching the Florida Institute of Certified Public Accountants’ (FICPA) Valuation and Litigation Services Section, for which she received the Chair of the Year award in 2004-2005. She is also a sought-after national speaker on business valuation topics.

Schultz services a large number of clients in the estate and gift tax planning sector as well, many of whom she originally assisted with buying or selling businesses. “It means a great deal when a former business valuation client calls me years after our initial contact to prepare additional valuations or perform some other high-end consulting service,” Schultz notes. “Whether it’s helping clients make ends meet at the end of the day or providing expert advice, I pride myself on taking creative approaches to the business at hand, whatever it may be. It’s enormously rewarding and helps me evolve professionally.”

While Schultz was busy cultivating her end of the business, Fiske was evolving as well. In keeping with the firm’s mission to continually meet client demands, he began to take on assignments in the legal arena. Today, the firm is recognized for its unparalleled expertise and professional



**& FISKE
COMPANY**

Contact Info:

Fiske & Company

1000 S. Pine Island Road,
Suite 440
Plantation, FL 33324-3904
P: 954.236.8600
F: 954.236.8603

info@fiskeco.com
www.fiskeco.com

perspective on a range of issues in the litigation support and forensic accounting arenas. Fiske has served as an expert witness in federal and circuit courts throughout Dade, Broward, Palm Beach and Martin counties in southeast Florida, as well as in Jacksonville, Fla., and Delaware. He has also appeared as a litigation expert on CNN’s “For Your Money” television show and on various financial radio talk shows throughout the country.

“Despite the expansion in the type of services and areas of expertise we have offered throughout the years, one objective of the firm has remained constant throughout its existence,” says Fiske. “That is our commitment to the highest of standards and an unprecedented level of personalized service to our clients.” BL