



EXECUTIVE LEADERS RADIO



Kathleen Poorbaugh

Principal/CPA

Homes, Lowry, Horn & Johnson, Ltd.

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Kathleen Poorbaugh has a unique understanding and acumen for business. As you will read in her profile, Kathy has an innate ability to connect with each one of her clients. She learned this important skill at a young age and continues to incorporate it today in her practice. Her unique ability to lead has driven her through the years to create the path to her own success.

Kathleen maintains more than twenty years of accounting and tax experience, specializing in tax consulting and compliance, planning, and research for government contractors, closely held corporations, medical practices, commercial entities, and individual taxpayers, and accounting and management advisory services for commercial businesses.

Kathleen advises on corporate tax issues, including tax planning for mergers and acquisitions of closely held organizations; business start-up issues, such as entity choice and accounting methods; accounting system development; executive compensation; and state tax planning. Kathleen is also an expert in helping individual taxpayers—including self-employed individuals—with tax planning and compliance, especially estate planning, real estate investments, and maximizing retirement plan contributions. She has worked with many executors of estates, handling not only tax compliance, but also probate accounting, estate distributions, and planning for beneficiaries.

What does the company do for its customers:

Homes, Lowry, Horn, & Johnson, Ltd is a local public account firm specializing in all aspects of tax planning and compliance. Specialties include high net worth individuals, government contractors, non-profit organizations, and professional service corporations.

Who are the company's customers:

Kathy's company services high net worth individuals, government contractors, car dealerships, professional IT firms, those needing 401(K) audits, CFO outsource, and finally mergers and acquisition work.

Why don't the company's customers use a competitor:

Kathy indicated that Homes, Lowry, Horn & Johnson, Ltd is trusted and used by their clients as they are proactive planners, not response oriented. They also keep in touch with their clients. The firm attracts and retains clients who are looking for personal service and personal relationships. This is why Homes, Lowry, Horn & Johnson, Ltd stands out from the competition.

How did the CEO get involved:

As Kathleen was successful and well known in the business, she had a positive reputation following her. In-turn, the Principal at the firm, Roger Overton, reached out to her and offered her a position at firm that would allow her to continue to use her interpersonal skills.

Learn from growing up and how it applies to the success today:

Growing up, Kathy was a babysitter and earned a little bit of money each year for her ongoing jobs. She took the time to get to know her neighbors and understand their needs. She developed personal relationships with each babysitting "client" and in-turn, provided personal serve. Kathy worked earning money babysitting until she went off to college.

Brother and Sisters/Pecking Order:

Kathleen has a brother who is several years younger than she is.

Mom's Career:

Kathy's mom was initially a stay at home mom. Upon the divorce, her mom became a secretary in her attempt to provide a better life for the family. This all happened while Kathy was away at college. Kathy would then come home to take care of her mother.

Dad's Career:

Kathy's dad was a sales representative.

What did CEO learn when they were younger and how does it apply to their success today:

Kathy learned to be a leader when she was younger. She learned to build her own business through babysitting and getting neighborhood referrals. She also learned the value of personal service and taking care of clients.

How does the CEO give back:

Kathy and her firm are actively involved in monthly "Jeans Day" to raise money for various charities throughout the year. As a team/firm they perform a day of service at Nottoway Park in Vienna, VA. There they pull weeds, plant trees and mend fences. And finally she takes part in golf tournaments to help raise money for different charities that are near and dear to her.

Interviewed by:

Andrew Lewis, CIMA®, AAMS
Managing Director
The Lewis Financial Group