

Amy Davis: Personality + accuracy adds up for clients

By SUSAN MCFARLAND

Tribune Correspondent

When Amy Davis, CPA, started her own accounting firm five years ago, at the age of 33, she had only one goal: to have her own secretary by age 45. She hit that goal pretty quickly and now has a team of seven, including not one, but two administrative assistants, three tax accountants and two bookkeepers. She has further plans to hire two more staff members in the coming months.

Today, the practice has more than 1,400 customers, ranging from single people who need help with their tax returns all the way to companies employing over 100 people who need regular bookkeeping services. Davis said the practice focuses 40 percent on small business bookkeeping and 60 percent on personal tax returns.

Davis attributes the success of her practice to her staff.

“What makes us different is our personalities. We are approachable, patient, real people. We understand that everything in life is not black and white, and that people’s lives are

messy and we are good with that. We rarely have clients who leave us or are unhappy. Customer service is really important and we really do want to just help people.”

The practice provides a myriad of services, including personal and business income tax filings, bookkeeping, payroll, training and correspondence with the IRS. Basic itemized tax returns start at \$350.

“We also routinely form entities for people starting a small business. A person will come to us and say, ‘I’ve got this idea, I want to start a new business.’ We will talk through their goals and their exposure to liability and then determine the type of company to set up and set it up. My main concern is their legal protection. Taxes come second,” said Davis. The practice charges \$500 to set up an LLC.

As far as bookkeeping services, Davis said the practice offers a one-stop shop for all accounting needs for small companies. “We can do payroll, bookkeeping and monthly financials. Accounting services generally range from \$350 to \$500 a month. I always

tell people who are trying to decide whether to use us or hire a part-time person to use us because we are cheaper and will keep an eye on your numbers,” she said.

Davis said she is able to monitor a business’s income and expenses through viewing their online bank accounts. “We just go in and download their bank statements right into QuickBooks,” said Davis.

For business owners and bookkeepers who need training on QuickBooks, Davis will provide one-on-one training for \$75 per hour. She said the average person needs two to three hours of instruction time. “We customize it for the customer’s needs. Not everyone needs the same functions of QuickBooks.”

Davis graduated in 2001 from Texas A&M with an accounting degree. After college she worked at Arthur Andersen, then worked in accounting in the corporate world before joining Houston boutique accounting firm Briggs and Veselka.

In 2012, her father encouraged her to start her own accounting firm and

offered her a loan to take the leap.

“I told him I needed \$8,000 to pay for a computer, a desk and one month of bills and that’s what he loaned me. That’s all I needed and I’ve since paid him back,” said Davis. Her first one-room office was very close to her current location, near the Dunkin Donuts on W. Lake Houston Pkwy.

Davis said she loves meeting with people and never has a boring day.

“I love talking to people, tax planning and numbers. I’m really a big dork. I have clients in so many different areas. I work with Realtors, hair stylists, lawyers, doctors and lawn companies. I have some really interesting clients who have invented products and sell them on Amazon. One of my clients, who used to live locally, invented the Baby Bum Brush, a silicon stick that helps diaper cream or medicine go on smoother, thicker and faster. She’s a really neat lady,” said Davis.

Amy Davis, CPA, PC, is located at 18321 W. Lake Houston Pkwy. in Humble. For more information or to make an appointment, call 281-570-2247.



OWNER:
Amy Davis



Amy Davis CPA, PC
Lake Houston CPA

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but a reality to be experienced.**