

making it happen for you!

Heather J. Losi

CPA, MBA, LOSI CERTIFIED PUBLIC ACCOUNTANT, PLLC

Working as a senior accountant for an accounting firm, Heather Losi yearned for the flexibility of running her own business, especially since she and her husband planned to start their family. Since entrepreneurship is in her blood—her mother is an artist—Losi positioned herself to make the move from her salaried job. She gained valuable work experience, sat for the CPA exam, obtained the certification, then quit her job to start her home-based business: Losi Certified Public Accountant, PLLC.

“I started with two clients,” Losi says. “I did well enough with those two clients to be able to pay all of my bills, and the company grew from there.”

Losi grew her company through word-of-mouth marketing and referrals from larger regional CPA firms, including the firm for which she used to work. She joined the local Chamber of Commerce and the New York State Society of CPAs. She participated in networking events where she met other business owners and other accounting colleagues. Losi estimates that it took two to three years for those contacts to start paying off for her.

“I think it took that long because I was getting to know the people that would provide referrals later, and they were getting to know me as a person,” Losi says. “If they’re going to refer their clients or people they know, they want to trust the person getting the referral.”

Losi soon found that the biggest challenge about working at home was . . . working at home. “When you work for someone else, you leave the house and go to the office. When you work out of your house, you have the distractions of house things that are always there,” Losi says. It took discipline for her to ignore doing the laundry or emptying the dishwasher and focus on doing the work of the business.

After learning to cope with house distractions, Losi discovered another challenge: family and friends. “I had to make sure I communicated to everyone that even though I was at home, I was running a business. That way, people wouldn’t call me in the middle of the day or stop by because they knew I was home. I think it’s important to make that distinction—even though you’re home, you’re still working,” Losi says.

After three years of working at home, Losi moved her business to a one-room incubator office. “I wanted to take the business to that next professional level,” she says. “I wanted to project a more professional image of myself. An image that says: I just don’t provide bookkeeping services from my home; I provide accounting services from my office.”

The volume of business increased, and two years after that, Losi moved her business again. She now occupies a two-room office with enough space for her and for

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another CPA who works part-time. And Losi's business continues to grow.

"I became an entrepreneur for the flexibility," Losi says. "But as my company gets bigger and I get busier, I find that flexibility dwindling a little bit. Getting part-time

help has put some flexibility back into my schedule. I am still committed to growing. I haven't reached the point of saying 'I'm satisfied with what I have, and I don't want to take on anything else.' What that point is, I don't know; I just take it day by day." ●