

## Public speaking instructions

CPAs are highly regarded by the public for providing trustworthy and accurate financial advice on many topics. That's never been more important, since Americans are now very concerned about their financial futures. You can help by speaking to community and business groups, and local school children on a variety of topics. This gives you valuable public speaking practice, expands your networking opportunities and positions you as a financial expert in your community.

Here are a few ways you can share your expertise for the good of the public.

- **OSCPA financial literacy programs**

OSCPA and its charitable affiliate, The Ohio CPA Foundation, are committed to helping Ohio citizens learn how to manage their money through the many stages of life. The Financial Fitness Ohio Web site offers timely advice for consumers on a variety of financial topics. OSCPAs also operates several community programs in which CPAs volunteer to teach children basic money management concepts.

 **Accounting for Kids Day®**—Teach elementary students the fundamentals of saving and investing at a school in your community. <http://www.ohioscpa.com/Content/40802.aspx>

 **High School Accounting Career Days**—Introduce students to the many career possibilities of a CPA. <http://www.ohioscpa.com/content/45149.aspx>

### Become a speaker in your community

You can also reach out directly to groups in your community and offer to provide a program on a specific financial topic. OSCPAs offers ready-made presentations on various personal and business related topics. These are available free for members.

Examples of groups that might be interested in hosting a CPA speaker include:

- Chambers of Commerce
- Rotary and Kiwanis Clubs
- Senior citizen centers and retirement communities
- Public libraries
- School PTOs or high school guidance counselors

### How to promote yourself as a speaker

- Develop a list of topics on which you would be comfortable speaking or use one of OSCPAs presentations.

-  **Download PowerPoints**

- Identify local groups you can contact to offer your speaking services.
- Prepare a letter introducing yourself and your interest in providing a program. Or download the OSCPAs letter template for and customize it for your own needs.

-  **Download OSCPAs letter**

- Follow your letter up with a phone call to the group several weeks later. Again, express interest in becoming a speaker and ask if there are particular topics that are relevant for members, and when would be the best time to give such a presentation.
- Once you are invited to speak, work through the details of the event.
- Inquire about the meeting room. How large is it? How will it be set for the meeting? Will there be a podium and a microphone, and can you use Powerpoint? This will help you prepare for the presentation.

- Prepare your presentation at least one week before the meeting, or download a ready-made presentation from OSCPAs speaking resources.
- Practice giving your presentation to family or friends several times before you must give it for the group. You can also review these useful speaking tips from the AICPA

### AICPA speaker tips

<http://www.aicpa.org/Professional+Resources/CPA+Marketing+Toolkit/speeches1.htm>

### The Day of the Presentation

- Take a supply of business cards and your brochure. Confirm that you will be allowed to hand these out or at least display them as a leave behind.
- Arrive at the meeting at least 30 minutes before you are scheduled to speak so that you have plenty of time to set up your laptop, check the sound equipment, organize handouts and get a drink of water.

### Follow Up

- Within two days of your presentation, send a thank you note to the meeting organizer.
- If you would like to speak to the group again, offer suggestions on additional topics that may have come to mind through participants' questions.
- Agree on a date for a second presentation as soon as possible.

### Speaker Resources

OSCPA has developed presentations on a variety of topics. These are available for your use, and can be customized to fit the needs of your audience. After you download a presentation, simply add or delete slides, and type in notes to fine tune your presentation.

### Click here to download the following speaker resources:

- Letter template to promote yourself as a speaker (MS Word)
- Speaker Presentations (PowerPoint)

#### *Business Topics:*

- > *Building a retirement program*
- > *Succession planning*
- > *Selecting group health care plans*
- > *Selecting a structure for your business*

#### *Consumer Topics:*

- > *Your tax strategy*
- > *How to afford retirement*
- > *Recordkeeping*
- > *Buying your first home*
- > *Funding a college education*

### Click here to access additional speaker topics from the AICPA.

<http://www.aicpa.org/Professional+Resources/CPA+Marketing+Toolkit/Speeches.htm>

## Letter to civic and business groups

print on business letterhead



Download introductory letter to local media

Date  
Contact Name  
Name of Organization  
Address  
City, State ZIP

Dear [name]:

I'm writing to introduce myself and offer my services as a presenter for an upcoming meeting of [name of group].

As a Certified Public Accountant, I've worked closely with clients over the past [x] years to help them identify and meet their financial and business goals.

But not everyone has access to a CPA at a time when the tax and financial climate is extremely complex. Many people in our community could benefit from sound advice that helps them lower their taxes, manage their money and save for the future.

If your members could benefit from this type of expertise, please call me to schedule a presentation for your group.

I can host a valuable and interesting discussion on a number of business or personal finance topics. These might include [list your preferred topics or insert any from OSCP presentation topics].

Enclosed is a brochure with my bio and professional expertise. I will follow up with you next week to talk more about how I can assist with your programming needs.

Thanks in advance,

[your name, credentials]