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Subject: April 15, 2025 Tuesday Lead Share Minutes
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Updated Account Balance

- The updated account balance is \$1,483.40.
- \$600 was spent on sponsorship.
- \$25 was spent on Valor Awards.
- \$600 was spent on Paul Klinger.

Leads and Growing the Group

- Turn in leads using forms or spreadsheets.
- Focus on growing the group size.
 - There are approximately 16 to 18 businesses represented in the group.
 - There are 130 possibilities.
- Find people that can join the group.
 - Becky is the most recent member.
 - Retail realtors are logical additions.
- Get creative and think about people who would enjoy the meeting.

Multiple Lead Shares

- The group discussed whether one business can be in multiple lead shares.
- It was generally agreed upon that it is allowed.
- The personality of the group and the makeup of the industries are important factors.

Upcoming Events (Benjamin from the Chamber)

- Professional Development Book Club: This Friday from noon to 1:00.
 - Book: "One Page Marketing Plan."
- Business Networking Lunch: Next Tuesday the 22nd at Harry's at Airlie.
 - Cost: \$35 for members, \$40 for non-members.
 - Able Heating and Air and Touchstone Crystal Betsy Bishop are sponsoring tables.
- Valor Awards: Next Wednesday the 23rd.
- Grand Opening and Ribbon Cutting Ceremony for Oak View National Bank: May 8th.

Chamber Announcements

- Ribbon cutting:
 - Guests can arrive at 4:30.

- There will be wine, beer, and light bites.
- It will merge with the After 5 event.
- Fantastical marketing will be present.
- All details are on the website.
- Lead Share:
 - The Chamber is driving lead share through ads.
 - QR codes will take people to the lead share page.
- Valor Awards:
 - There are two tickets available.
 - They can be donated or divided amongst the attendees.

Member Introductions

- Dr. Tom Nikolai Faulkier (chiropractor):
 - Offers chiropractic services for back care.
 - Encourages people to take care of themselves.
- Becky Miller (Piedmont Pine Properties):
 - Specializes in residential sales and property management.
 - Manages 250 rental units in the area.
- Fauquier county show and sale:
 - The event is coming up the first weekend in May.
 - It supports youth in 4H.
 - It is 100% tax deductible.
 - The show is on Sunday, and the sale starts at 7 PM on Monday.
- Stephanie Teague BEMERr:
 - BEMER works on capillaries to improve blood flow, oxygen, and white blood cells.
 - It is a medical device from Europe.
- Dennis Reitz (Golden Rule Builders):
 - Planning a project takes time.
 - People should send projects their way now for warmer weather enjoyment.
- Paul Klinger (UVA Community Credit Union Mortgages):
 - The market is doing well.
 - The credit union is keeping them busy.
- Kelsey May (Space is Organized and Styled):
 - Offers residential organizing services.
 - Helps clients prepare for moves.
 - Provides electronic organizing services.
- Debbie Jewel (Lots of Basics):
 - Collects gently used clothes for kids.
 - Partners with schools in Prince William County.
 - Provides full wardrobes for children.
 - Starting an exploratory committee of business leaders.

The Speaker's Organization

- The speaker's organization will probably be joining the chamber.
- They have a staff of a thousand volunteers and four part timers.
- They are closed for spring break because they follow the school schedule.
- People can sponsor a child for \$12.50 a month.

Fauquier Support

- They are already supporting every middle school and elementary school in Fauquier.
- Teachers refer through a back door referral partner, which is anonymous.
- They get the age of the child and sometimes their favorite color.
- The children get new underwear from Bombas, who always does black socks.

How to Help

- People can learn about the organization on Facebook.
- Businesses that want to attract families or parents with children can put a box in their business.
- Volunteers pick up, sort, and launder the clothes.
- Last year, they impacted over 2100 kids in Prince William.

Origin

- The organization started in the speaker's neighbor's basement.
- They work with first responders who refer families that have been in a fire.
- They work with all of the CASA kids.
- They are in Fauquier, Loudon, and Fairfax, but don't have the space or money to do as much in Loudon and Fairfax.

Jan Sutton - Sutton Insurance

- Jan Sutton with Sutton Insurance can help with U's including blahs (business, life, auto, and home).
- Debbie helps with youth blahs.

Laurie Bursack - Fauquier Community Theater

- Summer camps are set: Peter Pan Jr. (full), Broadway Junior camp (mainly middle school to high school), and Addams Family (not full).
- The new season for 25/26 is out and opening with Bright Star, written by Steve Martin.
- The holiday show is White Christmas.
- The comedy in 2026 is Dirty Work at the Crossroads, a melodrama with audience participation.

More Fauquier Community Theater Shows

- The next show is Calendar Girls.
- One of their directives is to bring in local talent.
- Their final show is a musical called Tales of the Artisan, written and with music by Matt Moore.

Dennis Donovan - Bowman Gaskins Financial Group

If you know of a person who's been riffed and they're trying to figure out what to do with their retirement, Bowman Gaskins Financial Group can help.

- They are experienced with federal employees.

Judson Walls - Constant Water

- Constant Water systems are battery-powered whole house emergency water systems for homes and businesses on water wells or at-risk public water systems.
- Great referrals are people that you might know or small businesses that you might know that are interested in being better prepared for severe weather, war, and natural disaster events.

Erin Bannister - Countryside Title

- Aaron Bannister with Countryside Title is seeing a lot more business than over the winter.
- Good referrals are home buyers, people who are refinancing, lenders, and agents.

Noah Portugal - NJP Accounting

- Noa Portugal is the president of NJP Accounting.
- They are virtual accountants that specialize in bookkeeping and payroll services for nonprofits, businesses, and personal accounts.

NJP Accounting

- Virtual accountants, completely remote.
 - Team members located in Georgia, Pennsylvania, Richmond, Virginia, and the plains.
- Completely paperless.
 - Any paper received from a client is scanned and returned.
- Bookkeeping and payroll services include:
 - Running payroll
 - Reconciling accounts
 - Tracking financial activities
 - Invoicing
 - Receiving payments and deposits
 - Paying bills
- Works with businesses, nonprofits, and personal accounts.
 - Nonprofits range from \$2-3 million in revenue to those with monthly donations.
 - Specializes in service companies.
 - No longer works with retail due to inventory issues.
 - Personal accounts range from trust fund families to business owners, lawyers, carpenters, young adults, and retirees.

Types of Accountants

- Tax accountants prepare tax returns and maximize deductions.
 - Requires the work of an everyday accountant or bookkeeper.

- Bookkeepers organize and track finances.
 - Provide financial awareness to enable smarter business decisions.
- Services include daily recording, maintaining financial records, and creating basic reports (P&L, balance sheet).
 - Also handles accounts receivables, accounts payables, and payroll versus revenues.
- Goal is to organize information for both the client and the tax accountant.
 - Must adhere to GAAP.

NJP Accounting History and Mission

- Created five years ago.
- Founder previously worked as a bookkeeper and owned a retail store.
 - Returned to school for an accounting degree.
- Mission: "to bring financial awareness in an environmentally conscious way so that our clients can meet their goals while maintaining a healthy work life balance."
 - Remote work allows team members flexibility.
- Vision: "to provide all clients with outstanding concierge bookkeeping services through integrity, organization and technology so that there is financial clarity and awareness."
 - Allows clients to meet current and future needs for success.
- Values: Respect for staff, clients, and the environment, and maintaining high standards of professionalism.
 - "This is serious business and it requires a professionalism that needs to be serious."
- Focus on building relationships with clients.

Accounting Services and Industry Experience

- Services include accounts receivables, accounts payables, basic reconciliations, and creating books.
- Experience across various service companies.
 - Health industry, carpentry, contractors, lawyers, oil wells, churches, fire departments, and government entities.

Software Platforms

- Primarily uses QuickBooks Online.
 - "QuickBooks Online Co Advisors."
- Integrates other software platforms (e.g., Square) for income tracking.
 - Focuses on organizing data for smooth integration.
- "SOAP" acronym for clean accounting.
 - S for savings.

Savings and Services

- Saved clients thousands of dollars through fraud prevention, error correction, and time management.
- Takes over paperwork, allowing clients to focus on family, activities, or business development.

- Database designed for easy and secure access to information, enabling quick retrieval of documents.
- Reconciles finances to the penny, ensuring accuracy and completeness for tax purposes, maximizing deductions and protection.

Fraud and Audit Protection

- Emphasizes the importance of protecting against fraud, as attackers constantly target email passwords to access financial institutions.
- Provides an extra set of eyes on financial activities to identify and address red flags, such as double charges.
- Shares an experience of a client undergoing a Virginia state audit, which went smoothly due to organized documentation.
 - The auditor was given a thumb drive with all necessary information, leading to a quick and efficient audit process.
- Believes the audit may have been triggered by a specific 1099 vendor, highlighting the importance of being prepared for audits.

Team Structure and Expertise

- Clients benefit from a team approach, with multiple team members reviewing and overlapping tasks to minimize errors and identify red flags.
- Duties are split to ensure no single person handles an entire process, promoting accountability and accuracy.
- Introduces key team members and their roles:
 - Heidi: Payroll and sales tax specialist.
 - Emily: Office manager and document specialist, also a poet advisor.
 - Heidi: Data entry.
 - Catherine: Training to become a bookkeeper.

Trust and Referrals

- Emphasizes the importance of trust in hiring for a bookkeeping business.
- Current target niche: fire departments and churches, specifically nonprofits with at least \$1 million in assets.

Types of Nonprofits

- Specializes in nonprofits with endowments, land, or other assets.
- Many of these nonprofits have archaic workflows and systems, so the company revamps everything.
 - In some cases, they assist the treasurer or finance director.
 - In other cases, they are the financial department.
- Will never turn down talking to anybody, also services companies and loves new startups.

Retail Companies

- Tries not to work with retail companies.

- If a retail company has its own inventory system, like a POS system, then they will work with them.
- If the company needs help keeping track of inventory, it can be difficult because QuickBooks is not set up for that.

Consulting

- Does general consulting, like cleaning up books and setting them up for small business owners.
- Typical client has never had QuickBooks.
- Loves setting up QuickBooks, but once handed over, it can be overwhelming for the client.
 - "Really the hardest part of QuickBooks is navigating. There's so many options and it's just too much. And so they end up hiring us."
- Charges a one-time fee for setting up QuickBooks.

Tax Accountants

- Sends data to the tax accountant and is in constant communication with them.
- In many cases, clients speak to the tax accountant through them.
- On great terms with a lot of accountants.

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