

## JACQUELINE M MEYER CPA, MSA

Jackie Meyer, CPA, CCA, and Doctoral Candidate is President and Founder of Meyer Tax Consulting LLC, in Southlake, Texas. Her team works with a select number of executives, investors, entrepreneurs, and small businesses throughout the year on tax preparation, planning, and accounting service packages.

Her team spans from Texas to Hawaii while being 100% virtual. She is a top-rated speaker and one of few female thought leaders with over 4,000 members in her Accounting Firm Influencers Facebook group. As thought leader, she is recognized by CPA Advisor as 40 under 40 winner each year since 2018, 2019 AICTC Tax Planner of the Year, 2021 AICPA Practice Management Committee Member, and a proud participant of Intuit Tax Council 2016-2019. Her passion for combining technology with unparalleled client service came to light at age 27 as one of the youngest female CPA firm owners in DFW.

Giving back is her top priority, so she works with local and global nonprofits on educational and equality initiatives. Jackie also has two children, three dogs, and a loving husband, Mark, with whom she attends Life Church and travels the world as much as possible. During COVID-19, she created TaxPlanIQ, a SaaS software which she calls her third child.



## AS SEEN AT



## EDUCATION

**Current** Doctorate in Strategic Leadership  
Regent University

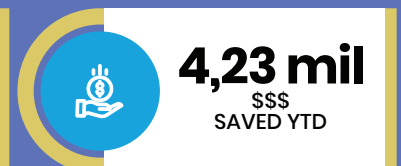
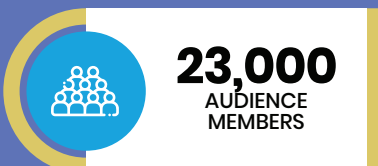
**2008** Master of Science in Accounting Southern  
Methodist University, Dallas, TX

*Dean's List, Golden Key Honors Society and Finance  
Society, Big Brothers & Big Sisters Program*

*Study abroad - Southern Spain Language and  
Culture, Costa Rican Business Practices*



## STATISTICS



## SPEAKING TOPICS

- **The ROI Method** – Accounting for your tangible and intangible value to anyone, anytime to sell itself.
- **Tax Planning Topics** – Adding valuable advisory services to an accounting firm.
- **Business Best Practices** – Competitive edges, standardizing processes
- **Boundaries** – In life and work, for mental and physical health.
- **Equality** – Treating everyone the same based on their talents and strengths versus their gender, ethnicity, or race.
- **Innovation** – Being a true entrepreneur versus technician or manager in a business, being a SAAS founder, coach, and CPA firm owner from nothing.
- **Giving Back** – Ways to feel like you are a blessing everyday to others, and charitable method that win with a team.
- **Faith** – How a shy accountant doesn't shy away from the limelight to inspire.
- **Leadership** – The latest scholarly proven methods to lead well from my doctorate program and leading over a dozen on my own team.
- **Grit** – Hope will always win.

Hear her inspirational story of overcoming adversity to be a nationally recognized virtual CPA firm, coach hundreds of accountants with her Certified Concierge Program, and becoming a SaaS founder of TaxPlanIQ, from her home with two young children.

## PROFESSIONAL ACCREDITATIONS

- Pursuing Doctorate in Strategic Leadership from Regent University
- CPA in the state of TX (#94301)
- GRACE Grapevine Auction Committee Volunteer
- Pearson Foundation Board Member
- Former Chamber of Commerce Finance committee volunteer



## TESTIMONIALS

"This presentation was fantastic! It was absolutely filled with valuable information. Thanks Jackie. As always, you delivered!!"

**Larry Witcher, CPA**

"Best 60 minutes I have spent in a long time. Well worth knowing this information."

**Val Benincosa, CPA**

"What a fantastic presentation!! Jackie's enthusiasm and knowledge about the course lifted the course to another level."

**Yvette Tucker**

"I appreciate the presenter and CPAacademy offering timely, current and up-to-the-minute training."

**Val Benincosa, CPA**

