

EPISODE 193

SMALL BUSINESS CUSTOMER SERVICE: KEY COMPONENTS FOR SUCCESS

SYSB PODCAST WITH

HECTOR CASTANEDA



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WITH HECTOR CASTANEDA

In this podcast episode, Jillian Flodstrom interviews Hector Castaneda, a financial expert who has more than 10 years of experience in Fortune 200 companies. Hector discusses the key components of customer service in the financial industry, which includes finding a good fit with a client and being transparent in communication. He also emphasizes the importance of chemistry between a client and their CPA. Hector suggests that CPAs should assess their clients and determine whether they are a good fit, and also advise clients to find a CPA they can have a long-term relationship with. He also provides tips on how to choose the right CPA, including looking for someone with experience in your industry, reading reviews and asking for references. Additionally, Hector discusses the importance of maximizing tax strategies, and shares his thoughts on tax planning and the changing tax landscape. Finally, he offers advice on how to build wealth, including investing in stocks, real estate and education, and developing a savings habit.

Financial management is a critical aspect of life, and finding the right expert to help manage your finances is essential. In the podcast episode, Jillian Flodstrom interviews Hector Castaneda, a seasoned financial expert with over 10 years of experience in Fortune 200 companies. Hector shares his insights on the essential components of customer service in the financial industry, emphasizing the importance of finding a good fit between a client and their CPA.

As Hector points out, chemistry is a critical aspect of the relationship between a client and their CPA. A good CPA should be able to assess their clients and determine whether they are a good fit. Furthermore, clients should also evaluate their potential CPA to ensure that they can develop a long-term relationship.

Choosing the right CPA is a daunting task, but Hector provides several tips that can help make the process easier. For example, clients should look for a CPA with experience in their specific industry. They should also read reviews and ask for references to gain insight into the quality of service provided by the CPA.

Tax planning is another essential component of financial management, and Hector provides valuable insights into how to maximize tax strategies. With the constantly changing tax landscape, it is vital to stay up-to-date on the latest tax laws and regulations to make informed decisions. Hector stresses the importance of working with a CPA who is well-versed in tax planning to help navigate the complex tax system.

Finally, Hector offers practical advice on how to build wealth. He emphasizes the importance of investing in stocks, real estate, and education to create long-term wealth. Developing a savings habit is also critical, as it provides a financial safety net and allows for future financial planning.

In conclusion, financial management is a crucial aspect of life that requires expert guidance. The podcast episode with Hector Castaneda provides valuable insights into the essential components of customer service in the financial industry, choosing the right CPA, maximizing tax strategies, and building long-term wealth. By following these tips, individuals can take control of their finances and build a secure financial future.

KEY TAKEAWAYS



- ✓ **Customer service** is key in the financial industry.
- ✓ CPAs should **assess their clients** and determine whether they would **be a good fit**.
- ✓ Choose someone with **experience in your industry**, reading reviews, and asking for references.
- ✓ Make sure to **maximize tax strategies** and plan for your taxes and the changing tax landscape.
- ✓ Keep investing in **stocks, real estate, and your education**. Keep building a good savings habit as a **key component of building wealth**.
- ✓ **Transparency in communication** with clients and maintaining a good relationship with them as a CPA is crucial.
- ✓ **Building a long-term relationship with your CPA** and maintaining regular communication with them to maximize the benefits of their services.