
SAMPLE OUTLINE AND SCRIPT
(60+/-) Minute Accounting Careers Presentation
Florida Institute of CPAs
Elementary School, Grades 3-5



Rev. January 2013

BEFORE THE PRESENTATION

- Ask the grade level(s) of the audience.
- What is the process for visitors like parking, background checks?
- How early should you arrive to the school?
- What audiovisual is in the classroom that you can use?
- If bringing handouts or giveaways, how many do you need?

Presenters: Please personalize this to your situation, experience, time allowed, and audience. You want the presentation to flow naturally, show your interest in the students, and reflect your passion for your career.

Learning Objectives:

The purpose of this lesson is:

1. To introduce students to the accounting profession by describing your job as a CPA and sharing why you chose accounting.
2. To reinforce that mathematics is a necessary and critical “skill for living”.

Key Points:

1. People (including students) use accounting principles every day (like computations using the four basic math operations, financial analysis, cost comparisons, budgeting, saving, investing, financial decision making)
2. CPAs help people – that is their job! They help people and companies manage their money, give them advice on financial situations, and more.

Presentation Pointers:

- Be yourself
- Have fun
- Allow the students to have fun, too
- Engage the students as much as possible
- Smile, be cheerful

Getting Started

Introduction

- Smile ☺, relax

- Thank the teacher for inviting you to speak today.
- Introduce yourself (if teacher has not already done so). I am <your name>, CPA, <parent of student, relative, other>. Write your name on the whiteboard.
- Tell where you work
- Let them know you're glad to be there.
- State that you are here today to talk about careers in accounting and to answer any accounting career questions they have
- Encourage them to raise their hand and ask questions at any point during the presentation

Give an overview of your presentation.

Today you will learn about ... (customize to your presentation)

- What CPAs do
- Why math is so important

Describing Your Job

Does anyone know what an accountant is?

Who can tell me what CPA stands for? (get several responses)

Write "CPA – certified public accountant" on the whiteboard.

Does anyone have a CPA in their family? Like father, mother, brother or sister, aunt, uncle? Where do they work? Do you know what they do?

Does anyone remember Arthur from the PBS television show? His father was a baker. What did his mother do?

(His mother is a CPA)

What do I do?

Briefly describe in simple terms what you do. Give one or two examples (storytelling style) of how you helped someone, your organization, or a business. Example – Last week I helped a grandmother who lives alone ... She was having difficulty with ... We worked together to do ... Now she is better because ...

Open the floor to questions about your job, why you chose it, how you prepared for it. Keep your answers simple! Avoid using accounting jargon!

Through describing your own job, point out the advantages of being a CPA like:

- Work environment
- Salary
- Travel
- Other

Who makes a good CPA?

People choose accounting as a profession because they:

- Are organized
- Like math
- Like helping people
- Like solving problems
- Like to work with people
- Other

Describing the Profession

Who uses accounting services? (we all do, see below)

One thing I do is help businesses (like McDonalds, Wal-Mart, Apple) record their daily sales and expenses.

For example, I add up all of their sales – which is when you and I buy something and give them money. What are some examples – products and services – of how stores and restaurants make money? (get responses) This is their REVENUE.

Then I subtract their expenses – which is what they pay their employees/workers; and pay for the items they are selling to us. What are some examples of EXPENSES that a store and restaurant would have? (get responses)

Ask the students to think of a fun business example (pet store, ice cream shop, etc.). Now ask them to help you calculate the revenues and expenses. How much would we have to sell? What type of costs would we have? Help them to understand how Revenues minus Expenses equals Net Income (profit).

Now one of my other jobs is to not only help businesses but I help people like your Moms and Dads and <teacher's name>. I can help them manage their money.

Do you use accounting?

(Let them ponder that for a moment and ask for examples.)

All of us use accounting and we use it every day!

Importance of Math

What are some other reasons why you need to know math?

This year in <teacher's> class you are learning the very skills you need to be an accountant when you grow up. You are learning to add, subtract, multiply, and divide.

These skills - add, subtract, multiply, and divide - are the same math that CPAs use when they help other people. CPAs might use bigger numbers or more numbers but they do the same type of math problems you do in class.

You also need to know math for other reasons, too.

1. Make sure you get the right change back at a store. If you gave \$4 for a meal at McDonald's that costs \$3.80 – how much change should you get back? Sometimes the register person makes mistakes so you want to double check the amount of money that is given back to you.
2. Look at the clock in the morning and calculate how much time you have to get ready for school.
3. If you are holiday shopping for your parents you need to be able to calculate how much money you can spend on each gift. For example, the gift you want to buy costs \$18.00, but it is on sale for 25% off. How much should it cost?
4. Verify that the price being scanned in is what you thought it should be. Sometimes scanners in stores are not set correctly. Has this ever happened to any of you?
5. How have you used math today (outside of school)? (get several examples) For example, you want to buy a skateboard that costs \$50, but the sales tax is 6%. How much is your skateboard going to cost?

To become an accountant, I had to learn all of my multiplication tables, learn how to divide, and practice lots of adding and subtracting. So keep up the good work on the math practice sheets and homework that your teacher gives you.

Provided by:

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