

*"Today, by mistake, I attended your seminar: Leveraging Leadership through Improvisation. As you may have noticed, I arrived late because I was supposed to attend another class. Regardless, I decided to stay, and I am extremely grateful I did. **Without doubt, your presentation was the most engaging and valuable seminar I have attended in 30 years of practice.** Your use of volunteers to participate and convey communication concepts was extremely effective. Your patience and polite prodding to engage volunteers reinforced the effectiveness of the seminar."*

—Conrad Giedt, CPA, Attendee at the CCH Users Conference, October 2015

## PETER A. MARGARITIS, CPA

**PETER MARGARITIS** is an author, keynote speaker, trainer, and CEO of The Accidental Accountant, an organization committed to helping business leaders strengthen their business success skills and to create positive results.

Over the past 30 years, Peter has managed, recruited, developed, hired and even fired individuals – he knows firsthand how to develop successful teams. He has sold products ranging from bank loans to corporate incentive certificates. In addition, he has created compensation matrices; analyzed financial statements; designed and delivered accounting and professional skills courses. In addition to his extensive expertise, audiences will enjoy an informational address from an accountant who has performed stand-up and improvisational comedy.

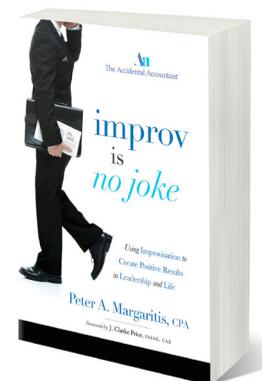
Through his experiences in business and training in improvisational comedy, he brings a fresh perspective and approach on how to develop non-technical, professional skills training like Presentation Skills, Business Development Skills and Leadership Skills. With every client his goal is the same: **Use Improvisation To Create Positive Results.**

As a speaker and trainer Peter has delivered hundreds of seminars, conferences, workshops, and keynotes on both technical and non-technical topics to clients that include Fortune 500 companies, large and national regional accounting firms, state CPA associations and the American Institute of CPAs. In addition, he currently teaches select courses for the American Institute of CPAs and The Mind Gym.

### Expert Topics

Coaching, Communication, Humor, Leadership, Presentation Skills

In his recently published book, *Improv Is No Joke*, Peter teaches business professionals how to become more effective, sharpen their creativity, and develop leadership skills needed to succeed and improve business results through improvisational techniques. Focusing on strategies such as replacing negative phrases and listening to understand, will help you successfully relate to and communicate with clients and colleagues.



### eSpeakers Profile Video Library



## BOOK PETER FOR YOUR NEXT EVENT

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## PETER A. MARGARITIS, CPA

### Keynote Speaker, Author, Trainer & Chief Edutainment Officer

**Leveraging his business expertise and love for performing improv**, Peter offers business professionals an extremely unique and engaging point of view. For the past 30 years, Peter has managed, recruited, developed, hired and even fired individuals – he knows firsthand how to develop successful teams. Having recognized a need for improved communication among business professionals, he offers consulting and training with his company, The Accidental Accountant which helps business leaders strengthen their business success skills - creating positive results.

Peter leverages his business expertise and love for performing improv in his new book, *Improv is No Joke*, a must-read guide for business leaders looking to become more effective, sharpen their creativity, and develop leadership skills needed to succeed and improve business results through improvisational techniques. Focusing on strategies such as replacing negative phrases and listening to understand, will help you successfully relate to and communicate with clients and colleagues.



Peter earned a BA from University of Kentucky and a Master's in Accounting from Case Western Reserve University. He is a CPA and Certified Global Management Accountant. He has worked for companies such as Price Waterhouse, Victoria's Secret Catalogue (not as a model), Gap Inc. Direct, Barnett Bank, C & S National Bank, Franklin University, and Ohio Dominican University.

He is a member of the American Institute of CPAs, Georgia Society of CPAs, Ohio Society of CPAs, and the National Speakers Association. He is also a former member of the American Institute of CPAs governing council and a past chair of the executive board of directors of the Ohio Society of CPAs.



*"Peter came in and spoke with our Finance group at Bridgestone Americas Inc...he presented in a surprisingly refreshing manner that was actually very fun and informative. **His ability to have fun and add humor to the subject is what made him night and day different than many other speakers I have heard over the many years I have attended such events.** He has his concept and moniker down pat..... Chief 'Edutainment' Officer. I highly recommend Peter if you are looking for someone to come and present a presentation for CPE opportunities or motivational team building. I certainly hope he has an encore with our group in the near future! Carpe Diem!"*

*– Keith O. Wilson, CPA, CFE, CGMA, Fraud Examiner, Bridgestone Americas Inc.*

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EXPERIENCE

# PETER A. MARGARITIS, CPA

Keynote Speaker, Author, Trainer & Chief Edutainment Officer



For a full list of speaking clients and additional testimonials check out the 'About Peter' tab at [www.petermargaritis.com](http://www.petermargaritis.com)

### What business professionals have to say about Peter Margaritis

"Highly recommended"

"One of the best CPE courses"

"Dynamic and passionate!"

"Outstanding speaker with a creative and very personal approach"

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### **Improv Is No Joke**

#### *Using Improvisation to Create Positive Results in Leadership and in Life*

Drew Carey's television show *Whose Line Is It Anyway?* has turned improvisational comedy into a pop culture phenomenon. But Peter Margaritis knows firsthand that improv is more than just laughs—it's a valuable training tool that can make anyone a more effective business professional. It's not slapstick—improvisation is a way of life. It's going with the flow, adapting, and adjusting to the unexpected and to your audience.

As an author, speaker, educator, humorist, and the founder and self-proclaimed chief "edutainment" officer of his own company, The Accidental Accountant, Peter will share with you how two little words changed his life and can infinitely improve your business's success. He will also show you to really listen to your clients to build rapport, trust, and loyalty.

### **Embrace Your Inner Superhero**

Leadership demands many different skills and traits such as communication, listening, accountability, inspiration, creativity, passion, focus, and leading by example. As leaders, we must bring our superhero to work with us everyday in order to achieve our goals. What happens if your inner superhero takes a week off – or even a day? How productive and profitable are you and your team? How does this affect your personal time or family life?

By using the principles of improvisational comedy, I will demonstrate how you can unleash your inner superhero on a daily basis and maintain high energy and productivity at work and at home. The typical audience for this keynote includes accounting practitioners, auditors, analysts, firm administrators, and finance professionals.

### **Leveraging Leadership Through Improvisation**

In today's business climate, successful leaders need the ability to communicate their vision and their ideas, along with having the ability to adapt to the changing business landscape and work within an arena of uncertainty, all the while, moving forward. Successful leaders possess these qualities: respect, trust, support, listen, focus, adapt and have a YES AND attitude.

These are the same qualities that successful improvisers possess. Successful leaders and improvisers can think-on-their-feet, process information quickly, make their teammates look good, see different perspectives, be creative and innovative, and make significant connections for the good of the team.

[Visit Peter's YouTube Channel](#)

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## Communication Courses

### Tips and Techniques on Public Speaking and Presentation Skills

Jerry Seinfeld once said that at a funeral, most people would rather in be in the casket than giving the eulogy. America's greatest anxiety, public speaking, is a necessity in today's business world. Those who can speak in front of crowds and have effective presentational skills tend to move up the corporate ladder more swiftly. Peter Margaritis, CPA, CGMA will help you break through the fear so you can stand in front of an audience, project confidence and knowledge, all the while making a connection and capturing your audience's imagination.

### Communicating in the Workplace

How you communicate with your clients can make or break your career! We will discuss different client's personality styles and demonstrate the different ways to communicate information to them. See how recognizing their personality style(s) can turn communication breakdowns into breakthroughs.

### Tips and Techniques on Building a Stronger Professional Network

Networking is one of the most powerful tools professionals can develop, but it takes time, energy and commitment in order to build a strong network. Peter A. Margaritis, CPA, CGMA will discuss various methods in building, developing and cultivating your network. In building this strong network we need to also consider how to effectively leverage social media. Having a strong network will assist you in launching a new idea or plan, develop new business and clients, reduce costs in recruiting, and leveraging your career.

### Tips and Techniques on Developing New and Existing Business

In today's competitive market, business development is critical to survival. Business development can be defined as "attracting new business and retaining quality business." This is a challenging task and one that requires knowledge, experience, patience, and a plan. Peter Margaritis, CPA, CGMA will demonstrate that business development does not happen overnight, it is a process of developing relationships over time and having a plan in place in order to achieve your goals. During this course you will develop your own business plan for the coming year.



*"Pete is a terrifically funny and relevant speaker and coach. You find yourself having so much fun you don't even realize your learning so much along the way! I highly recommend using him to educate your employee base on a broad range of managerial skills while accomplishing some true team-building."*

— Tammy Dosch, CFO, Capital Square, Ltd.



## Leadership Courses

### How to Dump SALY and Find a New Creative Approach to Accounting

Are you stuck in a rut of “Same As Last Year” and missing potential opportunities or not asking the right questions and missing potential areas of risk? This course will demonstrate proven methods that accountants can use to unlock their creativity and innovation. You will discover new ways to break through mental barriers, SALY thinking, and roadblocks in order to improve performance, creative thinking, and innovation. This is a lively, interactive and hands-on course that you can apply the techniques learned immediately.

### Leadership From a Slightly Different Perspective

Leaders create growth in their companies and in others through their vision, passion and integrity. If you are serious about becoming a more effective leader, but ready for a slightly different perspective, this fun and unique class is just what you are looking for. Peter Margaritis, CPA, CGMA will discuss how to incorporate the principles of improvisational comedy into your own personal leadership style.

### Building Stronger Teams by Using Improvisation

The skills needed to perform improvisational comedy are the same skills and principles that are used in building successful teams. Improvisation is based on the principles of: trust, respect, support, adaptation, listening, and communication. The question many managers and owners are challenged with today is how to develop and foster a team environment that leads to organizational productivity and profitability. “Building Stronger Teams by Using Improvisation Comedy,” a high- energy and interactive workshop that will help you and your team learn how humor and improvisation can lead to successful teams and ultimately a more productive and profitable business.



*“Pete was a presenter at the Tennessee Society of CPAs state convention...He had the Friday morning 8AM slot and **did a sensational job of getting the 120 or so CPAs fired up.** I do not want to spoil his presentation by disclosing what it was so I’ll just say that one of his take aways was the best I have had in a long time. My comment to Pete was ‘Keep it up...You are making a difference in people’s lives’ ”*

*— Laimon Godel, CPA, CGMA, at LW Godel, Jr, CPA PC*

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**Seminars can be customized according to your organizational needs. Just tell Peter what your focus is and he can help build a meaningful program for your audience.**

### **How to Identify, Explain, and Present Pertinent Financial Information to Non-Accountants**

Do your business associates and/or clients have difficulty understanding the financials. Are they making decisions without comprehending the financial impact of their actions. They frequently “smother in detail and crave for knowledge.” This high-impact interactive full-day program is loaded with practical ideas and techniques to help associates and clients make better business decisions. Financial Information is one of management’s most useful tools, yet far too many non-accountants are unable to read financial reports and use this information to enhance performance.

### **Train the Trainer**

The goal when speaking to any audience is to transfer information in a manner that will inspire the audience member to act on your words and to retain the information. This course will focus on adult learning practices which are the opposite of a lecture-based learning environment. The best way to succeed is to view all presentations as a conversation with the audience—engaging, entertaining, and educating.

### **The 8 Hour MBA**

If you don’t have the time to complete an MBA degree but still want to understand the key concepts then this full-day seminar is for you. We will discuss concepts that you don’t see in an MBA program but are essential in the business world as well. These seminars are designed for managers, professionals, and business owners who want to develop a broad perspective to deal more effectively in today’s rapidly changing and increasingly complex business environment.

Participants will gain a high-level but thorough understanding of the key elements and components of a traditional MBA. Learn to look strategically at an organization from a holistic perspective to improve business planning and decision-making. Understand how different business processes drive results. Learn the effective use of key performance indicators to motivate, measure, evaluate, and improve results.

There are five recommended threads within this seminar. Within each thread are six different topics. Customize your 8 Hour MBA by selecting any 6 of the 30 available topics. See next page for details.



*“The **passion and commitment** you have for your business definitely shows through. It’s obvious you take pride in the development and refinement of the content.”*

*—Steven Dezenzo, Manager—Finance & Accounting, FedEx Custom Critical*



**Seminars can be customized according to your organizational needs. Just tell Peter what your focus is and he can help build a meaningful program for your audience.**

### The 8 Hour MBA Seminar Continued...

#### Adding Value

*Getting the most by giving the most.*

- Financial Analysis
- Fraud
- Negotiating
- Budgeting & Forecasting
- Business Law
- Disaster Recovery & Business Continuity Planning

#### Business Strategy

*Thinking, planning, acting, and leading.*

- Risk Assessment
- Strategy
- Sustainability
- Creativity & Innovation
- International Business
- Marketing

#### Leadership Strategy

*Taking people to new places and higher ground.*

- Teamwork & Building High-Performance Teams
- Emotional Intelligence
- Entrepreneurship
- Decision-making
- Governance
- Leadership

#### Performance Management

*Getting to better results, faster.*

- Balanced Scorecard
- Customer Experience & Customer Service
- Change Management
- Performance Management
- Project Management
- Process Improvement

#### Powerful Communications

*Conveying meaning and earning an audience.*

- Personality & Communication in the Workplace
- Social Media
- Presenting Financial Information
- Public Speaking & Presentations
- Effective Writing
- Networking

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## Backpack to Briefcase

### *Essential Skills for Professional Growth Within Your Firm*

When your new hire joins your firm, they are like a deer in the headlights. They are transiting from the college campus to an office environment and have no idea how to navigate the turbulent waters of the business world. These new hires spend their first four to five years learning as much technical accounting as possible. However, by the time they become a manager and now have to manage people and develop new business, once again the deer in the headlights look with a steep learning curve. My philosophy is that in those early years, your new hires need to begin to develop those professional skills (aka. soft skills) so that the learning curve in year five has flattened out and they are more productive to your firm.

I provide your firm the following curriculum for staff development that is designed to provide your young staffers with the essential skills for professional growth. In addition, I provide quarterly reinforcement to insure that the material is understood and applied properly.

#### Year 1

Professionalism & Business Etiquette  
Career Development

#### Year 2

Tips and Techniques on Building a Stronger Professional Network  
Communicating in the Workplace

#### Year 3

Tips and Techniques on Developing New and Existing Business  
Building Stronger Teams by Using Improvisation

#### Year 4

Tips and Techniques on Public Speaking and Presentation Skills  
Leadership From a Slightly Different Perspective



*"Peter spoke at our Association for Accounting Administration Ohio Chapter meeting. Peter's use of humor and interactive exercises helped us better understand the thought processes of CPAs. **Peter provided communication tools to us to use to improve our communication with others** and to also alleviate stress in our daily lives. The session wasn't over when Peter's presentation was finished. Attendees of the meeting gathered around him for some more gems of information! If you are in need of a speaker who can unleash your 'Superhero,' be sure to contact Peter."*

— Marla Martin, Firm Administrator, Weber Obrien LTD.

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