

Interview of Candy Martin 11/30/2025

Interview Financial Professional

Candy Guimont-Martin is a financial educator and tax professional currently working in the accounting field.

My bio lays out a multifaceted background that includes financial education, tax preparation, and work as a licensed life and health insurance agent. My experience provides a broad perspective on how accounting interacts with personal finance, tax law, and financial risk management.

[Candy's Bio](#)

Background and Experience

My 26 year career began with tax preparation, which eventually expanded into financial education, business advising, financial planning, which includes offering insurance and investment services. Over time, my team and I built expertise not only in tax compliance but also in guiding clients through budgeting, retirement planning, and financial/business risk mitigation. We truly teach people how their money works by providing financial education before rendering any services.

[A Podcast Interview of How I Got Here](#)

Day-to-Day Responsibilities

Firstly, I offer year-round tax services- where my staff and I prepare and audit tax returns, analyze financial statements, hosting strategy sessions with various clients with a very diverse set of situations. I like to believe the key to my success is listening to clients, educating them and putting together plans that they will commit to.

In between tax filing, we also offer year round financial education workshops, conduct financial needs analysis with clients, and help implement the financial blueprint created. Even with all of our financial expertise, education and experiences, walking the clients through the process offers the best learning hub for me as a forever student of finances- I love this stuff! The not so fun but necessary things are keeping on track with continued education metrics required to keep my licensing active, learning some new platform and educating myself on the current revised tax law, that's never ending, but helping clients improve their quality of life make this all worthwhile.

Why I Chose This Field

This was not taught in schools and so many adults make catastrophic money decisions because they don't know or don't know the value of financial education. This is a rewarding and very profitable field- everyone can be smarter with their money. (and I can take so many different avenues with my credentials- no shortage of opportunities).

Educational Path

- Degrees: Associate of Science in Business & Marketing
- Licensed Life and Health Insurance
- Certified Tax Professional
- Leadership Education
- And countless continued Finance & Business education courses

Advice for Someone Just Starting Out

This part is courtesy of Google- I'd only add, get some real life experience:

When asked what advice they would give to someone beginning their accounting career, the professional offered several key insights:

1. Build a strong foundation in accounting fundamentals. Even if you specialize later—tax, audit, financial planning, insurance—your success relies on understanding the core principles.
2. Develop communication skills. Accounting is not only about numbers. It's about explaining financial information clearly so clients or coworkers can make informed decisions.
3. Stay curious and keep learning. Tax laws, software, and financial regulations change frequently. The most successful professionals are those who view learning as ongoing.
4. Gain practical experience early. Internships, entry-level jobs, or volunteering during tax season can provide hands-on knowledge that textbooks cannot match.
5. Be ethical and detail-oriented. Clients, employers, and regulators rely on accountants for integrity and accuracy. Reputation is everything in this field.
6. Don't be afraid to explore different paths. Accounting offers many directions—public accounting, taxation, financial analysis, auditing, insurance, and more. Exposure to different roles helps you discover what aligns with your strengths.

I appreciate the opportunity to assist you with your assignment and hopefully you'll schedule some time to shadow me and my team- I promise it will be exciting!

Candy Guimont-Martin...