



2018 Ones to Watch: Jed Dallek, Partner at Gettry Marcus CPA, P.C.

May 15, 2018 - Spotlights

Name: Jed Dallek

Title: Partner

Company: Gettry Marcus CPA, P.C.

Address: 1407 Broadway, 40th Fl, New York N.Y.

Year that you entered your current field? 1980

Who or what do you attribute to your success?

Always caring about the client/person first has been my biggest attribute. Clients take for granted that you are knowledgeable in your field. Clients don't care how much you know until they know how much you care. It has proven to be very successful during my career. I am often asked what I do in the accounting field and my response is often met with surprise. I tell them that I spend over half my time being a psychologist and consulting about family matters and business succession. How the next generation can be integrated into your business and how to structure a business for multi-generational families. The clients understand that you understand what they really need, and you care about them!

How do you motivate or inspire your colleagues?

I try being honest and upfront to a fault, no sugar coating. Today's generation, as well as clients, want to hear what you think. They don't pay you to hear what they want to hear. If you can relate real life stories to their situation it helps inspire and motivate people.

I have a few books that I recommend for reading that have helped me tremendously over my career. "The Trusted Advisor" is a must read for anyone who wants to be understood by clients. I also recommend "An Unfinished Life," which is the real-life story of JFK (Written by Robert Dallek) that gives the perspective of what makes a true leader and how one can overcome adversity.

How did you get your start in your current field?

Like many of my colleagues, I started working for my father who had an accounting practice. He started his business of our house in Brooklyn, which eventually grew to over 60 people and moved out to Long Island. I started working at his smaller clients when I was in college to earn money for school. I did all the write up work by hand, which included the cash receipts, cash disbursements, general ledger and trial balances. I was responsible for all the payroll and sales tax and corporate tax returns. I also collected the monthly fee before leaving. This was the best experience anyone starting out in the accounting field could have. I learned more than any textbook and still learn from this experience today. I feel sad that today's graduate will never get this type of experience.

How do you manage the work/life balance?

I did not learn this ability until recently. You must take time for yourself. I play racquetball with clients once a week. It gets the blood flowing and you really learn a lot about people when you put them in a competitive environment. I play Texas holdem once a week with friends (some of whom are now clients) for giggles and laughs. It helps clear the mind and I win infrequently. A gym in the house also helps with early morning workouts. The rest of my free time is spent with my wife and pit bull, usually separately. If I am disciplined with the life balance it helps become disciplined with work as well.

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