



John Curzon

IR Global's exclusive advisor for Crypto & Digital Asset, Tax (Accountants) and Transfer Pricing in Oklahoma since 2016

Culture of care: why John Curzon's hugely successful accounting firm is much more than just balance sheets and tax returns

John Curzon is a people's person at heart. He's a community philanthropist and a firm believer in a culture of care, as well as a detailed tax strategist and business valuation expert who future-proofs his clients' companies by micro-analysing their business lifecycles.

His tax and business expertise are the culmination of years of practice with business partners Terry Cumbey and Eric Kunkel. It's at CCK where John, Terry and Eric developed a unique proposition for clients that goes way beyond traditional accountancy models. Indeed, CCK's 25+ years of double-digit growth is a testament to how each of them developed their own path to success, which they have then transferred on to their newer partners, staff and clients.

Mentoring and leadership

When he's not developing successful strategies with his clients, John works closely with CCK's partners to constantly tweak and develop the firm's business growth and strategic direction. As a founder of the firm, he believes leadership and mentoring are critical for a successful business – for both CCK and his clients.

"When not working on client strategies, much of my time is spent in a leadership role," he says. "My focus is to make sure everyone gets the big picture of the firm. That tends to occur in every conversation, whether discussing a client or in a career development coaching setting. At CCK we have an Executive Committee that is responsible for the strategic vision and overall operation of the firm. But we also have younger partners who are an integral part of the CCK Strategy Team. That Strategy Team looks at where the firm is going and what it is doing, and asks the question: 'does that match up with our vision.'"

Along with that leadership role, John works closely with clients to understand the fundamentals of their business operations: "Along with our own business strategy, I take a similar one with clients. I spend most

of my time in meetings with them, helping them work through their issues, their problems, explaining to them a particular strategy that we might have suggested to them or deployed for them."

John began his career as an auditor with a large national firm and soon developed a knowledge of technical tax law. He continued his quest for learning with certifications for business valuation.

"I have my business valuation credentials along with my merger & acquisition advisor credential. I've spent most of the last 15 years taking all those skill sets and pushing them together into an advisory business. It is a skillset that really focuses on future value. It's that future value that lets me think ahead, to anticipate problems, and give clients a path or even multiple options to pursue."

Focus on future value

"Instead of reacting to something that's already happened, how can I cause something to happen for a client? Or what kind of strategy could we create that considers all these different skill sets and then applies to a client's particular situation for purposes of improving their economics?"

John's ideal clients are business entrepreneurs. They could be owner-managers of start-ups or running mature companies looking at M&A opportunities or an exit. One of the early start-ups John worked on was owned by his son: "Working with start-up companies really started with my son, who had an idea and decided he wanted to start a business. That time allowed me to help him go through the business process – what it means to be a high growth start up business."

"These days most of my new clients are business entrepreneurs who are starting a new business or have mature businesses that need a fresh look at what their goals are and how to achieve those goals. We use valuation techniques to identify what drives the profitability in their business and how best to structure their entire enterprise. Clients need to

understand the value of their business to further their growth strategy.”

John also helps clients with succession planning: “Perhaps they have key employees or their own children in the company that they want to pass the business along to. What’s interesting about that is explaining the components of a succession plan are unique to each business and there are unique tax rules that can facilitate the process. You’re not just stuck with one solution; you have different choices. Most people don’t understand that. They think they have to sell their company in order to exit. Well, that’s not necessarily true.” Identifying the need for a financial ownership plan must be accompanied by a plan for management succession as well as leadership succession. Just being an owner is not enough.

Different lifecycles of a business

One of the key factors to understand where a business is headed is to find out about the different lifecycles the business has already been through. John has learned a lot from CCK’s own business lifecycles as the firm has grown and he’s applied this to his clients. Recently, CCK celebrated 25+ years as a high growth, successful business – none of which came about by luck or chance but by the application of the firm’s knowledge of business lifecycles.

“In our 25+ years we’ve had double digit growth the entire time,” John says proudly “We’ve always grown, and I would say that has become part of our culture because without growth you’re really going to slip back and accept the status quo. I would say we’ve never accepted status quo. We’ve always thought, ‘No, we want to find out what’s the next great thing that we can do and what else do we need to learn? What other things can we do?’”

John, Terry and Eric’s original analysis of business lifecycles, valuation and tax issues helped them to realise their unique business proposition could be sold as a service: “We knew we had something to offer that was not really typical of an accounting firm and that’s mostly related to focusing on not what we can do, but what the client needs. That was really the key to our success – and the success of our clients.”

International networks and IR Global

One area that has been particularly successful over the years has been their work with international businesses. With the help of the IR Global network, John has worked with several international companies eager to set up in the US. But setting up in the US is only half the story as John has then gone on to help them with their business and growth strategies at a global level.

“We’ve helped international companies establish a presence in the US and also analysed their organization and how they’re structured. This includes looking at opportunities in their own jurisdiction and how that could improve their business from a tax and economic position.

“We’ve had several situations where one business was from a country that did not have a tax treaty with the US. And so, we were able to work with one of our colleagues through IR Global in the Netherlands that enabled this particular client to minimize their tax exposure worldwide. It wasn’t just in the US or just in their home country, but worldwide.”

The Sinchi Foundation

John admits that the relationships he’s built with IR Global go far beyond traditional business networking. He’s also proud of his early involvement with the Sinchi foundation (run by Tom Wheeler, IR Global’s founder), which supports indigenous peoples throughout the world.

“When Tom first brought this to our attention and was looking for members who wanted to support it, the question was ‘of course, why would I not do that?’ Being part of IR Global for me is being part of that responsibility to jointly do things together to help our global community.”

“That also fits so much with our own communities we’re involved with. Eric has been very involved with the local food bank and my involvement has been with an organization called Junior Achievement. This is a nationwide program in the US to teach entrepreneurship, work readiness, and financial literacy.

“It’s teaching these kids about business effectively as they’re growing up, from first grade through high school. We also support many other organizations and other charities in our community, financially and with our time. Each year, instead of holding a holiday party just for ourselves, we go to a local charity and provide service to them. Win-win!”

Commitment to community

This commitment to community work and engagement is also not lost on CCK’s clients: “It’s very much a culture of care. We care about our community, our clients and we care about each other. And that’s the overall culture we like to promote.”

This also goes into a virtuous full circle. The core values of CCK underpin everything the Founders do, which is then transmitted to the staff and the clients: “We talk about being goal oriented, for our staff and our clients. It goes back to those questions, what are their goals? And then focusing on those so that they can be achieved. Well, they’re only achieved if they get results. We’re results driven, we want to have results and we’re very persistent about that.

“An answer to something always means there’s a better answer and you just must keep looking and don’t accept the first answer that comes along because it’s very likely that there’s a better answer. That ties back to not only encouraging people in the moment but encouraging them to pursue their dreams and their goals – us, employees and clients.”

Again, it’s a culture of care. We care about people. That’s really the primary reason we started the firm to begin with. We saw that very few accounting firms would take it to the level that we’ve taken it.” Outside work John likes to relax by travelling throughout the US and overseas. His favourite country to visit is the UK and John and his wife like to travel across the country whenever they have the chance. “We’ve been many times; my wife really loves it. We particularly love the Cotswolds (in southern England) and travelling around Kent and the Southeast below London. We love staying at a location for many days to interact with the local community and find out about their world. It is hard to beat strolling along the white cliffs of Dover on a clear day.”

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John is a Founding Partner of CCK Strategies. John is a member and Past Chair of the Oklahoma Governor’s International Team (OKGIT), an effort expanding Oklahoma’s influence beyond US borders. John is a Certified Public Accountant accredited in Business Valuation and is a



Chartered Global Management Accountant. He is a Certified Valuation Analyst and a Certified Merger & Acquisition Advisor. John is a past-member and past Chair of the OSCPA Editorial Board of CPA Focus Professional Magazine and is a contributing author from the University of Kansas.