

A Capstone Conversation with Sarah Dobek



Founder & President
Inovautus Consulting



CAPSTONE MARKETING

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Hello everyone. This is [Jean Caragher](#), President of [Capstone Marketing](#). I am excited to be talking today with [Sarah Dobek](#), who was recently inducted into the [Association for Accounting Marketing Hall of Fame](#), thus becoming a Bruce W. Marcus Lifetime Fellowship Member of the organization.

Sarah is the founder and president of [Inovautus Consulting](#). She joined AAM in 2003 and served on the AAM Board of Directors from 2012 to 2014. Currently, Sarah is a member of AAM's Environmental Scanning Council. Sarah has been named as one of the top 100 people in accounting by Accounting Today many times. Sarah, congratulations on being inducted into the AAM Hall of Fame.

Sarah: Thank you, Jean, and thanks for having me.

Jean: You're welcome. Now, in preparation for this conversation, I reviewed your LinkedIn profile and discovered that your entire career so far has revolved around accounting or professional services marketing. I did not realize that until today.

Sarah: Yeah, absolutely. I started as an intern in an accounting firm in 2002, I believe, and that's what landed me my first job within a public accounting firm as their first marketing person.

Jean: Did you think that now more than 20 years later, that you would still be in this profession?

Sarah: No, I did not. I had no clue what was in store for me the day that I walked up to that accounting firm in my job fair and struck up a conversation with a managing partner. It is never in my wildest dreams what I have imagined that I'd still be sitting here today working with public accounting firms.

Jean: Well, we're glad that you are. And I know that we're going to gain some of your knowledge and ideas here today during our conversation. Let's start off by asking your thoughts about the greatest challenge in marketing accounting firms.

Sarah: Oh, my goodness. I thought about this quite a bit when you posed the question to me because I think there's a lot of challenges going on to be a marketer today, especially in accounting firms. I think that it's still understanding the buyer groups is probably the hardest thing that we have to do because in professional services and in accounting, they buy differently, right? They don't buy the same way that you buy a product online. And so not only is the transition of how marketing is happening today in and of itself its own challenge but when you layer on the fact that most accounting firms are trying to go after a lot of buyer groups,

right? They have all of these niches. You've got marketers that are trying to understand each of those individual buyer groups, the buyer patterns with sometimes professionals and sales positions that sometimes recognize, sometimes don't recognize buying triggers, right? It's really challenging to be a marketer in an accounting firm. It's half facilitation and probing and influence and half actual marketing.

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Whereas when you go to look at product marketing, it's often very different. It's a little bit more cut and dry, a little bit easier sometimes to get your hands wrapped around some of that. And there's just so many other nuances. And the ability to not only identify that but get in front of these people is hard. Digital has actually made it harder, not easier for these people because there's just so much noise, right? Capturing attention, getting them to respond to an email. I can't tell you how many times I'm on the phone coaching somebody from a sales perspective. And they're like, "It's just really tough to get a response from people these days." There's so many things going on. And as marketers, we have all of this that we're dealing within an accounting, like, it's amplified because not that many people want to raise their hand and be like, "Yeah, let's talk about my finances." That sounds really groovy to me right now.

Jean: One of my pet peeves is the amount of email that I get from total strangers. These are totally cold emails. And as a matter of fact, I need to write a LinkedIn post about it or something. And the number of times that they don't even give you the opportunity to unsubscribe or opt-out. And I'm collecting the weird ways folks are saying, "If you want to opt-out, reply with whatever the terminology is." But some of them are so kooky that I laugh. It's not only communication and emails from people that a prospect might know. It's all of this other stuff from the cold just being shoveled out there.

Sarah: It is. And it makes it really hard for people that are doing above-board tactics in marketing. And it gives marketing professionals a bad name. I remember a couple of years ago, I mentored a group from Colorado University in their MBA program. And I was on just a meet-and-greet with students and they were interviewing employers and asking questions. And one of them came at me and really angry about just assuming that we did all the below-the-board tactics on spamming people or whatever. And I was just like, "I think you might have me confused with somebody because that's not what we do, right? And I'm so sorry you've gotten the impression that that is a professional career because it's not." But, yes, there are a lot of people that just cold email. And along with you, Jean, it just drives me crazy to get all of those cold emails.

Jean: Right. So, getting back to the challenges in marketing CPA firms, you mentioned niching. And I think we're both huge niche marketing supporters. Can you speak a little bit to that extra challenge for the marketers who may be a marketing department of one or maybe two and a firm has several niches of having that knowledge and that background of several industries and not being able to really just focus in on a more finite number?

Sarah: Yeah, I mean, I think it is challenging. I think, I started as a department of one, so I still get it. And I understand that challenge immensely. I run a small business, not a department of one, but you know, we're not a big, massive company either. We still kind of carry that hat of needing to be able to do multiple things. And I don't know that I have like a secret ingredient or solution for the problem other than to say that I just used to immerse myself and still do in whatever it is that I'm learning. And I would also really try to prioritize, right? You can't do everything at the same time. And this is something that each year I get older, I learned this lesson every year and I'm reminded through something that I do. But really trying to, pick and choose what the priorities are. And I think in marketing, especially in public accounting, you know, we're often leaned upon to support in other areas that we might not think about, that make an impact and are really important to the firm's growth and progress in cultural development. But sometimes that means that we don't say no to things.

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And so like when we're working on niching strategies or when we're doing some of these other things, I think giving ourselves the time to go and figure it out and even challenging our firms to take the time to do it. We run into this when we start working with a firm and they look at us like we've got three heads if we're like, 'We need to do some buyer persona work, we need to understand who your buyers are.' And they sometimes come kicking and screaming a little bit and then they like the outcome. You know, but it's not always an easy process because we're asking them questions that nobody's asked them to think about before, right? And if we're going to go out and build a niche, and we need to understand it, my advice to marketers is always take the time to understand your market. Go read the publications, read the industry report, sit down, and ask the questions of your partners. Don't just focus on what needs to go in this communication, but try to understand it. Because the more you understand about what you're marketing, the more it'll be able to click for you. And that's a much bigger picture than like, what's this one to do or tactic or campaign or communication that I have to develop in this moment.

Jean: That's a great point because we would say the same thing about marketers learning how their firm works, right? And how the firm is made, right? And that could be a whole other

conversation in itself, right? I feel over the decades, that a lot of what marketers do is the same. However, the marketing tools that are at our disposal these days, it has just exploded. What do you see as the biggest opportunity for accounting marketers?

Sarah: In the martech stack space, Jean, or using technology?

Jean: Not necessarily but it could be that or it could be a service line or a niche or a role that a marketer might play, what you'd like to answer.

Sarah: Yeah, fair enough. So, I think the biggest role that I see for them or opportunity is really in their role. When I entered this profession, I was constantly told, "Don't do this, don't do this. They'll look at you as admin if you do this. Don't dare get involved in recruiting. That is not a marketing function." I cannot tell you, Jean, how many times somebody told me that in my first few years in public accounting. And I beat to my own drum that I always have. And so I took it with a grain of salt. But then I looked at my firm and I said, "You know, the managing partner is telling me like, we can't continue to grow because we have a people problem." Well, I can go solve the people problem. That's what I do. I solve problems. And then he would pop up another problem and say, "We can't do this because we're having this problem, right?" And one of the things that gave me the ability to do really early on was see that growth had a little bit to do with the marketing and the sales tactics, but in professional services and accounting, it has a lot more to do with some of the other environmental factors that are influencing it. Mindset, accountability, people, because the people are the product. And so as marketers, I think sometimes we can get stuck into what we're comfortable doing or what we think our role should be.

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But if we want to create a culture of growth inside of our firm, if we really want to help our firms grow, then we have to be able to look at the broader picture and understand that. And for fair credit, there are some firms that don't give their marketing professionals the opportunity to do that despite being asked, but there's also an opportunity for us to look at those bigger pictures. And that can look like embracing technology, right? CRM is a big component of communications today and understanding that, understanding how the firm works. You mentioned it early and I can't stress the importance of that. But I see that as the biggest opportunity for marketers is to be able to step back. They are typically very strategic people. Not all marketers are. We all have specialties, but there tends to be a lot of strategic thought.

And there's a perspective that marketers bring to the table that is typically not present around the leadership table always, right? There's different perspectives that those folks bring to the table. And so to me, that's where I see the most opportunity is for marketers to get in and look at more than just a narrow field of maybe what somebody else has defined as their role and carve off ways that they can contribute to the firm and grow it.

Jean: And by doing that, they're also gaining influence within their firms because they are being proactive in doing more than their job description if they even have one of those. And then managing partners and partners are going to be more apt to go to that marketer for their thoughts on an issue that may or may not be related to marketing. That's the score. That's the win for marketers when they're getting questions from leadership like that.

Sarah: Absolutely. And that trust is so important to everything that we do because you can't influence change marketing and building a growth culture is about change at the end of the day. And you cannot influence that if you don't have trust in those relationships.

Jean: Absolutely. Tell us the factors or the skills that you see in other marketers that make them successful.

“If I had to look at one skill that I think has propelled my career over the years, it is 100% my curiosity. I can't tell you how many times a day I'm like, "I'm really just curious about this. Tell me more about, right?" Because I can't go to my second which is problem-solving if I can't understand that, right?”

Sarah: Well, one is that ability to be curious, right? I mean, that's part of what I was just talking about this idea of being able to understand more. If I had to look at one skill that I think has propelled my career over the years, it is 100% my curiosity. I can't tell you how many times a day I'm like, "I'm really just curious about this. Tell me more about, right?" Because I can't go to my second which is problem-solving if I can't understand that, right? And so whether we're marketing, we're doing something else accounting marketing is consultative selling at the day. It's consultative service. And so if as marketers, we don't have this need and this desire to be curious about what we're learning about and understand it and to problem solve. I mean, that's the heart of every campaign is, it's not just to grow, right? The lead generation comes from how do we get through to people. We're solving a problem. How do we think differently about something?

I think those are such critical skills for any successful marketer. And then the other is, especially in accounting marketing, you've really got to meet people where you're at. You have to have a lot of patience in this profession to make it here, right? And realize that it's not a personal attack. There are so many marketers that don't make it because I think they feel like they're not respected enough, right? Inside. And I'll be fair, there are some cultures that don't respect

marketing, that don't get it, that don't want to get it. But there's a lot more that do, they're just, you got to explain it. You've got to educate. And there are marketers that come into our profession that want an automatic assumption of respect and think that you shouldn't have to educate. And I hear things like it all the time, like, "Accountants just don't get marketing." Well, they're not marketers. Why would they get it? It's our job to educate them. And so I think being able to meet people where they're at and help influence that is a big part of what creates success in firms around marketing and growth.

Jean: Absolutely. And I agree. It does take a lot of patience. But I'm not going to go do somebody's tax return. I'm not going to give an estate planning consulting meeting to the client because I don't have that knowledge or that skill or that desire, frankly, to do that. So, each of us has our role. And I think education, you're exactly right, is a huge component and another way to build that authority or trust between the marketer and the firm leadership and frankly, you know, with everyone within a firm. Tell us about your top priority initiative now. What do you work on?

Sarah: So, there's a few things that we're working on with firms that I think are really relevant across the profession right now. One is brand clarity is so important at the moment. And by that, I mean, understanding who our ideal clients are going to those buyers, right? Who are we serving? What makes sense for us? There's this internal component of who the firm is current client base is made up of, right? And we have staffing concerns, limited bandwidth. And so that's been a really hot topic the last few years. And we still have firms that are working through that process. How they're positioned, right? Brand positioning matters a great deal in this market, but especially on the recruiting front. The story that we're telling about who we are, our firms being able to tackle misperceptions.

They're out in the marketplace right now. We're doing a lot of work coming out of, I'm sure you've heard about the National Pipeline Advisory Group Report. The final report just got posted about 10 days ago. But we've been speaking about how do we help influence that in our role. How do we talk about how we tell a better story? We've done work for years around recruitment marketing and support. And this is just something that's really important.

“One of the shifts we're starting to see is it's not about each individual partner in the firm. It's really about the firm [brand] voice. And that goes down to decision-making about ideal clients and how we talk about what we do.”

And the third component of that brand clarity is what is our brand voice, right? One of the shifts we're starting to see is it's not about each individual partner in the firm. It's really about the firm voice. And that goes down to decision-making about ideal clients and how we talk about what we do. That piece is where we are spending a lot of time working with firms around that.

And I think we will continue to do that over the next couple of years because of just the space that we're in these days.

Jean: So, you mentioned the importance of branding as it relates to recruiting and people. What are you seeing in the marketplace about in-office working versus virtual versus some combination? I think some firms are really doing a great job of addressing that with their people. And there are firms that just want to go back to the way it was, like, back in the old days, before COVID. What are you seeing?

Sarah: I mean, I can't say I'm seeing the swing one way or the other. I think it's a total mix. I have clients that have people in-office and that works really well for their culture. I have clients that are barely in an office and 50% remote or more and might have a policy around certain things. I don't know that there's a right or wrong other than the companies need to have clarity on what their expectations are. But I do think it affects recruiting a significant amount, but there's value still to an office structure and to meeting people. And there are skills being lost today by more limited face-to-face interactions. I see it on a regular basis. I see it with my children. They're not in remote school or anything, but there is an impact to that. And we're seeing it show up in a lot of our business development training of basic relationship development skills are lacking. And so I can't say that I'm one way or another, but I would say that I think critical interactions still need to happen face-to-face. How you structure that as a company and create those opportunities really are up to you. This came from a person that's run a virtual organization since the day I founded my company. I still think face-to-face interactions matter. And this is face-to-face, Jean. You and I are face-to-face.

“ I think critical interactions still need to happen face-to-face. How you structure that as a company and create those opportunities really are up to you.”

Jean: Yes, for sure. I laugh thinking about this because I've had Capstone Marketing for 26 years and I've always worked from the home office. So, when the pandemic started, the switch to me was, "Gosh, you mean I have to do my hair and get some makeup on and not work in my gym clothes?" Because I have to be in front of a lot more people in this manner than I had been accustomed to. So, while everybody was talking about, "The comfort of working from home," and it was the opposite for me, I was like, "Oh my gosh, I really got to put myself together and show up." But then I consider this, our ability to meet like this using technology is one of the wins of this pandemic. Because we've shown that we can get things done meeting in this way. And of course, it kind of replaces actually being in the same room next to each other. But this is as close as we could get without actually being there live. And it means a lot. And I could see folks learning communication skills and questioning and was all that in a different way, because of our use of technology or just not being around colleagues or clients as much as they used to or could have in a different time.

Sarah: It does. I mean, this comes up in a lot of our BD work that we do. But there are so many people that don't do this, right? My company, it's weird when you're not on a video call, in my company, right? Every interaction we have is a quick video Zoom, "Hey, do you have a minute?" It's just odd to everybody when it's just a phone call. It's like my kids, when we call somebody, grandparents call and they're not on video, they're looking at the phone talking to it, even though there's no picture. And I always have to say, "You can't see them. They're not on video, right?" My children don't know how to pick up the phone and put it to their ears. They're so used to video. But there are still a lot of firms out there that are hybrid where this is not the norm. There's still a typed message, instant message, or emailing back and forth. And I think for it to work and to build those relationship development skills, those shadowing opportunities, it has to be more of this, right? And those like quick water cooler conversations or those quick questions that you have. And that's what replicates the popping your head into somebody's office type of thing.

Jean: Absolutely. Yeah. I worked with a client once and I was... Now, how did we make this happen? I must have been on the phone with her and had a series of questions and she needed to check with someone to get information to answer those questions. And instead of walking down the hall, a few offices down, and meeting with this person, she just kept sending emails with questions and getting emails back. And they literally were probably 30 yards away from each other. And it's that kind of stuff that it can't be, get out of your chair, walk down the hallway, have some interaction, chat, and get your information.

"If we think about what helps them be more successful, it is the ability to have the conversations. And I can't tell you how many exchanges happen over email where I'll finally raise a hand and be like, 'Can we get on the phone about this?'"

Sarah: You know, what? Though that represents. I think it represents a big challenge, right? Even for marketers, right? If we think about what helps them be more successful, it is the ability to have the conversations. And I can't tell you how many exchanges happen over email where I'll finally raise a hand and be like, "Can we get on the phone about this?" Because I spend more time emailing and have actually set that as like a boundary in some cases to say, like, "We can't continue to do this. It's taking longer to get answers. It's taking longer to get things done because what I could accomplish in 16 emails, I could have a 4-minute conversation with somebody and get there a lot faster." But even my clients, like nobody calls each other. If I call a client, it's like, "You called me, there's a voicemail." Like, getting somebody on the phone, like, and sometimes there's resistance. I'll be like, "Can I speak to you?"

And it's like, "Well, we got to set up a meeting," which means we got to exchange four or five different emails to schedule a meeting. And I think that's a challenge. We need the pendulum to swing the other way. If we're thinking about development or make it a little easier. And fortunately, things like HubSpot meeting links or Calendly or bookings are making that easier.

But, yeah, there's a component that, that is making it harder, I think, for marketers too, because I did run into that earlier in my career. And I felt like it was easier to exchange information. And there's a lot that somebody can communicate outside of words in our body language, about context and storytelling that just doesn't happen in email.

Jean: And when my career started, Sarah, I didn't have that challenge because it didn't exist.

Sarah: Fair enough. So, you remember.

Jean: I do. I remember all that stuff. Everything was face-to-face or the telephone because, oh my gosh, and I could go on, but I won't. So, what is your best piece of advice for accounting marketers?

Sarah: Yeah. Well, I shared one of them, which is don't let people define your role and don't let them tell you what you should and shouldn't be doing. You've got to follow your instincts. I'm grateful that I did early in my career, even though people told me not to get involved in recruiting. I always looked at it differently. I thought, "Well, that doesn't make sense to me because I'm doing all of the sales stuff over here and marketing stuff. And isn't that just sales for potential employees?" I would just be baffled by the mindset around that. So, I just ignored them and I followed my intuition. And so I think our intuition is important. But the other thing that I would tell marketers today is don't be afraid to learn something new. There are so much change happening right now with AI and even with lead generation, right?

Accounting is always behind the curve in the rest of the industries, but lead generation inbound marketing is becoming critically important for firms. And I've seen a number of marketers just really hesitate to understand technology like HubSpot and really get into it, hesitate to understand the translation, right? They might be comfortable with the branding piece, but they're not always comfortable with the execution and how it all comes together. And to be honest, that's where the magic happens. And so don't be afraid to learn something new, even if you're in the middle of your career or at the tail end of your career, right? Because that's what's going to help you be relevant and you will get passed very quickly if you don't figure it out.

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Jean: Right. I couldn't agree more. And your use of the word relevant is spot on, right? Because things are changing so fast that you really do need to adapt no matter what point you are. So, on the flip side, what's your best piece of advice for managing partners?

Sarah: Yeah. So, I would say the best managing partners I've worked with always empower their marketers and their practice leaders, right? Part of that means bringing them into the fold to

ensure that they're aligned with your vision, right? And so don't hold it close to the vest. I still can't tell you how many marketers are like, "I have no idea what our revenue was last year." Again, baffles me. I have no idea what our billing rates are. It escapes me, right? But the other is set really clear direction. You don't need to micromanage them, but be clear on what the expectations are and make sure they're realistic, right? Part of empowering our markers also means supporting them in front of the partner group, right? If you have a marketer that's coming to you and let's just take CRM and saying, we need clear, consistent communication, right? In the past, maybe we have partners that hem and haw because they don't want to change, right?

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But a strong managing partner, if they align with the direction that firm is going and they understand the value and the importance of that communication, will support whatever those processes are. And I'm using CRM as an example around that because it's such a critical one, right? And too often, we let partners drive everything and we end up with all of these splintered experiences. And then we turn around and we go, "This isn't working. It's failing." Well, why is it failing, right? And so a lot of times those types of things happen in marketing and we're not really supporting what we're doing. So, I think that's super important. The other is invest in the technology to the managing partners, right? There is such a large tech stack that's needed to be successful and be more effective. And I promise you, when you've got the right person running it, it will make improvements across your entire organization. Some of this technology isn't just for marketing. There's other impacts that it can have to the company.

Jean: For sure. And if there's anything accountants love, it's data, right?

Sarah: Right. Yeah.

Jean: So, when you have that technology in action and you can share all these statistics and trends with them, that does help the buy-in so they know it's just not a frilly marketing thing. But it actually helps them make business decisions. That's again, another way for marketers for it to be a win-win situation between them and their leadership.

Sarah: Yeah, absolutely. When you can start to show their reporting, we see that, I know I'm talking about CRM a lot because there's such an integration to the leadership team, understanding the value of marketing, where we can provide that level of reporting. But I see the light bulbs go off every day when they see the first set of reports in full transparency around where they're at in their growth projections. It's just really powerful, right? They get it. And the partners who might've been a little resistant to that change also start to get it too. And so being

able to speak their language, but being able to show them some of those things creates so much trust. And it just empowers the whole growth culture to be able to build momentum.

Jean: Absolutely. Now, I mentioned in the intro about your being inducted into the Hall of Fame and I didn't spend any time on that early on. So, I want to congratulate you again and ask you, now I think you knew ahead of time, correct?

Sarah: I did, yes.

Jean: So, what were you thinking as it is, that you were getting a fantastic intro from [Carrie](#)? What were your thoughts then?

Sarah: Well, part of the reason I found out in advance is because I had some travel conflicts and originally was not planning to be there. I was supposed to be on the other side of the country, which I still had to be on the other side of the country, but I flew to Florida to accept the award because it was important to me, and AAM's always been important to me and a big part of my career. But I just felt really honored. Even when I was told in advance, I was sort of shocked and I felt special. It's a peer-driven award, right? And so that is, well, I've been blessed to be honored for the work that I do in lots of different facets and ways. The most meaningful are always the peer-driven awards.

Jean: Well, it's well deserved. And I just marvel at how things have changed in the most positive way with AAM because when I look back on all the different sorts of awards and the campaigns that the marketers are implementing and the sophistication that has come to the discipline of marketing for accounting firms, I'm very proud of that too, even though I'm not... I'm just so happy for others too because of the advancement that's taking place. It's really something.

Sarah: It is. It's amazing to see how far the profession has come. I'm right there with you and I think back to my early days in marketing and to talking about analytics. Like, part of my summer intern project was to develop a growth plan and I ran all of the analytics by hand from a PDF practice management report. I had my summer coding information into an Excel document to be able to analyze. And...

Jean: Oh my gosh.

Sarah: ...now to think about how far we are today with being able to look at it...

Jean: Oh, boy.

Sarah: ...and realize how advanced that was at the time too, right?

Jean: Oh my gosh. So, I know I'm making myself seem like I'm like 85 years old but when I was at my first firm, my managing partner had come back and this would have been, like, one of the earliest practice management conferences that was ever held through the AICPA. And he came

back and he said, "Hey, I learned that we need to have our clients organized by SIC code. I want you to get right on that," and all the stuff. And it was handwritten. I mean, how in the world, but that's how it was. We didn't know any difference at all and now, oh my gosh, there's probably an app that you could just send a list to and it assigns the codes itself. I mean, who in the world knows? But it's, who knew accounting marketing could be so fascinating, Sarah?

Sarah: I know, right?

Jean: Oh my gosh. Well, I've been talking today with Sarah Dobek, the founder and president of Inovautus Consulting and a recent inductee into the AAM Hall of Fame. Sarah, congratulations again. It was just such a pleasure talking with you today.

Sarah: Thank you so much, Jean, and thank you again for having me.

Jean: You're welcome.

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Jean Caragher
Capstone Marketing

jcaragher@capstonemarketing.com

www.capstonemarketing.com

<http://capstonemarketing.com/category/blog/>

Connect with **Jean:**

[linkedin.com/in/jeancaragher](https://www.linkedin.com/in/jeancaragher)

[@JeanCaragher](#)

[facebook.com/capstonemarketing/](https://www.facebook.com/capstonemarketing/)

35246 US HGY 19 N

#225

Palm Harbor, FL 34684

727.210.7306