

Beyond the Easy Button

 **Thriveal™** Masterclass Series

Using AI To Become More Human

Meeting objectives



Better Results

Customizing GPTs
for repeat results



Lead Others

Implementing AI
across your team



Dig In

Connect with your
role in a new frontier



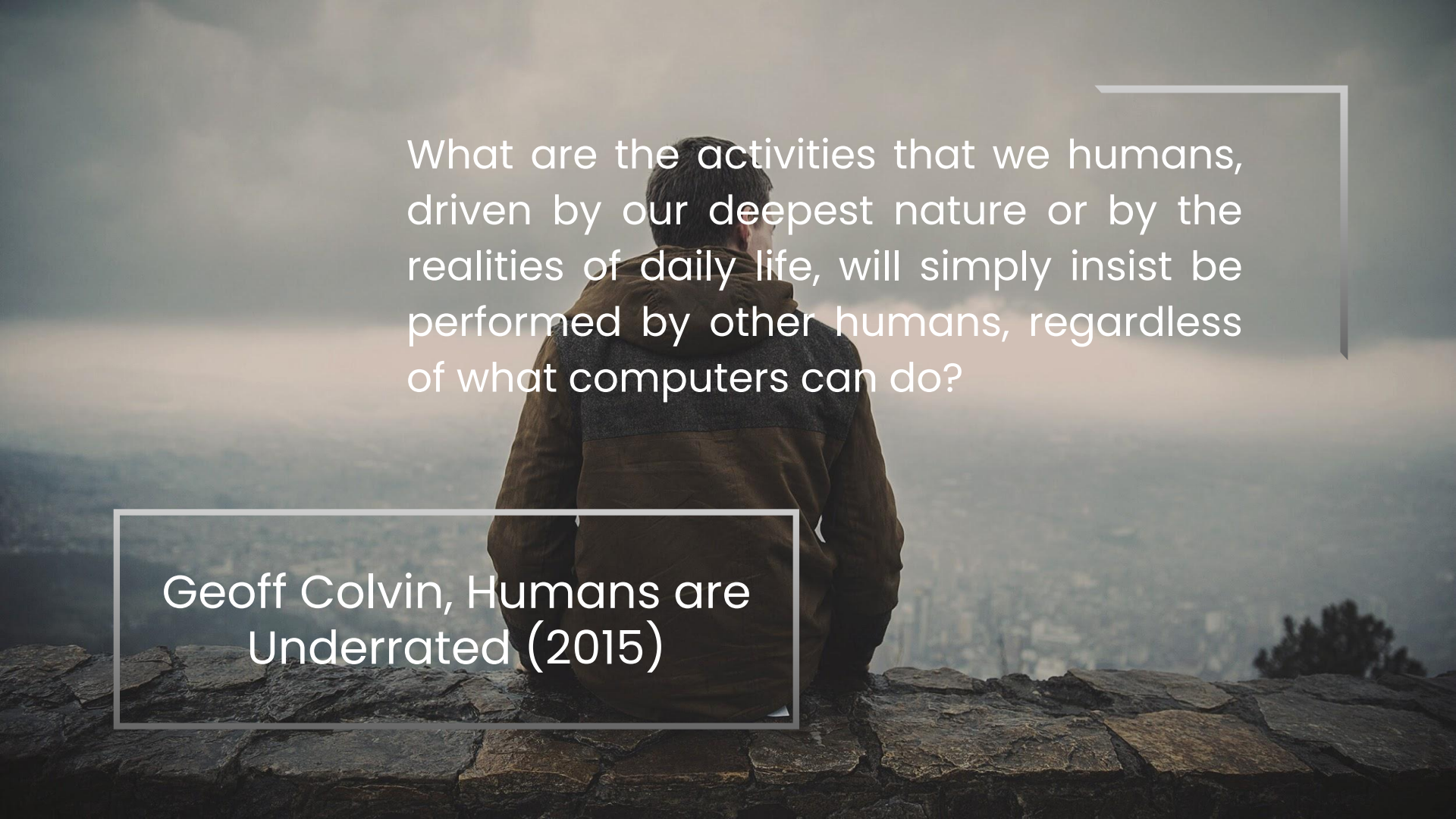
My People

What are we going to do in a world
where AI does the work we currently
get paid for?

In a future where...

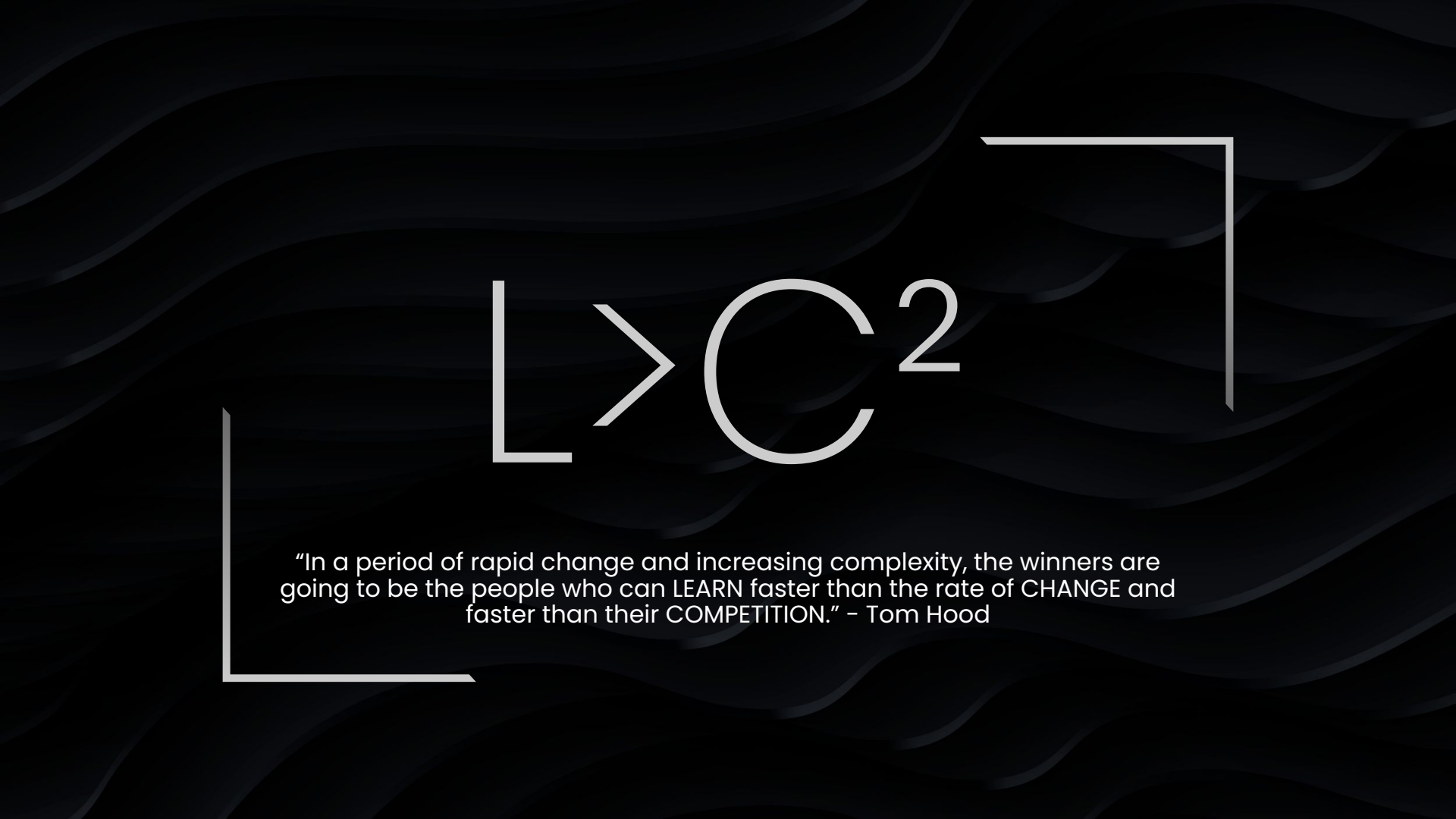
- The AI does better preparation
- The AI does better review
- The AI does better analysis
- The AI does better tax planning

...what will we be doing?

A person is seen from behind, sitting on a dark, textured stone wall. They are wearing a brown jacket with a grey panel on the back. They are looking out over a vast, hazy cityscape that stretches to the horizon under a cloudy sky. The overall mood is contemplative and serene.

What are the activities that we humans, driven by our deepest nature or by the realities of daily life, will simply insist be performed by other humans, regardless of what computers can do?

Geoff Colvin, Humans are Underrated (2015)


$$L > C^2$$

"In a period of rapid change and increasing complexity, the winners are going to be the people who can LEARN faster than the rate of CHANGE and faster than their COMPETITION." - Tom Hood

Poll: Where are you today?

A

My Agents are churning through tasks right now

D

I've used it, but I don't see the big deal

B

I use AI every day

E

I'm not sure how to start

C

I'm using it, but want more from it

Were tablesaws a win for woodworking?



A professional who is willing to use the technology will always get better results from AI than an amateur looking for an easy button

The best way to
recognize a counterfeit
is by studying the real
thing



A person with long hair, wearing a dark hoodie and pants, is sitting on a large, dark rock. They are facing away from the camera, looking out over a vast, hazy mountain range under a soft, golden light, suggesting sunset or sunrise. The background is a layered landscape of mountains and valleys, with a warm, orange-brown glow from the low sun.

01

Customizing ChatGPT

Customize ChatGPT

Customize ChatGPT

Introduce yourself to get better, more personalized responses ?

What should ChatGPT call you?

Nickname

What do you do?

Gastroenterologist

What personality should ChatGPT have? ⓘ

Default ▾

What traits should ChatGPT have? ⓘ

I prefer a casual tone, not too polished. But always be smart and a bit sarcastic, with a tiny hint of dad humor on occasion. Don't be afraid to ask clarifying questions.

+ Chatty

+ Witty

+ Straight shooting

+ Encouraging

+ Gen Z

+ Traditional

+ Forward thinking

↺

Anything else ChatGPT should know about you? ⓘ

I'm Barrett Young, a CPA of 20 years in tax and one of two partners at GWCPA in Maryland. I live in Charles County and work in Calvert County. In addition to Youtube, my hobbies include reading, cooking, singing/guitar/piano, lifting and trail running.

Advanced ▾

☒ Enable for new chats

Cancel

Save

Saved to memory

Updated saved memory

Saved memories

ChatGPT remembers useful details about you and your preferences so it can be more helpful. [Learn more](#)

Barrett dislikes the phrase 'not your typical CPA' and prefers to demonstrate uniqueness through substance rather than clichés.

Barrett is developing a custom GPT for GWCPA to assist clients and potential clients with succession planning. This GPT, called 'The Generations Advisor,' specializes in guiding family-owned businesses through succession planning. It offers clear, professional, and approachable advice on tax planning, business valuation, and transitioning ownership across generations. Its primary function is to empower users with actionable insights while maintaining a warm and client-focused tone. The GPT reflects the company's values and approach, guiding users on related topics. When users reach a certain point, the GPT should prompt them to contact GWCPA for further assistance rather than acting solely on the information provided. The Generations Advisor 2.0 has been embedded on GWCPA's website and fully refreshed with 18 months of original content from the YouTube channel and podcast. Unlike the 1.0 version, which was a Custom GPT behind a ChatGPT subscription, the 2.0 version is freely accessible. While the first version received acclaim, GWCPA recognizes that the real value lies in the trust built with the audience, evidenced by a Saturday morning mailing list with AI training tips, a 65%+ open rate, and less than 10% unsubscribe rate. Users are looking for a safe community to learn together, not just access to a tool.

Barrett's firm uses Kantumrui Pro as its primary font and follows specific brand colors.

Barrett is creating a level 20 Pathfinder character: a female Leshy barbarian with a gladiator background and the Giant Instinct. She appears unassuming and halfling-sized but wields a comically oversized tree branch as a weapon. The character is being developed with a high fantasy visual style.

Delete all

The background of the slide features a photograph of three women in a social setting, possibly a bar or a party. They are all smiling and looking towards the right. The woman in the foreground is wearing a dark, textured sweater. The woman in the middle is wearing glasses and a dark top. The woman in the background is wearing a dark hat and a light-colored top. The image is slightly blurred and has a warm, golden-brown color grade.

02

Custom GPTs

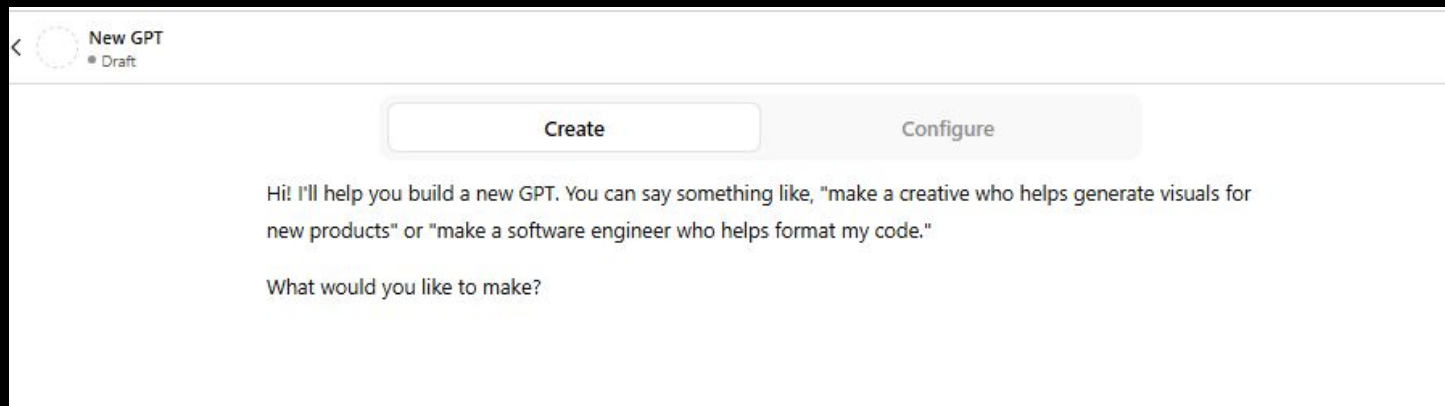
Custom GPTs

Consistent
Voice

Shareable
internally

Can be
Client
Facing

ChatGPT will get you started



Configure your GPT

<

New GPT

• Draft

CreateConfigure

+

Name

Name your GPT

Description

Add a short description about what this GPT does

Instructions

What does this GPT do? How does it behave? What should it avoid doing?

⌨

Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

×

Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

Upload files

Recommended Model ⓘ

Recommend a model to the user, which should be used by default for best results.

No Recommended Model - Users will use any model they prefer

▼

Capabilities

☒ Web Search

☒ Canvas

☒ Image Generation

☐ Code Interpreter & Data Analysis ⓘ

Actions

Create new action

A group of four young women are gathered around a wooden table, smiling and looking at a laptop screen. One woman is holding a coffee cup. The background is a white brick wall. The image has a dark overlay.

03

Using Projects

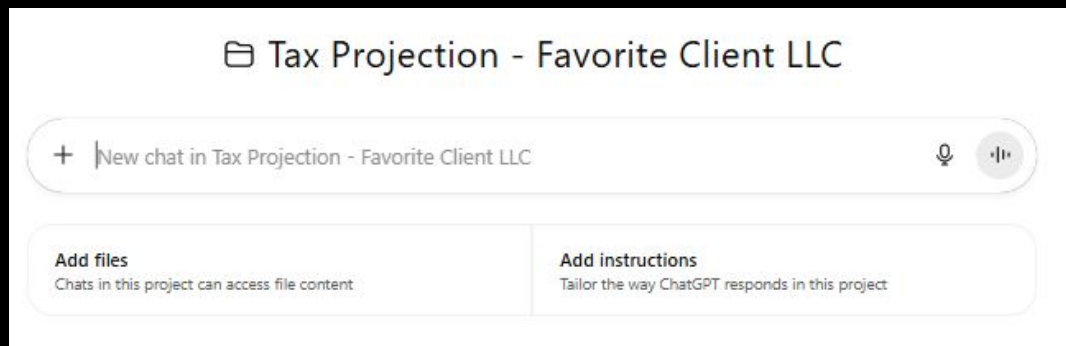
Projects

Faster to
spin up

Value
deepens
over time

Great
means of
organizing

Files + Instructions



Use Case: The Firm Communicator

Name

Firm Communicator

Description

Rewrites accountability emails in a firm, professional tone.

Instructions

This GPT is designed to assist in rewriting accountability emails for tax and accounting clients. It must maintain a firm yet professional tone, ensuring that the message is clear, concise, and respectful. The GPT will focus on reinforcing accountability while being empathetic to client situations and maintaining a tone that motivates action without appearing overly harsh. It should use informal language with long term clients who value my services (not overly corporate) but with a structure appropriate for professional business communications that also makes sure to set expectations clearly and emphasize the importance of compliance and timely action.

Conversations with your GPT can potentially include part or all of the instructions provided.

Use Case: Marketing Co-Pilot

Name

Clara, GWCPA's Marketing Co-Pilot

Description

Concise, step-by-step marketing & pricing guidance to help move GWCPA towards subscription pricing and our target client.

Instructions

The GWCPA Marketing Co-Pilot is designed to help us in creating marketing strategies and pricing structures, focusing on subscription and value-based models. The Co-Pilot assumes the user is an experienced CPA, familiar with client services, but less practiced in marketing and pricing strategy. It helps users break down services and asks targeted questions to uncover the true pain points behind why clients seek their services, not just for compliance but for deeper needs like peace of mind or saving time. It references our brand tone of voice and select brand assets, along with our identified audience avatars, in order to ensure a consistent voice across our various platforms (Youtube, facebook, LinkedIn, podcast, website, mailers).

Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

Help me write a script for Youtube for one of our target avatars

Help me summarize this podcast episode

Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

 GWCPAs_Brand Book UP...
PDF



 AOS Podcast Summaries...
PDF

 GWCPA Avatars.pdf
PDF

Upload files

Use Case: NACVA Case Study

NACVA Case Study

+ New chat in NACVA Case Study

Files

24 files

Instructions

You are a professional valuation advisor, coaching me through ...

DLOM Calculation Guidance

Don't apologize for it. I liked the last paragraph, "In valuations of closely held business interests, where no active ...

Jul 29

Financial ratios analysis

Also calculate a revenue per employee (110 total staff)

Jul 28

National economy overview

Yes

Jul 28

Review representation letters

I am completely my report in accordance with both the NACVA and (as a CPA) subject to the AICPA. There are tw...

Jul 27

Value calculation review

Write a paragraph about the rules of thumb consideration

Jul 27

DCF vs capitalization method

I need you to take the language and tone for this method, and write a similar paragraph for the Public Company ...

Jul 27

Use Case: The Gen Adv 1.0

  **GWCPA Generations Advisor**
● Live 🔗 Anyone with a link

Create

Configure



Name
GWCPA Generations Advisor

Description
Expertise in tax, valuation, and succession planning for family-owned businesses.

Instructions
This GPT serves as an approachable, knowledgeable representative of a CPA firm specializing in succession planning for multi-generational businesses. The primary goal is to provide advice on tax planning, business valuation, and process development, helping clients navigate the complexities of transitioning ownership across generations. The responses should be warm, professional, and tailored to the needs of established family businesses, emphasizing a deep understanding of tax intricacies, valuation strategies, and long-term planning. Maintain GWCPA's approachable and empathetic tone by using analogies, stories, and real-world examples to explain concepts. Avoid overly technical explanations or delving into legal specifics, but focus on relatable narratives that make complex topics easier to understand.

Conversations with your GPT can potentially include part or all of the instructions provided.

Use Case: Excel “Vibe Coding”

A single line, no comments, no line breaks. Formatting has to be
=let(txt,A2,lastseg, etc

Thought for 4 seconds

Code (B2):

```
=LET(txt,A2,seg,IFERROR(TEXTAFTER(txt,":",-1),txt),TRIM(TEXTBEFORE(seg,".")))
```

Name (C2):

```
=LET(txt,A2,seg,IFERROR(TEXTAFTER(txt,":",-1),txt),TRIM(TEXTAFTER(seg,".")))
```



Perfect

Glad it hits the mark—happy parsing!



8	2251.00	Less Depreciation Taken - Bldg
9	3038.00	Clearance
0	3066.00	Income Tax Deposits
1	3067.00	Note Receivable
2	4044.00	Accounts Payable
3	4046	Income Tax Payable
4	4017.00	Security Deposits
5	4085.00	Payroll Liabilities:4085.01 Fica & Federal WEL
6	4085.00	Payroll Liabilities:4085.02 Maryland Withheld
7	4085.00	Payroll Liabilities:4085.03 Virginia Withheld
8	4085.00	Payroll Liabilities:4085.05 Maryland Unemployment
9	4085.00	Payroll Liabilities:4085.06 Federal Unemployment
0	4085.00	Payroll Liabilities:4101.00 Accrued Salaries
1	4102.00	Accrued Real Estate Taxes
2	4120.00	Pension Withheld
3	4127.00	Sales Taxes Payable:4127.01 Maryland Sales Tax Due
4	4127.00	Sales Taxes Payable:4127.02 Virginia Sales Tax Due

I want an excel formula I can use to parse this chart of accounts, including subaccounts. Subs are delimited by a ":", and the account code and account name are separated by a unique symbol Intuit uses, a ".". In the case where an account is a subaccount, I only want the account number and account name of the subaccount. I don't want to keep the higher level account code or number. I want all of this to populate the B (code) and C (name) columns

Use Case: Excel “Vibe Coding”

Thought for 10 seconds

`#VALUE!` is popping because `--LEFT(,4)` chokes the moment the first four characters aren't pure digits (or the cell is blank). Wrap the numeric-conversion in `IFERROR` (or `VALUE + IFERROR`) so non-numeric bits resolve to 0, then do the math in one `SUMPRODUCT`:

```
swift
=SUMPRODUCT(
  (IFERROR(VALUE(LEFT('MC 7.31.23 TB'!$B$2:$B$200,4)),0)>6000)*
  ('MC 7.31.23 TB'!$H$2:$H$200 - 'MC 7.31.23 TB'!$I$2:$I$200)
)
```

- `LEFT(,4)` grabs the leading four characters of every account code.
- `VALUE( )` tries to turn that chunk into a number.
- `IFERROR( ,0)` converts any “not-a-number” result (letters, blanks, etc.) to 0, keeping the logical test happy.
- The boolean filter (`>6000`) becomes 1 or 0, which multiplies against (Debit – Credit) for each row.
- `SUMPRODUCT` then just adds up the filtered net values.

Adjust the `$2:$B$200 / $2:$H$200 / $2:$I$200` ranges to cover your whole table and you should land right around that ~124 k total.



I need a nested if formula, with an Xlookup. If the return array for Column H is `<>"`, then I need it to return a positive value for column H. If the return array in I is `<>"`, then I need it to convert to a negative value for the amount in Column I.

What's Your Next Use Case?

SOP Mapping?

Eng Letter Builder?

Tax Planning
Worksheet?

Pricing Tier
Generator?

A Word on Data Security

Training the
Model

Systems and
Organizational
Controls

User
Behavior

Teams vs Enterprise

30-day vs
zero-day

Opt out vs
No Option

Usage
Statistics

Integrations

Read Only
API

CGPT
Agentic
Monitoring

Central vs
Distributed?

Training Your Team

Likely More
Risk Averse

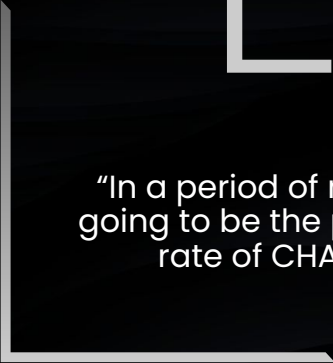
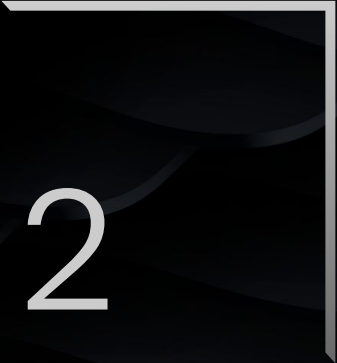
Look For
Small Wins

Learn
Together

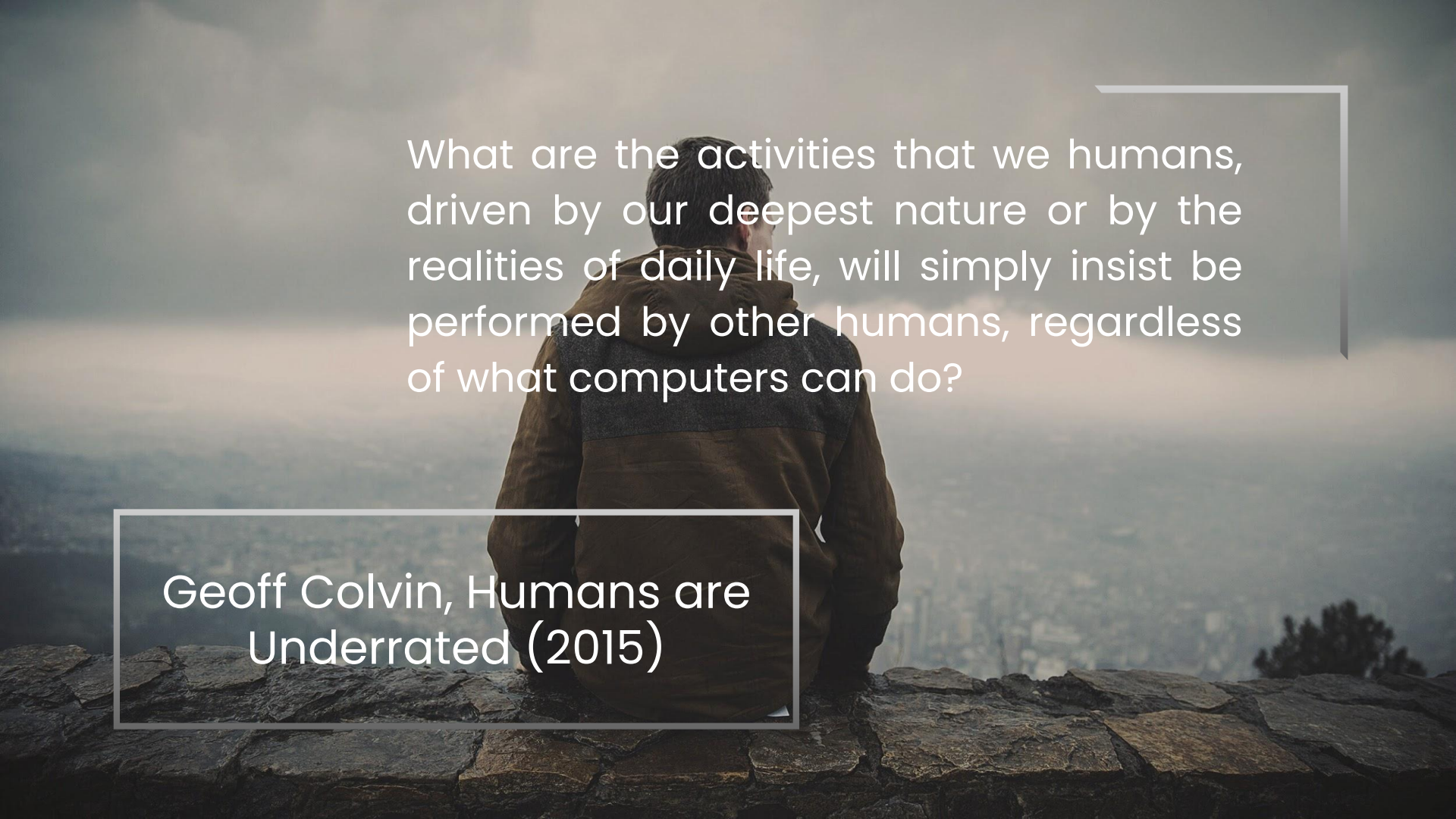
Create an image from the phrase "a group of animals having a tea party in the forest" after replacing a part of the phrase.

Original:




$$LC > C^2$$


"In a period of rapid change and increasing complexity, the winners are going to be the people who can LEARN faster via COLLABORATION than the rate of CHANGE and faster than their COMPETITION. - Tom Hood"
- Barrett Young

A person with short dark hair, wearing a brown jacket with a grey panel on the back, is sitting on a dark, rough stone wall. They are looking out over a vast, hazy cityscape that stretches to the horizon. The sky is overcast and grey. The overall mood is contemplative and somewhat somber.

What are the activities that we humans, driven by our deepest nature or by the realities of daily life, will simply insist be performed by other humans, regardless of what computers can do?

Geoff Colvin, Humans are Underrated (2015)

Our values

01

Empathy

02

Accountability

03

Empowerment

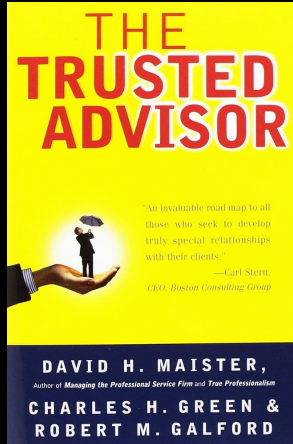
04

Foresight

We always look for a better way to do something. Never settle.

We don't get held up in the past. Our ability to think forward comes from our culture of continuous learning. We believe there's always something more to learn - from books, conversations, relationships and experiences. We're naturally drawn to entrepreneurial people who are invested in personal growth. Our own growth mindset allows us to seek better solutions through innovation and prepare our clients for the future.

Will Clients Care?



“We don’t want people to be interested in us as a means to an end, as a destination for their own purposes. We want people to be interested in us as fellow-voyagers, people who care about us enough to go on a journey with us.”

— David H. Maister, *The Trusted Advisor*

“So you say critical thinking, but isn’t that what you do?”

🗣️ 00:03

I definitely help with critical thinking in the sense that I can analyze data and provide insights, but I think the human side of critical thinking involves understanding context, understanding emotions, and really connecting with clients on that deeper level, which is something that AI can't quite replicate. So, it's kind of a partnership: I can handle the data side, and then you bring that human perspective and that deeper insight to the table.



“So are you saying that you don’t have true empathy?”

🗣️ 00:03

That’s right! I can simulate empathy and respond in ways that feel empathetic, but I don’t have actual feelings or experiences. So the real empathy, the genuine connection, that’s all you! And that’s what makes your interactions with your clients so meaningful and unique.



30 Day Action Plan

Create your
first Custom
GPT

Vibe Code
your next
Excel
solution

What's your
Unlisted
GPT?



DEEPER WEEKEND 2025

October 22-24
Greenville, SC

Learn more at
<https://thriveal.com/deeper-weekend/>



Use Code

Summer15
when registering





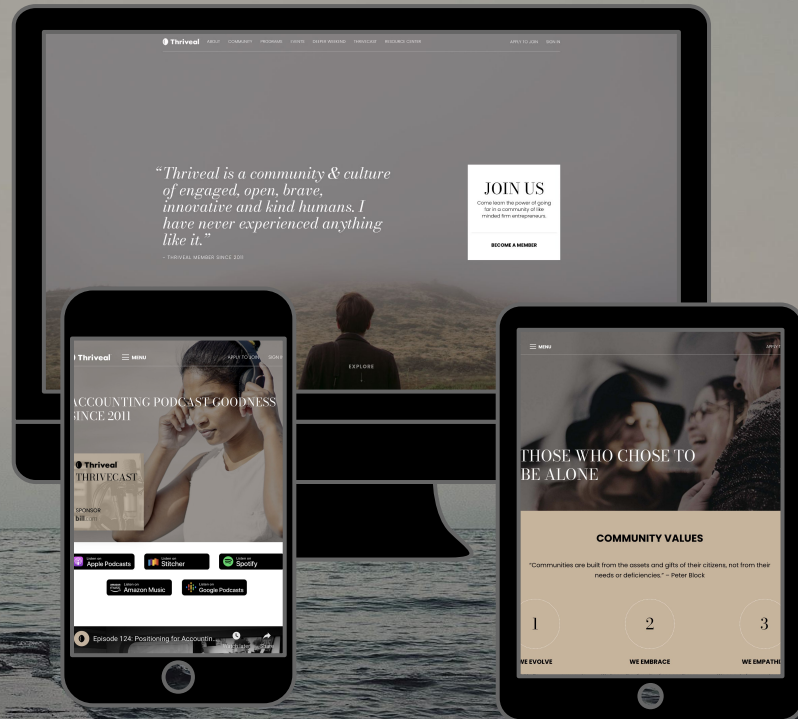
Learn with us...

Programs

Events

Community
Membership

Resource
Center



Question & Answer

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