

Staff Profiles

Partner – Iain Gordon MA (Hons) CA

From my time at school, I had always been interested in a career in business and this interest led to me completing a degree in accountancy at the University of Aberdeen in 1993. I also believed it important to pick up some practical experience of what day to day life in an office environment would be like and during my final summer at University, I successfully obtained a work placement with the firm.

This experience confirmed to me that accountancy was the career I wished to pursue and my time with the firm during the course of that summer convinced me that the variety of training offered by a medium sized firm would provide the most rounded career development path.

I successfully qualified as a CA in 1996 and, sensing that the firm's ambitions matched my own, I was happy to stay with them in order to progress my career. Responsibilities came quickly and, at a relatively young age, I was involved in the day to day management of one of the firm's accounts departments. I was also able to further develop my business skills and, in particular, my interest in taxation.

This culminated in my appointment as a Partner of the firm in April 2006, where I have continued to develop and nurture a significant client portfolio, ranging across a number of industries and over a wide geographical base. My testimonial confirms that there is no barrier to what you can achieve with EQ.

Partner – Mark W Wilken BSc (Hons) MBA CA

Coming from a farming background in the north east of Scotland, I originally studied for a degree in Agriculture at Aberdeen University. During my time at Aberdeen I became progressively more interested in the business aspect of agriculture and on graduating in 1988 I joined a national firm of agricultural management consultants, eventually being based in the firm's Edinburgh office. My work at this time involved providing business and technical advice to a wide range of clients, including farmers, land agents, banks, lawyers, loss adjusters and government bodies. The majority of the work focused on helping farms and estates to improve their financial performance, using management accounts and business appraisals to aid decision making.

While in Edinburgh, I took the opportunity to study for a MBA part-time at Edinburgh University. This helped me broaden and in 1998 I was offered a position with EQ in the Forfar office, which included the opportunity to train as a CA. I had always been aware of their prominent position in relation to agriculture, finance and tax so the move seemed a logical step in my career. It also provided me with an excellent opportunity to use my past experience and at the same time obtain the widely recognised and valued CA qualification.

I qualified as a CA in 2001 and continued to develop, progressing through the ranks of Supervisor, Manager then Partner.

In addition to the normal accountancy and tax work I tend to play a leading role in relation to agricultural business consultancy assignments due to my past management consulting experience and detailed knowledge of the agricultural sector.

Manager – Rachel Bell BAcc (Hons) CA CTA (qualified as a CA in 2011 and CTA in 2014)

While studying accountancy at the University of Dundee I decided that I wanted to study for the CA qualification once I had finished my degree. I also wanted to stay in the local area and having heard about the firm through various careers fairs and presentations, EQ seemed like a great place to complete my training. I was lucky enough to be offered a job in the Dundee office and started my training in August 2008.

Although everything was totally new and a bit scary at first, everybody in the office was really friendly and helpful so I settled in pretty quickly. Staff of all different levels sit together in the office so there is always somebody willing to help you out no matter how small or trivial a question you might have.

One of the main things that attracted me to EQ was the fact that EQ does not departmentalise so students get to work on various different types of jobs including tax, audit and accounts. Not only does this help you to develop a wide range of skills and knowledge but it also makes work in the office a lot more interesting. One day you might be preparing individual's tax returns in the office and the next day out at client's premises conducting an audit.



The wide range of different types of clients and jobs is also a great help when it comes to studying for the ICAS exams.

As I had a relevant degree for gaining exemptions from the TC level of the ICAS exams, I started my studying at the TPS level. Studying for TPS and TPE involved being out of the office for blocks of classes, usually for 2 or 3 weeks at a time. Although the blocks were sometimes quite intense they were a great chance to meet other CA students and to get advice from other people who are in the same position. There was quite a lot of studying needed in the evenings and at weekends but it was worth it when I successfully passed my final exams (and gained an ICAS prize for my TPE paper with it being the best paper produced by a Tayside student).

Having now completed my training contract, it is hard to believe how quickly the last 8 years have gone! I have always been interested in the tax aspect of clients' affairs and the firm further developed the skills and knowledge I have gained so far by involving me in various tax planning assignments. They sponsored further studies towards the Chartered Tax Adviser qualification, which I thankfully passed in January 2014.

Assistant Manager – Scott Greig BAcc (Hons) CA (qualified as a CA in 2012)

I graduated from Dundee University in 2009 with a BAcc (Hons) degree in Accountancy and Finance. I had always envisaged myself going on to train to become a qualified CA and naturally I looked to work with a firm who could provide the best training contract to allow me to achieve this goal.

I was successful with my application to join EQ and was offered a place within their Forfar office. Almost straight away I was provided with a variety of jobs that allowed me to use my university knowledge but tailored to provide a value added service to the firm's clients. I was encouraged to ask as many questions as possible and all of my colleagues were always more than happy to sit down with me and answer them. I feel that this mutual sharing of information greatly benefited my training and development over the years.

The work I was provided with in the Forfar office was predominately agricultural based and, as I was not from a farming background, I initially felt this would be a disadvantage. However, with the comprehensive internal training programme provided by the firm, I quickly started learning the ropes!

Following EQ's merger with Fife based firm Carter's in 2015, I was offered the opportunity to relocate to our new Cupar office to help strengthen the agricultural service. I felt this was a fantastic opportunity and took up the offer straight away. I have settled in well and am enjoying working with new colleagues and clients. The increased scale of EQ also provides additional opportunities for interesting and unique work which I enjoy and I know I can always rely on my colleagues for assistance if I am ever unsure.

All the staff have a very good relationship with each other and there are always open conversations amongst everyone, regardless of their level (junior through to partner). There are also plenty of social nights out organised during the year which provides a well earned break from work and studying.

Assistant Manager – Sarah Millar MA (Hons) CA (qualified as a CA in 2010)

After completing my degree in Accountancy at Aberdeen University in 2007, I returned to my local area and started work with EQ in their Forfar office. EQ appealed to me as the firm has a good reputation and prides itself on its high level of "on the job" training – having worked here for 9 years, this is something I am able to agree with both during my training contract and beyond.

Although they have a wide client base, a large proportion of clients in the Forfar office are involved in the agricultural industry in one way or another. This appealed to me as I am from a farming background.

EQ is a medium sized firm, which does not departmentalise; this means that you see a job from the start, when the client's records are handed in, to the accounts being signed and bound and the tax returns being sent to HMRC. This is extremely rewarding and gives experience of all aspects of accounting and tax work, rather than dealing with the same aspect all the time.

I successfully passed my final exams in November 2009 at the first sitting. Having completed a relevant accountancy degree it meant that I received an exemption from the first level of exams.

While studying for my exams at TPS level, I was out of the office for 2 – 3 weeks at a time on block release, 3 times in my first year with EQ. It was possible to go to Aberdeen, Glasgow or Edinburgh on block release. I chose Aberdeen and it was nice to be back in the city where I was at university. Block release also gives you an opportunity to meet other ICAS students from other firms and to share study tips and advice.

Working all day and studying in the evenings and weekends is hard going at times – especially when the sun is shining outside but it has all been worth it in the end! There are a number of people across the offices, studying for various exams, which is good as they give each other support and help each other with any difficulties encountered.

EQ has a friendly atmosphere and there are always people to ask when you encounter a problem. They never seem to mind you asking questions, no matter how stupid they may sound. It is hard to believe I have been at EQ for over 9 years now as it has all passed so quickly!

Supervisor – Catriona McDonald BAcc (Hons) CA (qualified as a CA in 2015)

I graduated from Dundee University in 2010 with a degree in Accountancy and Finance. I had always wanted to embark on my CA qualification and after graduating I was successful in securing a position with Carters (now EQ) in their Glenrothes office, as a trainee to pursue this ambition.

Having never worked in an office environment, it was quite a daunting prospect, but I soon learned I had nothing to worry about as the staff were all very friendly and helpful. Whenever you had questions (even stupid ones!), everyone was more than willing to assist in any way possible, which was a great help. I worked for a year before embarking on my CA training which allowed me time and the opportunity to consolidate the knowledge I had gained at University and transfer this into real life situations. We have a diverse range of clients, which afforded me many opportunities to work on various assignments from accounts, to audit, to tax, providing me with lots of experience for sitting my exams.

As I had a relevant degree, I gained exemptions for TC level (at that time) and started studying for my TPS and TPE exams. I attended block release classes for both TPS and TPE and it was a great way to meet and network with other CA students who were experiencing the same as me, and supported each other through the studying and exchanged tips. Before I started classes people had always said it was hard work, they didn't lie! It does involve a lot of studying in the evenings (after the 9-5 in the office) and at the weekends (when you wanted to be out socialising) but it was definitely worth it in the end.

Carters merged with EQ in April 2015, which I believe has provided even greater opportunities to learn for those embarking on a career as a CA. Equally, having qualified, I look forward to the opportunities this will offer me to build on my knowledge base and skills level, to ensure I am equipped to provide a competent and informed service to our clients and enhance my own professional development.

Senior (and former RGU placement student) – Kathryn Smeaton BA (Hons) CA (qualified as a CA in 2011)

I graduated from The Robert Gordon University, Aberdeen in July 2008 with a BA (Hons) in Accounting and Finance. During the 3rd year of my degree I was fortunate enough to secure a 48-week placement with EQ in their Forfar office. The placement was a requirement of my degree course and was designed to widen my knowledge and expertise in the field of accountancy, whilst providing me with further insight into accountancy in practice and the various other areas involved.

During my placement I participated in a wide variety of work. I assisted in the preparation of both accounts and tax returns and this gave me an excellent grounding for my final year studies. I also attended training events, including one for the computer package, Sage, which is used by many accountancy practices and their clients. This training was extremely helpful in furthering my understanding of the package.

The staff at EQ are all friendly, enthusiastic and, above all, eager to help. No question goes unanswered and nobody grudges helping even if I did feel, at times, that I was asking a really silly question. The atmosphere within the office is friendly and I was made to feel part of the team immediately. The firm also encourage appraisal forms to be completed for larger assignments and I found these particularly helpful as it gave me a sense of achievement when I received a good appraisal on an assignment, but it also detailed how to improve things the next time round.

I really enjoyed my placement at EQ and the staff events were always really enjoyable – whether it be the Christmas nights out or the staff barbecue! All in all, I found the experience at EQ very enjoyable, extremely helpful and a great incentive to do well during my final year.



Following my placement at EQ, I was then fortunate enough to be offered a CA training contract with them. I started my training contract in August 2008.

I successfully completed my training contract, following the completion of my ICAS exams. It was very hard studying at night following a hard day's work, but it has definitely been worth it in the long run.

I have very much enjoyed my time at EQ to date and look forward to the future here.

Senior (and ex-summer internship student) – Keira Malkowska MA (Hons) CA (qualified as a CA in 2014)

I graduated from Edinburgh University in 2007 with a degree in International Business – and no idea what I wanted to do next!

After several years working in interesting but varied positions I decided it was time to seriously think about what career path I wanted to follow. After a lot of consideration, I felt that a career in accountancy would be interesting and rewarding. However, with no experience I did not really know where to start. I was lucky enough to have a few family members and a friend's parents who work for accountancy firms and so was able to pick their brains.

I realised that getting work experience was the best starting point as this would help me with job applications and also make sure that this was the career for me!

I was offered a summer placement with EQ in 2010 and spent 8 weeks working with the firm. This experience was invaluable and straight away I was given accounts jobs to prepare and I learned a lot in a short space of time. Following my placement, I was fortunate enough to be offered a CA training contract with the firm which I started in August 2011. As I don't have a relevant degree, I studied the TC level of the ICAS qualification via blended learning (a combination of block release and home study). I sat (and thankfully, passed) the TC exams in December 2011. I quickly realised all the talk of the amount of work required is most definitely not exaggerated! I studied for the TPS level of the ICAS qualification under the new modular block release system for this level. Studying for the first 2 papers over 9 months sitting them in June 2013 and completing the second 2 papers in December 2013 (and passing all 4). I completed (and thankfully, passed) the final level of the ICAS exams (TPE) and was admitted to membership in 2014.

EQ is a great firm to work for. I know they have a good reputation for staff training and confirm this certainly seems to be the case. There is always someone available to help you with any problems or queries, no matter how small or silly they may seem and you have the chance to work with a wide range of clients and businesses. There is also a great social aide to the firm, such as the chance to participate in charity events or the "summer" BBQ, sometimes in the pouring rain!

Senior (exam qualified and ex-summer internship student) – Kelly Meiklejohn BAcc (Hons)

Having had no previous work experience in an accountancy firm, I was a little anxious when I joined EQ for 10 weeks as a summer student. I applied and was invited to what turned out to be one of the friendliest interviews I have ever had! To my delight, I was successful in gaining a placement. The next few weeks flew by and suddenly it was my first day. I was pleasantly surprised at how quickly I was given the responsibility to complete tasks and made to feel like part of the team.

Everyone was more than happy to help, showing me the ropes (including how to use the complicated photocopier!) and answering any questions I came across when completing various jobs. I used a variety of different accounting software in order to process accounts, some of which I had previous knowledge of from university modules. I also had the opportunity to complete tax returns and tax computations which was very useful in supplementing my learning with my third year taxation module. I also enjoyed the fact that, within EQ's offices, there are juniors, seniors and managers all sitting together which allows you to gain various perspectives and work with people with different levels of experience. The summer placement is a great way to get an insight as to what accounting in practice is really like. It allows you to build on the knowledge you have gained in university and work on your practical skills.

As well as working hard, the staff at EQ also have a great social side. I was lucky enough to attend the annual staff barbecue while I was there on placement, which was great to get to know everyone outside of the workplace and thankfully it didn't rain that year!

An all round, extremely valuable experience and following my placement, I was fortunate enough to be offered a CA training contract with the firm and commenced CA training August 2013. I had a busy few years both in and out of the office with TPS study and exams. Thankfully I passed the first two exams at TPS level and passed the final TPE level, November 2015. I am currently waiting to be admitted to membership.

Junior (and former RGU placement student) – Samantha Ellis, BA (Hons)

Being an accounting student with absolutely no work experience is quite difficult, but thankfully going to RGU they give students the opportunity to undertake a 48 week placement throughout third year. I started my 48 week placement with EQ in June 2013 with only knowledge from my two years at University, and although this was useful, it was completely different to putting that knowledge into practice. Everyone at EQ was so patient and helpful, whether it was my letter writing or my debits and credits the wrong way round (both of which happened a lot in the early days!)

The majority of my work placement involved accounts preparation, and because no job is the same, each job brings its own difficulties. Even in the final weeks of my placement people were still happy to sit down and help me with these. Later in my placement I was completing tax returns and tax computations, which helped me greatly with my tax knowledge in fourth year.

Throughout my placement I participated in various training sessions for example, a bookkeeping course with ICAS and all internal training, including EQ's tax training programme and junior technical meetings. These really helped build on my knowledge from both University and what I had already learnt during my time at EQ. It also enabled me to improve on the quality of my work as I understood it better.

Another great part of my placement was the social events which happen quite regularly throughout the year, from the Christmas parties, and the staff BBQs to Go-Ape and Go-Karting. All of which, were great fun!

I was fortunate to have my placement extended and be offered a graduate training post, commencing August 2015, which I gladly accepted and I am glad to be back with EQ.

Summer Internship 2016 – Jodie Ovens

After applying through the ICAS site I had a quick response from EQ detailing the interview process. Before I attended the EQ interview I had previously accepted an internship with an Edinburgh firm but decided to attend the interview to make sure I was making the correct choice. At the EQ interview I felt an overwhelming sense of friendliness from HR and the Manager in attendance. The interview was calm and chatty and, dare I say it, even enjoyable. It was as much about me selling myself as it was the firm selling themselves to me. The opportunities and variety of projects on offer won me over; knowing I wouldn't be stuck doing audit work was a bonus! I accepted EQ's 6 week placement (which was extended by a further 4 weeks part way through my placement).

The first day at any firm is daunting; however, I was assigned a mentor who put me at ease from the start. Over the course of the 10 week placement I experienced progressive and challenging training. I had the opportunity to prepare the accounts of sole traders, partnerships, limited companies and towards the end a charity. I was given a lot of responsibility which I thrived on but any questions or difficult parts I had my mentor, and also my little pod of colleagues, to ask for help. Everyone was happy to help and it did not feel as though I was annoying or pestering them. No set of accounts were the same and I was excited to see how the next task would be different. In order to prepare the accounts, I had exposure to a variety of different software packages which I was glad to experience.

In my 7th week I got the opportunity to prepare tax returns and calculate sole traders, partnerships and corporation tax for some clients I had prepared the accounts for. I really enjoyed using the CCH software and would say this was one of my favourite weeks. As always, there was help on hand.

The office is a very sociable place. I often learnt about the personal lives of my pod and talked to other colleagues on my lunch hour. I was lucky enough to be asked along to a social event having only been working at EQ for a week or so. This shows their friendliness and commitment to make everyone feel as part of the team. One lunch time a group of colleagues and I had lunch at a local restaurant, again making me feel like an integrated part of the team.

I am extremely grateful to have been given this opportunity to work for EQ for 10 weeks and meet the people I did. It put my University theory into practice and confirmed my goal to become a chartered accountant. I will 100% be applying for a CA traineeship this year with EQ.