

resident business highlight

Submitted by SR resident Gina Valorz

Gina Valorz



Gina Valorz was born and raised here in San Antonio, TX. “I love the city and everything it has to offer,” said Gina. She has lived in Sonoma Ranch since 2011. She and her husband David have a blended family that includes Gina’s sons, Gregory and Steven, and David’s son, Phinney, and daughter, Fiona. “And you can’t forget Cassie, our dog, who is the family princess!” she joked.

Gina’s love of numbers rivals her love of San Antonio. She enjoyed an accounting class that she took in high school so much that she quickly researched how to pursue the degree in college at UTSA.

“My mother always stressed the importance of education and being able to take care of myself. I realized accounting was a career path that would enable me to support myself as well as a family,” she added.

While attending UTSA, Gina worked part-time for a sole proprietor CPA. It was that CPA who convinced Gina that she needed to take the exam to become a CPA, and settle for nothing less. After graduating from UTSA, Gina continued to work while studying and passing the CPA exam. She worked for KPMG and Coca-Cola Bottling Company of the Southwest. She joined Steven Bankler’s CPA firm in 1996 and Bankler Advisory, the investment advisory service of Steven Bankler’s CPA firm, in 2001.

Gina is now the managing partner for Steven Bankler, CPA, Ltd. and was elected to the position in 2020. She is responsible for managing the operations of the firm’s financial performance, personnel issues, business development, and more. Steven

Bankler is the firm’s founding partner and has served as a mentor to her over the years. Together, they’re taking Steven Bankler, CPA, Ltd. to the next level while also maintaining the company culture and creating a lasting foundation that will carry the firm into the future.

The firm only employs CPAs to perform all client work, which includes tax preparation, tax planning, and consulting. Most firms employ data entry staff, bookkeepers, or paraprofessional staff. “Our clients appreciate the fact that they can talk directly to a CPA anytime they have a question or need guidance,” Gina explained.

Most traditional CPA firms also require their staff to work excessive hours during tax season. Not Steven Bankler, CPA, Ltd. “We value our employees and their time, so we have established limits regarding the number of hours they can work in a week. We want our staff to be rested and actually enjoy coming to the office and working with our clients. she said.”

The firm’s clientele over the years includes recognizable names that are quintessential to San Antonio culture. Family-run and closely held small businesses with a minimum revenue of about \$1.5 million are their sweet spot because of the unique challenges those business owners face.

“We are a niche firm that services successful small businesses and their owners. We strive to provide



quality service in tax planning, asset protection, and exit strategies, and we focus on solving problems for our clients. We often inform new clients that there are better ways to structure their operations and to plan for an exit or succession strategy,” she told us. “We also have established tax planning strategies that many of our new clients have never considered before.”

An example is a succession plan recently prepared for a 50-year-old local family business transitioning to its third generation of ownership.

“We reconfigured their corporate structure to serve them as they move forward,” she explained. “It was a complex succession plan that went merely beyond filing their taxes. That’s what we love to do: uncover ways to help family businesses succeed. When we are entrusted with the opportunity to do that for local family businesses, even better!”



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