

# Meet BELAY

The Team Behind Your **Freedom**

A People-First Guide  
to the Humans Behind  
Your Success

# Meet BELAY

## The Team Behind Your Freedom

### **BELAY's Story: Built on People, Backed by Purpose**

For more than 15 years, BELAY has been the leader in virtual support — long before remote work was mainstream and long before the world realized just how powerful distributed teams could be. From the very beginning, our CEO Tricia Sciortino embodied that vision as BELAY's first-ever assistant.

She experienced firsthand what happens when a leader receives the right support: clarity returns, margin increases, and growth becomes possible.

As BELAY scaled and technology evolved, one truth remained constant: Our people are what make BELAY exceptional. While tools and platforms help streamline the work, it's the talent — the skilled, dedicated experts behind the screen — who create the freedom and excellence our clients rely on.

BELAY continues to innovate and lead the industry but never at the expense of what matters most. We remain a people-first organization because we know that leaders don't need more automations. They need the right humans in their corner.

This guide introduces you to a few of the people behind that promise.



# Meet Kacey

## YOUR EXECUTIVE ASSISTANT



Kacey Edwards is an Executive Assistant at BELAY with five years of experience partnering with C-suite leaders and growing organizations. She brings a steady presence and sharp judgment to her work, helping leaders navigate full plates with confidence.

### Q: What does a BELAY Executive Assistant actually do for clients?

*“My role isn’t just about clearing time in an executive’s day. It’s about amplifying their impact and empowering them and their teams to achieve more.”*

### Q: What makes you especially valuable to the leaders you support?

*“I think what makes me valuable to my clients is my ability to manage up and be the behind-the-scenes driver they need.”*

### Q: How do you approach supporting different leaders and personalities?

*“A lot of my work comes down to judgment and context. Knowing how to respond, when to step in, and when to stay behind the scenes.”*

**“My role isn’t just to clear time in an executive’s day. It’s to help leaders amplify their impact and lead better.”**

**- Kacey Edwards**  
BELAY Sr. Executive Assistant

**Q:** What's something you do that AI could never replicate?

*"Reading the room — not just the inbox, not just the task list, but the people. I can sense when an executive needs a push, or when they need space, or when something needs to be handled quietly in the background before it ever becomes an issue.*

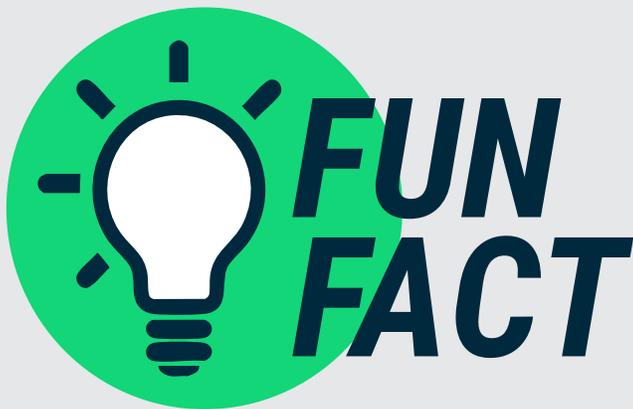
*"That kind of judgment comes from experience, context, and trust. Not automation."*



**Q:** Why did you choose to work with BELAY?

*"BELAY allows me to do meaningful and impactful work with clients I never would have met while working from home, and setting a schedule that prioritizes my family life.*

*"I can operate at a high level professionally without missing a beat at home. I don't have to choose — and that's why I love working at BELAY."*



Kacey is a huge college football fan. Rankings, recruiting, coaching changes, the transfer portal — if it impacts the polls, she's tracking it. She loves the strategy and the drama.

# Meet Bonnie

## YOUR DIRECTOR OF ONBOARDING



Bonnie Bennett is a Director of Onboarding for BELAY's Financial Solutions team. She is often the first relationship clients experience, guiding them through the transition into BELAY and setting them up for long-term success.

### Q: What does your role look like at BELAY?

*"I'm a Director of Onboarding, and I lead our onboarding client team. My role is really about being that initial relationship builder for new clients and making sure they have a great experience coming into BELAY Financial Solutions."*

### Q: What kinds of challenges do clients typically have when they come to you?

*"Most clients don't have structured financials when they come in. They often don't know what their margins are or really how their business is performing. There's usually a lot of uncertainty around the numbers."*

### Q: What changes for clients by the end of onboarding?

*"A lot of my work comes down to judgment and context. Knowing how to respond, when to step in, and when to stay behind the scenes."*

*"I really enjoy training people, working with people, and creating best practices. That's what fulfills me most in what I do."*

- Bonnie Bennett  
BELAY Director of Onboarding

## Q: How has your past experience shaped how you approach onboarding?

*“Earlier in my career, I spent time in audit, and in a way, an auditor is kind of an onboarder. You’re reviewing information, teaching process, and creating consistency.”*

*“I also had an experience where I trained a team overseas on month-end close and processes, and that showed me I really enjoy training people, working with people, and creating best practices — that’s what fulfills me most in what I do.”*

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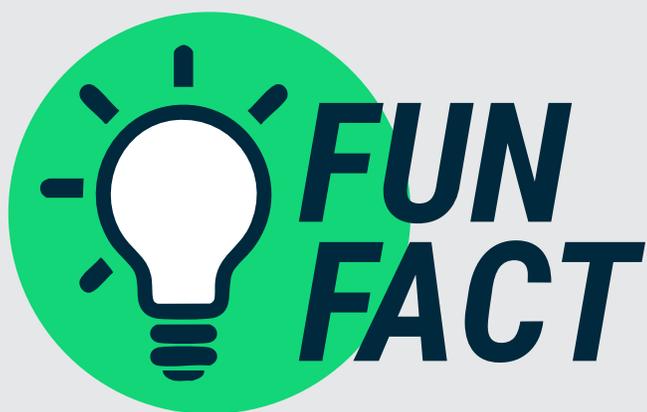
## Q: What’s something about onboarding that people might underestimate?

*“Onboarding is about finding level ground — creating clear procedures and helping people understand how things work. When you do that well, everything that comes after it is stronger.”*

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## Q: What’s something AI could never replace in your role?

*“Creating level ground for people. Onboarding isn’t just about organizing information — it’s about teaching process, understanding where someone is starting, and helping them feel confident moving forward. That kind of judgment, training, and relationship-building is very human.”*



Earlier in her career, Bonnie spent a month living and working in China, training a local accounting team and building relationships that still shape how she approaches onboarding today.

# Meet Cynthia

## YOUR TALENT SPECIALIST



Cynthia Lopez is a Talent Specialist at BELAY who plays a critical role behind the scenes: meeting our talent before clients ever do and ensuring the right people are brought into the BELAY community for the right reasons.

### **Q:** What does a Talent Specialist do at BELAY?

*“I bring in the talent needed to make an impact in our clients’ lives. I receive around 700 applications each month from people who want to be contractors with BELAY. I review their qualifications and assessments, decide who I want to interview, and invite them to schedule time with me.”*

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### **Q:** What happens during the interview process?

*“The interview is where applicants finally get to put a face to the name BELAY. I get to ask the right questions, dig into their experience, their technical skills, and their heart to serve. We’re continuously learning our clients’ stories and their challenges because it really helps us bring in the right talent to make them successful.”*

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### **Q:** What are you listening for when you talk with candidates?

*“I want to understand their background, their skills, and whether there are particular industries or interests they’re excited about.”*

*“Sometimes, they share something very niche, and I love being able to encourage them to keep an open mind. You never know what kind of industry a client may come from — it could very well be one of those.”*

**“We’re continuously learning our clients’ stories and their challenges because it really helps us bring in the right talent to make them successful.”**

Cynthia Lopez  
BELAY Talent Specialist

**Q:** How selective is BELAY’s process?

*“We only move 3% of applicants forward into contracts as BELAY Assistants to ensure we’re setting both sides up for success.”*

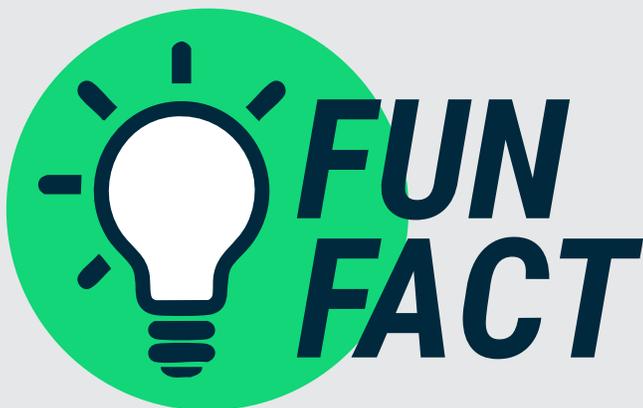
**Q:** How do clients benefit from your role?

*“Because we hear our clients’ stories and know their needs, I can start to envision the impact a potential assistant could make in a client’s life.”*

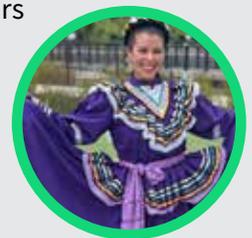
*“I’m constantly thinking about who would be a great solution for the leaders we serve and making sure we maintain the quality our clients rely on.”*

**Q:** What do you love most about your job?

*“During interviews, when I hear amazing answers or learn about someone’s interests or the industries they’re passionate about, I start thinking, ‘Yes, there are clients who would be a great fit for this person.’ Being part of that is incredibly exciting.”*



Cynthia has been dancing Mexican ballet folklórico since she was four years old. After taking a break, she’s returning to it as an adult and is excited to pour that passion back into her local community.



# Meet **Jonah**

## YOUR ACCOUNTING MANAGER



Jonah Ebenhoeh is an Accounting Manager at BELAY who oversees client relationships across day-to-day bookkeeping and month-end close. He works closely with staff and senior accountants to ensure financials are accurate, so clients can trust the numbers they're using to run their business.

### **Q:** What does an Accounting Manager do at BELAY?

*"I oversee the full client relationship from an accounting standpoint. That means making sure the day-to-day bookkeeping is getting done and done accurately, overseeing month-end close, and reviewing the final financials before they're sent to the client."*

*"I also act as a senior accountant for some clients, especially around revenue recognition and cost of goods sold."*

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### **Q:** What prepared you for this role?

*"I'm not a classically trained accountant. I started from the ground up — entering invoices, helping with payroll, and learning what journal entries were along the way."*

*"I've worked across a lot of different industries, from property management to food and beverage to retail. That variety helped me understand how different businesses work and what owners actually need from their financials."*

**Q:** What's been rewarding about working with clients?

*"Watching clients grow and figure things out along the way."*

*"One client I work with is a prenatal vitamin and supplement company that's still relatively new. Seeing them navigate their market, understand their pricing, and grow with confidence — and being part of that process — has been a lot of fun."*

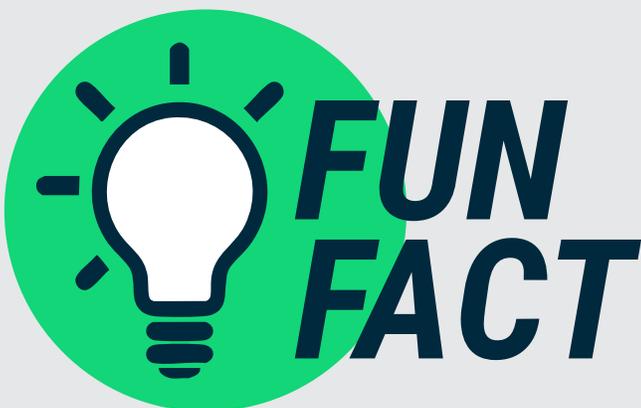
**"I've been on the side of trying to make a budget work — not just reporting that it's off — and that helps me understand where business owners are coming from."**

Jonah Ebenhoeh  
BELAY Accounting Manager

**Q:** What's something AI can't replace in your role?

*"For me, it's perspective. I've been on the side of trying to make a budget work, not just the person saying, 'We're over budget.'"*

*"That experience helps me understand where business owners are coming from and how they're thinking about their numbers."*



Jonah didn't originally plan to work in accounting. He started his career on the tennis court and was once a Director of Tennis at a country club before discovering he had a knack for accounting and business operations.

# Meet Anthony

## YOUR MARKETING ASSISTANT



Anthony Nelson is a BELAY Marketing Assistant with nearly three years of experience supporting leaders and business owners who want to move their marketing forward without feeling overwhelmed.

### Q: What does a BELAY Marketing Assistant do for clients?

*"I help clients stay organized, show up consistently in their marketing, and move their communication forward in a way that feels manageable."*

*"A lot of leaders are carrying a heavy load, and my role is to make sure marketing doesn't add to that pressure."*

### Q: How do you approach supporting different leaders and personalities?

*"A lot of my work comes down to judgment and context. Knowing how to respond, when to step in, and when to stay behind the scenes."*

### Q: What strength do you bring to the leaders you support?

*"I'm really strong at seeing the big picture and then breaking it down into clear details. Clients often know what they want to achieve, but marketing can feel so scattered. I help organize ideas, systems, and tasks so that clients know exactly how to get there."*

**"I help take scattered ideas and turn them into a clear direction, so clients can move forward with confidence."**

- Anthony Nelson  
BELAY Marketing Assistant

## Q: What's something you do that AI could never replicate?

*"We're seeing this everywhere. AI can process information, but it can't read a person. It can't understand tone, context, or what a client actually needs in a given moment. Discernment matters."*

*"AI also can't build trust. Relationships are built by listening, understanding pressures, and showing up consistently. That personal, human connection is something technology can't replace."*



## Q: What do you enjoy most about supporting clients?

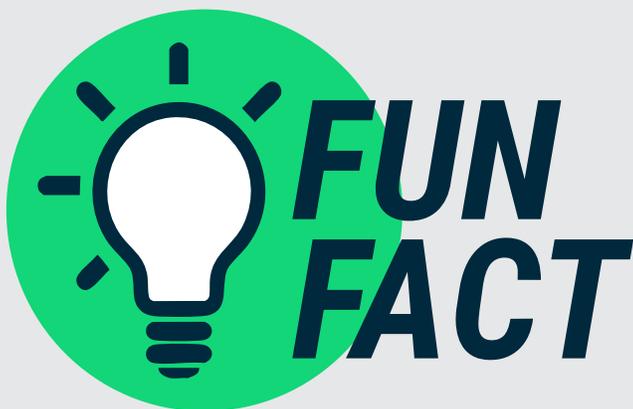
*"There's always a moment where the pressure lifts. Early on, everyone is figuring each other out, especially if a client has tried different marketing solutions before or done it all themselves."*

*"Then there's this shift where they realize they have someone in their corner handling it all behind the scenes. They get to do other things that bring them more joy, and that's the moment I love the most."*

## Q: Why did you choose to work with BELAY?

*"BELAY's mission aligns with how I believe work should be done. BELAY values people, excellence, and intentional support."*

*"What stands out most to me is the heart behind supporting leaders. So many leaders are carrying more than people realize, and BELAY creates the space for them to focus on what truly matters by surrounding them with the right support."*



Anthony is an exceptional cook — and not just in a “dad-on-the-grill” way — in the Gordon Ramsay way. From flavor to presentation, cooking is one of his favorite creative outlets!



# Meet Marcus

## YOUR BOOKKEEPER



Marcus Reed is a Bookkeeper at BELAY with several years of experience supporting small businesses, nonprofits, and mission-driven organizations. He helps clients bring order and clarity to their finances so they can make confident decisions without carrying constant financial stress.

### Q: What does a BELAY bookkeeper actually do for clients?

*“A lot of my work is about creating stability. I make sure the books are accurate, up to date, and consistent month after month. But just as important, I help clients really understand what they’re looking at. When the numbers are clear and reliable, clients don’t feel like they’re guessing anymore.”*

### Q: What do clients usually feel when they first come to BELAY?

*“Mostly general overwhelm. They know their finances matter, but they’re not totally confident in the reports they’re getting — or they don’t really know what the numbers are telling them.*

*“There’s often a lot of wondering, ‘Are we okay?’ That’s where I come in.”*

### Q: Why did you choose to work with BELAY?

*“BELAY puts people first — both clients and the professionals supporting them. I love that I get to build real relationships with clients and do work that genuinely helps them.”*

*“I help clients really understand what they’re looking at. When the numbers are clear and reliable, clients don’t feel like they’re guessing anymore.”*

- Marcus Reed  
BELAY Bookkeeper

## Q: What's something AI or accounting software can't replace in your role?

*"Understanding the story behind the numbers. Software can organize data, but it doesn't know the client or what they're working toward."*

*"Because I know their business, I can explain why something changed, whether it's expected, and what it might mean for what's next."*

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## Q: What's been most rewarding about working with clients?

*"Seeing them use their financials with confidence. There's a big difference between having reports and actually trusting them."*

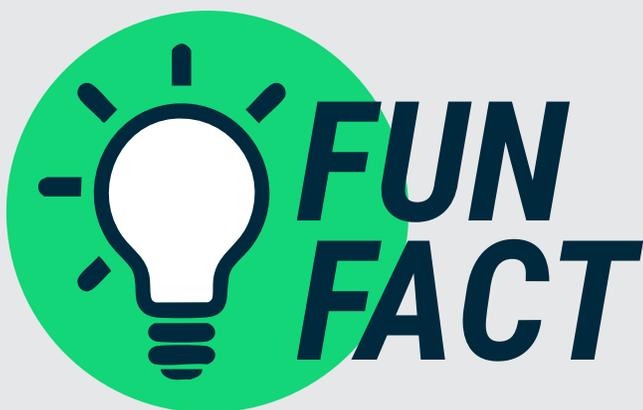
*"I've had clients tell me they finally feel comfortable presenting financials to their board or that they're confident enough to take a big next step, like hiring, expanding a program, or investing in growth, because they know they can afford it. That's when they realize the numbers are no longer a source of stress."*

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## Q: What does financial clarity look like in real life for your clients?

*"It's when clients can actually see what's happening in their business."*

*"They know where the money is going, what they can afford, and where they need to pay special attention. All of that makes decisions feel a lot less heavy. They can finally move forward with confidence."*



Marcus restores old wooden furniture in his garage on weekends. He loves bringing new life to old pieces, usually with a podcast playing in the background.

# Meet Dahiemma

## YOUR CLIENT SUCCESS CONSULTANT



Dahiemma Smith is a Client Success Consultant at BELAY who walks alongside clients as they grow. She acts as a guide and advocate, helping them work through challenges and move forward with clarity so they can focus on what matters most.

### Q: What does a Client Success Consultant do at BELAY?

*“My role directly supports the client experience. When a Client Success Consultant shows up, clients know they have an advocate and a partner.”*

*“We help ensure their goals are met, navigate challenges, offer best practices, and provide suggestions to help them move from one stage of their business to the next.”*

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### Q: What do you love most about your work?

*“I love when clients tell me, ‘I’m so happy I don’t have to think about that anymore,’ or share that they’re finally able to take a vacation or spend time with their children.”*

*“It’s such a great feeling to know we’ve addressed those pain points – the things that have been keeping them up at night – and I’m part of the solution. It’s wonderful to be a part of it.”*

**Q:** How do you support clients through challenges?

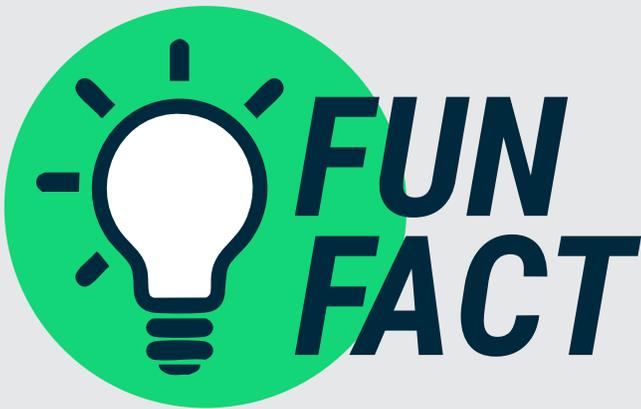
*“We focus on providing options and being a resource. We don’t say no very often – we have so many ways to say ‘yes.’*

*“Being able to help clients navigate challenges and move forward with confidence is one of the best parts of the role.”*



“It’s such a great feeling to know we’ve addressed those pain points – the things that have been keeping them up at night – and I’m part of the solution.”

Dahiema Smith  
BELAY Client Success Consultant



Dahiema is a proud plant enthusiast and is slowly turning her home into a jungle. Watching her houseplants grow and thrive is one of her favorite forms of therapy and brings her a lot of joy.

# Meet Aubrey

## YOUR ACCOUNTING DIRECTOR



Aubrey Schmidt is an Accounting Director at BELAY with more than 17 years of experience in the accounting industry. She leads client teams, oversees service delivery, and ensures BELAY's financial work continues to meet the evolving needs of clients and the businesses they're building.

### Q: What does an Accounting Director do at BELAY Financial?

*"I oversee both clients and teams. I lead a number of client engagements, manage people and team development, and review our processes and deliverables to make sure we're doing the best possible work for our clients. A big part of my role is continuously looking at what we're delivering and how we can improve it."*

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### Q: What experience do you bring to this role?

*"I have both a bachelor's and a master's degree in accounting and have been a CPA since 2008."*

*"I started my career in audit at KPMG, then spent about a decade in corporate accounting, including helping startups establish accounting policies and procedures. For the past several years, I've been focused on client service and supporting growing businesses."*

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### Q: What's one thing your teams offer that AI can't ever replace?

*"I think it comes down to drive. We really want to do the absolute best for our clients. Listening to them, understanding what they need, and giving them everything I can is just part of how I'm wired — and that shows up in how I support clients."*

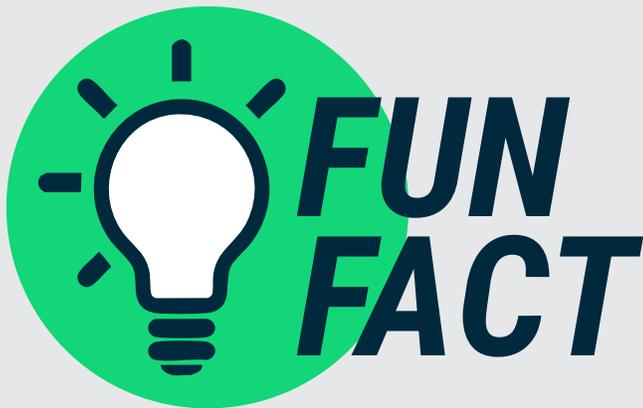
**Q:** Can you share a client's success you've been part of?

*"One long-time client, Ritual Beverage, experienced significant growth in the non-alcoholic beverage space and was eventually acquired by Diageo.*

*"We worked closely with their finance team, providing clean financials and consistent communication, and helped support the transition during the acquisition process. It's been really meaningful to be part of that journey."*

**"I really want to do the absolute best for our clients — listening to them and giving them everything they need."**

- Aubrey Schmidt  
BELAY Accounting Director



Aubrey has been an athlete her entire life and is highly competitive by nature. Volleyball is her favorite sport — it's how she met her husband — and she still plays in adult leagues today. She's also a proud dog mom with a growing pack of dachshunds.



# But That's Not All:

## YOUR FULL BELAY TEAM AT A GLANCE

Our scalable service model allows organizations of various revenue ranges to experience the robust accounting support they need as they grow or become more complex. **Examples include:**



### ASSISTANT SOLUTIONS

- Executive & Personal Management
- Leadership & Time Management
- Operations & Process Ownership
- Marketing & Brand Execution
- Content & Communication
- Sales & CRM Execution
- Technology, AI & Automation Management
- Team Coordination & Scaling



### FINANCIAL SOLUTIONS

- Bookkeeping & Financial Operations
- Month-End Close & Financial Reporting
- Full-Service Accounting Teams
- Payroll & Tax Services
- Financial Oversight & Controls
- Budgeting, Forecasting & Cash Flow
- Inventory & Cost Management
- Strategic Financial Leadership

Whether you need help in one area or a fully integrated support team, BELAY builds a solution around your business, so you get the expertise you need without the overhead of hiring in-house.



**BELAY**

ELITE TALENT THAT FREES LEADERS TO FOCUS