

An Accountant's Take on Mental Health and Well Being in the Workplace

By Shahrukh Shah, CPA



Shahrukh (Shak) is a CPA with over 16 years of experience in accounting and finance. He has previously worked for a Big4 accounting firm in progressive roles starting with the audit practice and moving into the Transactions Services space. Shak was diagnosed with bipolar disorder in 2016 and through his recovery process has become a passionate mental health advocate. Today Shak manages his own independent consulting practice and has learned to live and thrive with being bipolar.

My CPA journey likely sounds similar to many others who have joined the profession out of university. I graduated in 2006 and landed an audit associate role at one of the Big 4 accounting firms in downtown Toronto. Over the course of the next 11 years, I worked my way up the ranks. It was hard work, but rewarding; I thrived on the networking, travel and even the many late nights in the office alongside my peers.

To fully appreciate how my story unfolded, you can begin with my roots as the son of an extremely hard-working single mother who was a low to middle income earner. She sacrificed everything for her son's future. This is where I drew much of my motivation to strive for big goals and to make my mother proud of my achievements.

In many ways, I was an adrenaline junkie. I actually found the intensity of the deals and the consulting work I was doing in my later years quite rewarding, and I fed off the energy from the highs to help power me through those experiences. I also thrived in the late-night partying culture that was prevalent at the accounting firms at that time.

What my teams did not always see was the inevitable crash at the end of an intense project or even in the middle of those projects on the weekends or on my vacations. I chalked it up to my body just needing some extra sleep or downtime to recharge the engines. In hindsight, I was ignoring many of the signs that my body and mind were sending me.

Mid-way through 2016, I was told that my name was going to be put forward for the partnership process – a CPA's dream, right? That's when it happened.

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And Then I Crashed

In late 2016, I attended a leadership conference and had my first psychotic episode, which led to a bipolar disorder diagnosis. I have often been asked what a psychotic episode even means. In my case, during the tail end of the conference, I began to be overwhelmed by my feelings and started to create a storyline in my head that was removed from reality. I had elements of hallucinations and severe paranoia building up about the intentions of the

people surrounding me. From my perspective, it was frustrating that people were not seeing the things I was seeing but, when I was speaking to those individuals later, it became clear that it was very scary from their point of view as well. To complicate things, I was in Europe when this all happened and my employer had to rush me back to Toronto, escorted by an emergency psychiatrist, and straight into the emergency room.

In all honesty, my first reaction was: what does this even mean and how can I cure this to get back to my “normal” way of life? And most importantly, how do I get back into the partnership process?

Over the next 18 months, I struggled to come to terms with my diagnosis, and even had another psychotic episode at work. It was at that point that I knew I had to take a hard look at my health and what I needed for myself.

Being My Best Self

It hasn't been easy, but what I can say is that I have learned more about myself and what I need for my own wellbeing in the past five years than I had in all the years before. I realize today that “normal” for me is a state of happiness and making time for the things that really matter in my life, centring around my ability to enjoy life to its fullest.

I did not ultimately stay with the Big 4 firm where I was employed, but am excited about starting up my own practice and using work to serve my purpose by inspiring myself and others to be their best self.

Here are a few things that I have learned about myself that may be useful to share in case they resonate with you or someone you know.

1. **Don't be too hard on yourself:** Initially I found it difficult to adjust to not being able to overcome some of the mental blocks that were consuming my mind. I was frustrated and angry with myself for not being able to just shake it off. Learning to let go (or at least minimize) that frustration helped tremendously in my recovery and learning to live with being bipolar.
2. **Set small goals:** It took me a while to realize that I didn't need to save the planet or get back to what I knew as “normal” overnight. Once I started to set goals as small as taking out the garbage to working a 9 to 5 workday, I started to feel a sense of accomplishment and was eager to start working on the next set of goals.
3. **Own your recovery:** I was lucky to have a strong support system surrounding me to help me get back up on my feet. The turning point in my recovery, however, was when I stopped being an observer and consciously took responsibility for making the changes in my life that I knew were needed to help me become as mentally fit as I could be.
4. **Be open to the advice your medical team is giving you:** At first, I struggled to reconcile advice from my doctors with conflicting advice from family and friends. I learned over time that, although your family and friends want what is best for you, they sometimes have a hard time understanding what is being said by the doctors and may provide you with advice based on their own life experiences or limited understanding of your condition. I have achieved a healthy balance over time by hearing what my doctors are saying and incorporating the aspects/medications that make sense to me, while making

my own tweaks that work better for my lifestyle. I educated myself on what living with bipolar really meant.

5. **Embrace the good with living with being bipolar:** While there are certainly things to monitor and be aware of when living with being bipolar, it is a bit of a pet peeve of mine that the word disorder is used to describe this condition. There is a lot of creativity and genius that comes from some of the science behind being bipolar that isn't stressed enough. I truly believe that many of the great things I have been able to achieve in my life are actually a by-product of the so-called chemical imbalances associated with being bipolar. Though my initial reaction was "Oh no is my life over?," I can humbly say that today I am filled with optimism about both my professional and personal future.



6. **Be willing to show vulnerability:** Like many men, I always found it difficult to show emotions of vulnerability and often put up a wall or a tough guy front to protect myself. Over time, this resulted in a fear of failure and not wanting to disappoint my loved ones. I never really spoke with them about my feelings or had those deep conversations, and I definitely did not seek any professional help. I truly believe that a major factor in my recovery process was my ability to be more vulnerable and to begin to put aside my pride to seek the help I needed. What I learned through this process is that, for those who truly love and care for you, nothing takes away from their willingness to help you and, in many cases, it strengthened my existing relationships.

7. **Show your gratitude:** I can't tell you how important this was to my recovery, while also allowing me to strengthen existing relationships with family and friends. From a simple "I love you," or a "thank you," to letters, I found it very therapeutic to express my gratitude to all the people who made a difference in my recovery. The conversations I was able to have with my mother leading up to her passing away last April really were instrumental in helping me through the grieving process, just to know I had expressed my gratitude to her for all she had done. The analogy I like to use is: think about what you would tell people you love in their eulogy and just say it to them while they are alive.

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Help Is Available

I have been asked many times over the years if there was something either myself or my employer could have done to prevent or mitigate what transpired with my mental health. The honest truth is I don't know and never will.

The following discussion is based on my personal opinions as someone who has experienced mental distress and it should be noted I am not a trained professional in the mental health space. But below are a few of my observations on the things I believe employers are doing well today.

- 1. Employee Assistance Programs (EAPs):** I will admit that I never fully appreciated the tools that were available to me when I was working at a big firm. I can assure you that many employers do use an EAP in their mental health programs, and there are many valuable tools available to those who need them. They include, for example, literature around stress management and access to real-time counselling services for employees and any family members who are experiencing personal or mental health difficulties. I would encourage you to familiarize yourself with the tools available through the EAPs and do not hesitate to use them. These services are confidential and are typically available 24 hours a day, seven days a week.
- 2. Wellness/ flexible time-off days:** From my discussions with my peers, it does appear that many professional practices and large corporations offer their employees some flexible time-off days to utilize without providing a reason for the absence. Many encourage you to take this time off for your wellness and to focus on your mental health. I know things can get busy with work but do not forget to consciously use these days by focussing on wellness activities that will recharge you.
- 3. Short-term and long-term disability leaves (STD and LTD):** Many organizations offer these programs and I would advise you to pay attention to the benefits you sign up for as there is often an opportunity to increase your coverage. After both my psychotic episodes, I was placed on STD leave. In both instances, I was sent to the hospital in the psychiatric unit and did not actually realize I was on leave until a few days into my hospitalization. What is great about these programs is that a portion of your salary (often times 60% or more) is covered while you are on leave. Generally, a STD leave can last up to three to six months and then, if you still require time off, you are placed in the LTD leave program. It is comforting to know that a portion of your salary is covered to ease the mental strain of the financial hardship while you focus on your recovery.
- 4. Well-being training programs:** Many organizations are beginning to understand the importance of mental health and wellbeing and are starting to offer employees (not just leadership teams) programs to help them manage their stress through tools such as resilience and mindfulness. It is a great start and I would encourage organizations to continue down this path and keep expanding what is being offered.



Overall, although it pleases me to see the progress we have made the past several years, there is still much work to be done.

More To Be Done

When I reflect on what organizations could be doing better, I truly believe that many organizations' hearts are in the right place. Below are my observations from my personal experience.

- 1. Emotional Intelligence:** The first thing I noticed upon my return to work was the hesitancy of people to have an open dialogue with me on what I was going through. Like many of those who face return-to-work situations, I felt lost and even felt useless, like I wasn't contributing to the team. For many months, my supervisors and peer group members walked on eggshells around me and it took me being vulnerable to truly begin to break down those walls and have that open dialogue with those around me. Organizations need to continue to offer more emotional intelligence training to their leaders and their staff to build trust within teams and encourage open dialogue to help those facing mental health challenges navigate these often devastating times of their lives.
- 2. Leave of absence:** During my leave of absence, I only dealt with the EAP provider and the insurance provider; they required weekly and sometimes daily check-ins to see how my recovery process was going and, ultimately, when I would be ready to return to work. This was quite stressful for me as honestly my breakdown was so significant that I had no clue what was going on with myself, let alone when I thought I would be ready to return to work. I would encourage organizations to work with their EAP providers and insurance companies and develop a more empathetic approach to the leave of absence process to better aid in recovery.
- 3. Return to work:** The transition back to work can be daunting. Oftentimes it is HR that communicates with the employees and develops their return-to-work program. In my opinion, it is critical for the bosses/supervisors to also be involved in this process as they have already built a certain level of trust with such employees and, if they are equipped with the tools and training, will be able to have an open dialogue with those employees on what they need for a return-to-work scenario. The first 30 days are critical to make those employees feel welcomed back and to talk through any anxieties they may feel from being back at work. Open dialogue can also help the employers and employees determine whether a phased approach, such as working one to two days a week, is required initially before the employees return to a full-time schedule and workload.
- 4. Mental health of other employees:** Through my experience and that of my fellow teammates, it was interesting to see the contrast between my two leaves of absence and return-to-work scenarios. During the first leave, the other employees were kept in the dark as to what was going on with me out of respect for my privacy. I learned from many, as I opened up about my story, that they too lost sleep over what was happening with me and felt powerless as to how they could aid in my recovery. During my second leave, however, my boss took the initiative to bring in a workplace psychologist to speak to the team to help answer their questions and walk them through what I may be going through as someone with a bipolar disorder diagnosis. I heard from many of my peer group that this was immensely helpful to their mental health and to better prepare them for interactions with me upon my second return to work.

Overall, although it pleases me to see the progress we have made the past several years, there is still much work to be done. I look forward to being an advocate for mental health and being a voice for those who are not ready to speak up for themselves as they struggle in their day-to-day and work environments.