

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Aug. 29, 2007

40 Under 40 Honoree: Nancy Lee, MBA, BBA — 36

ProAdvisor Program Manager, Intuit, Inc., Mountain View, CA

**EDUCATION:** MBA — UC Berkeley

**FAMILY:** Happily taken with a boyfriend of many years.

**HOBBIES & INTERESTS:** traveling (has visited more than 30 countries and has lived in Nigeria, Singapore and Turkey), sports (especially tennis & golf), gardening

**What's the one piece of technology that MOST helps you get through your normal workday?**

“Boring as it may sound, I would be completely inoperative without Outlook, both in terms of communicating with my customers and teammates, as well as managing my calendar and the tasks that I need to get done.”

**What will be the biggest change over the next five years in the ways tax and accounting firms operate?**

“In the next five years, I think a couple of things will continue to pick up momentum:

- **Shift to a paperless society.** We are increasingly living in an electronic world — tax prep forms are being prepared online, accounting software is replacing paper and pen.
- **More and more remote work is being done.** After the initial relationship is established, more and more interactions between

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

to accountants and their small business clients. Her team also manages alliances with the Small Business Development Centers across the country to deliver training that helps small businesses succeed.

**[Return](#)**  
**[to 40 Under 40 Honorees](#)**

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved