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Aug. 29, 2007

**40 Under 40 Honoree:** Tracy Gaspardo Mortenson, JD — 36  
Executive Editor, CCH, a Wolters Kluwer business, Riverwoods, IL

**EDUCATION:** BS Accounting — University of Illinois; JD  
— Georgetown University Law Center

**FAMILY:** Husband Michael; Sons Lucas (5) and Mitchell (4)

**HOBBIES & INTERESTS:** painting, tennis, reading/writing,  
traveling, wiping noses & getting juice

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

"There are actually two pieces of technology that I could not live without. The first is my BlackBerry. The other day, I responded to a customer, approved a hiring and revised a presentation, all from the bleachers at my son's Little League game. My BlackBerry not only allows me to be more efficient, but it helps in my struggle to maintain the work-life balance that is precious to us all. My second lifeline is CCH@Hand. Through the CCH@Hand console, I can perform tax research without any interruption to my daily workflow. I can search multiple sources — Google, my desktop, TRN and key industry websites — without leaving the PowerPoint or Word document I am creating, and then easily integrate my search results into my work product. We're all looking to maximize efficiency, and CCH@Hand is an invaluable partner in this effort."

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

"We will see an even greater reliance on technology as firms struggle to respond to staffing shortages caused by the impending demographic shift.

As baby boomers retire, there will be a need to recruit, hire and train at a

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### **What Tracy's peers had to say about her:**

Tracy's previous experience as both a tax attorney and senior tax consultant at PricewaterhouseCoopers provide her with the perfect insight into customer's needs because she was one. She is often a clear, practical voice of direct experience when we are developing products or enhancing existing lines. This perspective, combined with her natural enthusiasm and intellect make her a charismatic and innovative leader.

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Technology

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