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*From the Sept. 2006 Issue*

As the accounting profession ages and the “old guard” that helped usher technology into public accounting prepares to close out the books on their careers, the profession will soon turn to a new cadre of leaders to steward the continued evolution of technology in the practice.

**Related Article: [40 Under 40 ... and the Need to Rethink the Future](#)**

A downswing in the number of newly-minted accountants during the 1980s and 1990s resulted in a nearly generation-wide gap and leaves those in between with the responsibility of mentoring and guiding their fellow practitioners. This comes through demonstrating best practices in their work product as well as through their devotion to client service.

Who are they? What drives them? How are they fostering the growth and continued betterment of the accounting profession? What is it that makes them stand out and above the crowd? The following 40 were recognized for their current leadership in and around the field of public accounting, and for the role they appear ready to assume in guiding the profession into the future.

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#### Andrew Hatfield– 31

**Chief Strategic Officer, Acct1st Technology Group LLC, Dallas, TX**

Andrew has applied the expertise he gained in document management for education and other industries to advance tax and accounting processes within firms.

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#### Andrew Spillum, CPA – 39

**Partner-in-Charge (Phoenix office), Eide Bailly, Phoenix, AZ**

Andy Spillum has been moving upward and onward since the day he arrived at Eide Bailly LLP. He is a respected leader for the Firm and an active mentor for staff

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[Review](#)

#### Bob L. Lewis, Jr., CPA.CITP

– 36

**Sr. Marketing Manager, Accounting Professionals, Microsoft Business Division, Redmond, WA**

Bob is an accessible leader within Microsoft who actively listens to and understands the needs of the profession.

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#### Brent Baccus, CPA – 32

**Senior Auditor, Washington, Pittman & McKeever, LLC, Chicago, IL**

Brent is an endless source of giving. From his work with the Illinois CPA

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Brian is a creative, innovative individual who is making a significant contribution to the practice of public accountancy by bringing the audit confirmation process into the 21st century.

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[Review](#)

#### [Brian A. Lint, CPA – 32](#)

**President, Owner, Partner, Brian A. Lint, CPA, PC, Lee's Summit, MO**

Brian runs his own successful CPA firm with a staff of eight and always takes the time to truly understand client needs, and serves as an excellent example of professionalism to his staff and clients

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#### [Brian Steinert – 32](#)

**Product Manager for CCH, a Wolters Kluwer business, McPherson, KS**

Brian approaches everything he does with the big picture in view. His experience in accounting, auditing, consulting, standards development and technicaltechnology training has helped him to develop a skill set that allows him to approach finding solutions from a unique and creative perspective.

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#### [Brian Swanson – 30](#)

**Partner, Visionary Marketing, Palatine, IL**

Brian has been helping CPA firms understand and conduct business development for seven years. He teaches firms how to better use e-mail

communications as a primary marketing tool for their firms.

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promotes the CITP designation and the role of an IT trained CPA in the marketplace.

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**Christy M. Snow, EA, CTEC –**

**35**

**General Partner, Snow's Financial Services, Orange, CA**

Christy is very dedicated to doing all that she can to help her clients by working hard and completing tasks quickly, efficiently and correctly.

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**Craig Downing, MBA – 35**

**VP & General Manager, Sage Software, Pleasanton, CA**

Craig is a technologist, passionate about empowering small businesses around the globe with business management solutions that enable them to compete with their largest of rivals.

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[Review](#)

**Dave Wyle, CPA.CITP – 34**

**President & CEO, SurePrep LLC, Newport Beach, CA**

Dave is described as hard working, driven, dependable, fun loving, generous and fair, and his work ethic clearly demonstrates this. Prior to founding SurePrep, Dave was the CEO and founder of ePace! Software.

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### [David Futcher, CPA – 35](#)

#### **Shareholder, Futcher-Henry CPA Group, Kelso, WA**

Aside from being very tall, David is an intelligent person who cares about his family and helps his community. He is hard working, resulting in him becoming a partner in his firm by the age of 29, and he bought out his former partner two years later.

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### [Dawn Willis, MBA, CFP, CSA –](#)

[34](#)

#### **Manager, Advisor Practice Development, H.D. Vest, Irving, TX**

Dawn is able to quickly connect with a lot of different types of people; to her, everyone's a friend. If she were a baseball player, she would be the utility infielder, noted one friend, because she can play many different positions and thrive at every one of them.

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### [Geraldine "Gerri" Lazarre, CPA,](#)

[MST – 29](#)

#### **Managing Partner/Owner, TriMerge Consulting Group, Miami, FL**

Gerri is an exceptional and phenomenal woman. She is driven, goal oriented, focused and a consummate professional. Her thorough understanding of her

field and the confidence she conveys conveys to clients brings them peace of

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accounting firm of Sielschott & Walsh CPAs, Inc. since 2001.

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### [Jason Smith, CP, CVA – 35](#)

**Partner, Smith, Burch & Company, LLP, Elberton, GA**

Jason is a constant leader in our community and with the Georgia Society of CPAs. Along with handling our most valued clients, Jason is also actively involved in our community through the Rotary Club, The Elbert County Chamber of Commerce...

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### [Joe Woodard – 38](#)

**President, Creative Financial Software, Canton, GA**

Joe is very outgoing and gets to know people quickly. For an accountant, he is not very left brained; he is actually quite artistic in many of his endeavors.

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### [Kimberly Rice, CPA, MST – 38](#)

**Vice President and Managing Director, Titus, Chicago, IL**

Kim is very ambitious, highly motivated and driven to be successful. She cares about people and helping clients solve their problems, and is equally interested in her team members, which makes her a great leader who is dedicated to the people it takes to build a great company.

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**Louis Stratton, CPA.CITP, MBA**

– 35

**Principal, Meador Stratton, LLP, Highland,  
IN**

Louis is a leader in the accounting software market. With his CPA background, he is able to use his expertise in providing clients with not only tax services.

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**Mark Schlageter, J.D. – 39**

**Executive Vice President & General Manager, Research and Guidance Group,  
The Thomson Corporation- Division: Thomson Tax and Accounting, NY, NY**  
Mark has a strong background in business development and strategy.

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**Megan Durst, CPA, MSA – 26**

**Manager, McLain, Hill, Rugg & Associates, Inc., Zanesville, OH**

Megan is active in community and professional organizations. She just completed a term as an Executive Board member of The Ohio Society of CPAs, Tax Committee member of the Ohio Society of CPAs...

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**Myra Quon Kwok, CPA – 34**

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Pam is very passionate about helping entrepreneurs run their businesses more effectively through the use of financial information. It often seems foreign to the small business owner and so her goal...

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#### **Rebecca Machinga, CPA – 36**

**Shareholder, WithumSmith+Brown, PC, Princeton, NJ**

Superwoman doesn't go far enough. Rebecca handles every aspect of her working life with utter calmness, efficiency and grace. To her clients, she is totally reliable and completely irreplaceable, answering every need ——— expected or unexpected.

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#### **Ria Botzler – 29**

**Owner and Principal, Checks & Doublechecks, Albuquerque, NM**

Ria is passionately devoted to helping small and micro businesses succeed. She writes a newsletter for her clients each month that highlights aspects of good small business practice and also contributes to other association and business newsletters.

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#### **Ryan McCowan, CPA.CITP – 34**

**Partner, Greene & McCowan, CPAs, London, KY**



Ryan is a proven leader in the tax and accounting profession. His firm represents

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Sasan is a motivator, sets a high bar, always focused on the customer, leads by example, and builds a talented and engaged team.

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#### [Scott Huebert, CPA – 33](#)

**Project Manager, Finley & Cook, PLLC, Shawnee, OK**

Scott works hard to maintain good relationships with clients and coworkers. Scott has been an outstanding asset in assisting in the implementation of his firm's not-for-profit and governmental accounting activities.

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#### [Scott Ogle – 31](#)

**Chief Operating Officer, Sageworks, Inc. – the maker of ProfitCents, Raleigh, NC**

Scott is a tremendous professional who exemplifies above-and-beyond dedication to customers. He also has a true passion for helping others, which shines through his actions on a daily basis...

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#### [Scott G. Price, CPA.CITP, CIA, CISA – 30](#)

**President, SAS 70 Solutions, Inc., Tampa, FL**

Scott is a bright, hard-working professional with excellent client relationship skills. His upbeat positive attitude, entrepreneurial spirit and decisive decision

making are attributes that have led to his successful rise in the industry.

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[Susan Roberts, CPA, MST – 37](#)

**Sr. Tax Manager, Sanford, Baumeister & Frazier, PC, Ft. Worth, TX**

Susan is a multidimensional professional and an emerging leader in the profession. She is bright, very energetic and driven, which has led to her success as senior tax manager...

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[Teresa Mackintosh, CPA.CITP  
– 34](#)

**VP Marketing, Thomson Tax & Accounting, Dexter, MI**

Teresa has a strong work ethic and is dedicated and driven to succeed both academically and professionally. She is a good listener, honest, fair, and dedicated to the needs of her colleagues and clients.

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[Tracy Gaspardo Mortenson, CPA,  
JD – 35](#)

**Executive Editor –State Tax, for CCH, a Wolters Kluwer business,  
Riverwoods, IL**

Tracy's previous experience as both a tax attorney and senior tax consultant at a big accounting firm provide her with the perfect insight into customer's needs because she was one.

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## [Will Breiholz – 36](#)

**General Manager, BQE Software, Inc., Torrance, CA**

Will is devoted to helping small businesses and their accountants, and he really sets himself apart by bringing an additional skill set in relationship development...

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