From the June 2009 Issue

The effects of technology on tax and accounting practitioners have been nothing short of astounding. While technology has quite obviously reshaped many aspects of everyday life for most Americans, accounting professionals with more than a couple of decades of experience have had front row seats to a monumental transformation of their profession. And, albeit grudgingly at times, the vast majority of professionals has learned to embrace these changes as beneficial to their practices and their clients.

This hasn't always been the case, however. Again, as most professionals with more than a couple of decades' worth of experience will attest, the technological movement has been a rough road, especially in the early years when many feared the disruption of change. Fortunately, a handful of tech-savvy accounting tech pioneers helped enlighten others and guide the profession into the more technology-embracing profession of today. One of those leaders is Richard Oppenheim, CPA.CITP.

If his name is familiar to many of you, it's for good reason. The veteran CPA has been one of the most vocal technology thoughtleaders in the accounting profession for more than 40 years. In addition to the occasional feature he writes for *The CPA Technology Advisor*, Richard's insights have appeared in numerous other publications. He has also been a featured speaker at countless conferences and association meetings, and was one of the organizers of the original AICPA technology conferences. But there's a lot more to Rich that more people should know.

As founder and principal of the Denver-based Oppenheim Group

use of smartphones for accessing client data and other work products remotely.

Professional Snapshot		
Richard Oppenheim, **CPA**.CITP **The Oppenheim Group** www.OppenheimGroup.com Highlands Ranch, CO **Blog:** richinsight.typepad.com **Twitter:** @richinsight **Productivity** **Score: 402**		

"One of the biggest challenges with clients is working with them to determine the real workflow issues they are experiencing, and then helping them find a real solution, not just a stop-gap measure," according to Richard. "There are many technological areas that can hinder a business, from management functions and oversight, to more day-to-day tactical issues." He noted that it's a very hands-on process and while remote collaboration can assist in some ways, it is still best to be able to visit with clients at their offices to accurately assess their needs. "Seeing helps believing what needs to be accomplished."

To achieve both the success of his consultancy and to help his clients achieve success in their endeavors, Richard relies on productivity-enhancing technologies, including multi-screen monitors and virtual collaboration with colleagues around the country who help give the Oppenheim Group a rounded base of knowledge and experience. The firm scored a 402 on *The CPA Technology Advisor's*

Productivity Survey (www.CPATechAdvisor.com/productivity),

"The Audit of a Brokerage Firm Using Automatic Data Processing."
After graduation, Richard worked at Peat, Marwick and Mitchell, the predecessor to today's KPMG. He then joined his father's practice, Spicer & Oppenheim, and stayed with the international accountancy firm until 1990, when portions of it were acquired by Grant Thornton.

While serving at both firms, Richard oversaw most technology issues, and recognized
early on the significance of the move from mainframe computing to minicomputers to microcomputer workstations (which were termed personal computers by IBM). In 1969, Richard was introduced to the AICPA's initial technology committee by its first chairman, Arnold Schneidman, which enabled him to play a major role in introducing personal computers to the conference agenda in the late 1970s and 1980s, when he would also help create the first microcomputer conference for CPAs. That conference would eventually evolve into today's AICPA TECH+. Richard served as conference chairman in 1985.

That same year, he served on a panel at one of technology guru Esther Dyson's conferences along with Bill Gates and Steve Jobs. Alas, he notes that he lacked a mentor to help guide him into a similar destiny as these two luminaries.

In the 1980s, Richard was an adjunct professor at New York University Graduate School of Business. When he left the public accounting firm in 1990, he started the Oppenheim Group to provide business consulting and then moved to Denver in 1994, where he also assisted CPE developer Micromash with its course development,
program testing, and educational sales and marketing.

As with many technology-infused modern professionals, Richard's personal life is largely intermingled with his work life (so long as we're not

co-mingling accounts). His practice allows him considerable flexibility to share

with prospective employers. In the current economy, the three year-old Job Connects program has been very popular, extending outside the church's congregation into the community. Other area churches have also sought Richard's assistance in setting up their own similar programs.

"I think the most important reason for the success of Job Connects is that it gives people the chance to meet each other in face-to-face contact so that all manner of communication is possible," according to Richard. "Traditional job fairs can be terrible events for attendees, with overcrowded meeting areas and many of the employers simply redirecting job seekers to their website. Our events let people interact in a more meaningful way." Job Connects also offers resume guidance and professional coaching.

As a sign of Richard's continuing embrace of technology, he is an active blogger, Facebook and Twitter user, and still makes the annual trek to CES in Las Vegas, where he and other editorial contributors to The CPA Technology Advisor regularly meet.

For younger professionals, Richard strongly recommends finding a suitable mentor, and offers this sage advice: "When you brush up against potential destiny, or if it brushes up against you, be open to what's going on in the world around you as its happening. Be ready to ask questions, learn and absorb the possibilities that can arise from investigation, conversation and thinking." See Richard's article in our October 2008 issue for more of his thoughts: "Presenting the 2008 40 Under 40: 10 Tested Truths for Tomorrow's Trailblazers" (www.CPATechAdvisor.com/go/2121).

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