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**8399**

Jason Blumer knows that some people think he's a little different than the typical accountant, or at least the stereotype of an almost middle-aged one. Those "some people" include the tax manager at his practice, his staff and some of his clients... even his wife.

Maybe it's the crazy eye glasses. Perhaps the jeans and flip-flops he wears to work. Or maybe it's that he's almost as likely to be sitting in a local coffee shop with his Apple MacBook Pro laptop, than in his office. You can probably throw a few of the other patrons and staff there into the mix. He wouldn't have it any other way.

“I’m just not a guy who wants to wear a suit and tie all day.” Considering his notable

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But in 1997, both decided to study for and take the CPA exam together. Jason also went on to receive the CFE credential, designating him as a Certified Fraud Examiner.

So after receiving their CPA credentials, dad went on his way and bought out a small existing practice, and Jason worked for a couple of accounting firms for the next several years. By 2003, though, Jason had joined his father’s firm and helped it achieve rapid growth, implementing dramatic technology and workflow changes. Key among these was adoption of web-based or ASP-hosted professional solutions and trying to get his clients to do the same. He was one of the early professionals to see the promise of cloud computing for the profession, seeing that it would allow the practice to be more agile, work from anywhere and serve clients anywhere in the world.

This wasn’t just empty dreams, either. By 2009, when his father retired, the practice had grown to include clients across the country, including Washington, New York, Michigan, Texas and even Japan. The firm specializes in individual and corporate tax, fraud and forensic accounting, virtual bookkeeping services and strategic consulting, and has a strong client base that includes medical and dental practices, plus creative companies such as web developers, marketing firms and even an illustration house.

Since his practice and most clients use almost exclusively cloud-based accounting programs, he is able to collaborate with them, have video meetings or even access their files, no matter where they are and no matter where he is, whether it’s in the office, at home or sitting at his favorite table at the coffee shop in downtown Greenville.

In addition to turning the practice into a “virtual firm,” Jason was also an early adopter of paperless workflow practices and remote access capabilities for all of his

staff, both of which fit perfectly into his cloud-based goals. All of the firm's desktops

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space. A special eBook featuring this year's honorees is available at [www.cpata.com/40under40/2010ebook](http://www.cpata.com/40under40/2010ebook).

Jason's focus wasn't only on implementing new technologies for client work and practice management, however. He has also taken very proactive steps in marketing the firm, turning almost exclusively to social media such as Twitter, Facebook and LinkedIn. He directly attributes his out-of-state client wins to these networking tools and to followers who repost articles from his blog, [www.blumercpas.com/blog](http://www.blumercpas.com/blog). The firm's website and blog were created by client Head Lamp Creative ([www.headlampcreative.com](http://www.headlampcreative.com)).

"We often get referrals from business owners who've seen our tweets and other postings, or who've seen other users mentioning and forwarding on our tweets and links to our blog," Jason says. "They are often in creative industries or are companies with younger management, because these are more likely to adopt a virtual accountant-client relationship. We both know that we will probably never meet each other in person, but since we are both relying on cloud-based systems, we can still collaborate and be even more productive."

He and his virtual clients do get to "see" each other, however, through periodic Skype video calls and through webinars. "For many businesses, this is not just an accepted practice, but actually the new normal."

For other clients who may be skeptical of web-based systems, he is happy to play the role of educator. "We still have legacy clients who are on installed accounting systems, so we're also focused on internal marketing of these benefits. Our staff members are true believers, and when a firm achieves that level of adoption it makes selling the concept to clients much more achievable," notes Jason, who is certainly the head true believer.

“When a client or prospect learns that we can perform all of their internal day-to-

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Collaboration.” Professionals can sign up for free at [www.thriveal.com](http://www.thriveal.com). This site was created by another web development client, Squared Eye ([www.squaredeye.com](http://www.squaredeye.com)). And if his firm and the CPA network weren't enough, he also co-owns Atkins Media Group ([www.atkinsmedia.net](http://www.atkinsmedia.net)), a creative/graphic design firm.

While he is certainly successful with his practice and other business and educational activities, Jason isn't all work. His strategic use of technology allows him to be more mobile and, therefore, spend more time with his family. His wife Jennifer, who has a degree in early childhood education, homeschools their three daughters, ages 12, 10 and 5, with Jason helping out in the areas of math and science. The family enjoys afternoons in local parks and trips into the mountains. Jason enjoys working out, running and weightlifting. The family is active with North Hills Community Church where Jason is a Deacon and involved with the finance committee.

So if you happen to be passing through Greenville, South Carolina, and have time for a cup of coffee, you know where to look first. There's a good chance Jason will be sitting at the back bench in the Red Room of Coffee Underground ([www.coffeeunderground.biz](http://www.coffeeunderground.biz)), working with client files on his laptop or chatting with people on Twitter and Facebook. In the 21<sup>st</sup> Century, that counts as work when you're the boss.

## **Infobox**

**Jason M. Blumer, CPA, CFE**

Chief Innovation Officer, Blumer & Associates, CPAs, PC

**Greenville, SC**

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**Must-Have Technology:** MacBook Pro laptop & iPhone4

**Favorite App:** Angry Birds

**Favorite Section on [www.CPATechAdvisor.com](http://www.CPATechAdvisor.com):**

Podcasts ([www.CPATechAdvisor.com/intersection](http://www.CPATechAdvisor.com/intersection))

**Memorable Recent Book:** "A Whole New Mind: Why Right-Brainers Will Rule the Future. (See <http://bit.ly/c960Pt> for Jason's review of the book.)

Technology

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