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Isaac M. O'Bannon • Jun. 28, 2012

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From the July 2012 Issue.

How much has the profession changed in the last 16 years? Teresa Mackintosh has had one of the most unique front row seats during this time, serving in public practice as a CPA, as well as in various leadership roles with two of the largest technology companies serving tax and accounting professionals.

Over the past decade, much has been said about the nearly generation-wide gap that resulted from several educational trends, including changes in credit hour requirements for the CPA credential during the early 1990s.

The accounting profession has more than rebounded since, and has returned to one

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flexibility and willingness to adapt to changes that may be driven by competitive needs, the expectations of younger professional staff, and even the needs of a new generation of younger and more mobile business clients.

Over the past eight years, our annual "40 Under 40" program has sought to recognize those in professional practice and at technology vendors who are emerging as the next generation of trail blazers for the profession. One of the most notable alumna of this program is Teresa Mackintosh, a CPA who has been honored with that recognition since the program's inception.

In April of this year, Mackintosh joined CCH, a Wolters Kluwer business, as the Executive Vice President and General Manager of Tax, the largest business unit for CCH, and a position recently created to oversee all aspects of the technology vendor's tax-related offerings to public practitioners. Mackintosh's new position is focused on giving firms the resources to advance their business overall, by helping them with internal processes, client collaboration, tax cycle issues and other factors.

Mackintosh served for 16 years at Thomson before that, which became Thomson Reuters in 2008, moving through progressively senior roles in various areas of the organization, including product management, strategic marketing and product development, ultimately becoming general manager and senior vice president of Thomson Reuters' Indirect, Property and Trust Tax division, working from the company's Carrollton, Texas, office. She also spent three years as a tax consultant with PriceWaterhouse after earning the CPA credential in 1996.

"I've been fortunate to have had the opportunity to work with many practice areas and learn from a lot of people," Mackintosh said of her experience with Thomson Reuters. She specifically cites Jack LaRue as a key mentor and valued colleague whom she worked for and alongside in various capacities over the years. LaRue, is currently the general manager of one of the Thomson Reuters' professional payroll systems.

“Jack’s real purpose and drive is to be a professor of marketing. He cares deeply about

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practices,” she said. “There’s a sense of validation from helping tax and accounting professionals, because it’s personal to them, it’s about helping them succeed and build for success. For me, it’s a much more collegial and family-like environment.”

As Mackintosh is among the new generation of leaders emerging within technology vendors that serve the profession, she is also keenly aware of the challenges faced by firms undergoing their own changes.

“The ‘graying’ of the profession and changes in leadership roles and styles is taking place in firms of all sizes. At the same time, many firms are also are trying to manage changing expectations from their clients, a ‘graying’ of their client base, who in many cases are also being led by a new group of younger and more tech-inclined entrepreneurs,” Mackintosh noted.

“There is a direct parallel between the two sides. Just as CCH understands the need to continually innovate around the application of new technology and changing expectations from professionals, firm partners and management need to adapt to ensure that they are engaging these younger business leaders.”

One of the key desires of younger professionals is mobility and remote access options that allow them to have a work-life balance that, while attaining the same level of productivity for the firm, doesn’t require being in a physical office for 40 to 60 or more hours per week.

“The newer generations of professionals don’t expect to work less, they simply want to be able to do some of their work from places that may be more convenient to other aspects of their lives.” Mackintosh shares this desire for work-life balance, and the technologies used by CCH allow her to work remotely or from the CCH’s Irving, Texas office, while managing workflow among staff located in Wichita, Kansas, Torrance, California, and Riverwoods, Illinois. This flexibility gives her more time with her

family, including husband Craig and children Avery and Brooks, to maintain a more

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As for what CCH is working on next, Mackintosh is excited about the Open Integration Platform (OIP), which will give customers and third party developers the ability to integrate other applications with CCH's cloud-based solutions.

“We're thinking about how we can serve professional firms better in terms of a larger ecosystem of technology. While large firms may have the tech resources to build apps on top of a platform that is specific to their needs, OIP will bring this capability to smaller sized firms, enabling them to tailor systems and apps to their workflow and help them be more productive.”

“CCH's developments with OIP, as well as other cloud and mobile initiatives, show that our number one goal is to help professionals be more effective and responsive to their clients, helping them have the right tools to service their clients' needs today and tomorrow.”

The position Mackintosh is filling was created last year when CCH reorganized its tax and accounting divisions. “We decided to sharpen our focus on process driven areas such as tax and audit, to better understand and serve our customers in small, mid-sized and large practices,” said CCH President and CEO Mike Sabbatis.

“We wanted leaders for these groups who had broad experience in development and product management, and Teresa was a perfect fit, being a CPA, having worked in all areas of taxation and firm technologies and successfully managing a business group. She is an excellent executive with a proven track record and fits the goals I have for the direction of CCH.”

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