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- Current Chair of Board of Directors
- Technology Committee
- Past Chair and cofounder of the New/Young Professional Network
- Tomorrow's CPA Speaker
- Instructor
- AICPA
- AICPA Council
- Information Technology Executive Committee for 2009-2011
- CPA Ambassador
- Virtual Grass Roots Committee
- Conference Speaker
- Boomer Knowledge Network – Contributor

Hobbies: Watching Daughters Lacrosse, Theater, and other activities, an occasional round of Golf, Photography

What are the key areas of your firm that have seen the greatest change in workflow over the past few years? Are you using automated workflow tools?

There is no doubt that as we have grown both in staff and clients the need for good workflow is critical. Workflow ensure efficiencies and consistency in our ability to support our clients. We have evaluated a few automated workflow systems but have yet to find a good fit for our type of business. We are continuing the search....

Have you embraced cloud computing for your practice? Are you moving your clients to the cloud? Embraced would be putting it lightly. Simplified Innovations is a Cloud Computing company which enables our clients (CPA Firms) to move their entire firm into the cloud. We are passionate about the opportunities CPA's have available to them by moving to the cloud and are excited every day to help our clients leverage those opportunities.

On a broader scale, how do you see new technologies changing the accounting

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impacted your productivity and work-life balance? As a cloud based company I am 100% mobile. The availability of mobile devices, apps, internet, etc has given me the ability to be extremely productive from anywhere I am. It's impact on work-life balance is a double edge sword. While the flexibility of being mobile doesn't restrict me to the office to get my work done, the accessibility of work from anywhere means work can easily bleed into the life part of the equation.

Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking? Definitely success in a variety of ways. First, I have built a network of people I trust that I likely would never have met otherwise nor been able to stay as close in touch with. Additionally, social media allows us to build awareness of our solution as well as keep a connection with our clients.

What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses? I think it is very easy for people to get overwhelmed by feeling the need to be everywhere right away, LinkedIn, FaceBook, Twitter, Pintrest, FourSquare, etc etc. The key is to choose an application that you are comfortable with and build from there. In addition, I think people feel the need to be too salesy with Social Media. People seek refuge from the volume of SPAM and other sales messaging in our worlds. Just participate and build your brand and the value will be there.

What single piece of technology do you find the most important in your professional life?

The reigning champion and title holder is the Internet! Without access to the internet just about any device I can put my hands on for work is useless.

Not including your current employer, what company do you most admire and why?

Under Armour is one of my favorite companies right now. They have evolved into so

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Do you use a tablet for work purposes? I have retired my iPad2 for my Windows 8 Lenovo Yoga. Laptop and Tablet in 1

What is your favorite accounting mobile app, and why? If I have to limit it to accounting I've got to say, my Online Banking App.

How many monitors do you have on your desktop workstation? 3, one being a mobile monitor so it travels with me.

Read more about this year's [40 Under 40 Honorees](#).

Technology

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