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**Seattle, WA**

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**Education:** Seattle University Bachelor of Arts in Business Administration with emphases in Accounting and E-Commerce Information Systems

**Professional Associations/Memberships:** WSCPA, AICPA, President-Elect Seattle University Alumni Board of Governors

**Hobbies:** marathons, triathlons, live music, building our business

**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?** We are using an internally developed workflow tool. While automation within workflow tools seems to have improved in recent years, our process relative to the industry is unique both with respect to billing and with the recurring nature of our service offerings. As such, we found that the off-the-shelf tools were not customizable enough to our needs without substantial work and therefore we developed an internal solution.

**Have you embraced cloud computing for your practice? Are you moving your clients to the cloud?** For the last 3 years, we've hosted client's QuickBooks files on the cloud, used Dropbox and maintained a client portal with ShareFile. In the last year, we've seen an increase in clients who prefer cloud accounting solutions such as

FreshBooks. Internally, however, we've pulled back a bit on our cloud-based

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on the tax preparation side as tools such as ProSystems Scan continue to improve.

**How mobile are you regarding your work? How have mobile devices and apps impacted your productivity and work-life balance?** Our IT framework allows us to go 100% virtual. Our team can work from any location with Internet access and have a relatively seamless experience. We use mobile devices to access documents on the fly, capture data such as receipts or notes and communicate with clients. We have not experienced a material improvement with respect to work-life balance – in fact, arguably mobile devices have been a detriment to work-life balance as it allows you to be accessible from anywhere/anytime.

**Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking?** Yes. Yelp is the single biggest driver of tracker from a business development perspective. We make a concerted effort to monitor our page and direct prospects to it as means of validating our reputation in the community. We also leverage Facebook, Google+, Twitter and LinkedIn.

**What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses?** Our tips for social media are as follows:

- Be consistent both with the nature and frequency of your messages;
- Don't try to direct sell;
- Use social media to generate face-to-face interactions; and,
- Separate business and personal.

**What single piece of technology do you find the most important in your professional life?** Dropbox is a critical component of our accounting process as it creates a seamless way to share documents with clients near real-time and allows us to access documents on the fly.

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

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consistency with which they do this is almost unmatched.

**What brand/model mobile phone do you use?** Nokia Lumia 920 – Windows Phone 8

**Do you use a tablet for work purposes?** No

**What is your favorite accounting mobile app, and why?** I think it's a tie for first between Dropbox and FreshBooks. I really enjoy Dropbox for the ability to quickly share documents with clients and access them on the fly. And, I find that FreshBooks is a great tool for many of our clients to streamline their invoicing process.

**How many monitors do you have on your desktop workstation?** Two

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

Technology

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