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**Have you embraced cloud computing for your practice? Are you moving your clients to the cloud?** Absolutely; I use Software as a Service (SaaS) for the CS Professional Suite for all of my tax and accounting solutions and provide all of my clients with NetClient CS Portals. I am lucky to work with clients who tend to be universally receptive of cloud technology.

**On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)?** The profession has long benefited from a tax code which has been so complex that it absolutely required the involvement of a tax professional to generate a correct tax return in the presence of any level of complexity. Technology is rapidly closing this complexity gap between the tax law and the taxpayer. As a result professionals will have to look towards technology themselves for a more efficient workflow, not only to keep up with the resulting cost pressures, but to free up time to differentiate the proactive advisory and consulting services professionals can offer from reactive off-the-shelf solutions. Basically, we should see a continuation of some of the same technology themes (paperless, process efficiency, cloud, etc.) from the past decade or so, but with a renewed urgency as the complexity gap narrows at a faster rate.

**How mobile are you regarding your work? How have mobile devices and apps impacted your productivity and work-life balance?** I consider myself to be extremely mobile, both in my work for Thomson Reuters as well as my work as a tax preparer. I travel with what I refer to my "office in a backpack", which contains my laptop, a mobile Toshiba LCD USB monitor, a Canon P-150 mobile document scanner, and a variety of other tools which allow me to bring my production environment on the go with me, whether I'm preparing returns or performing my Product Management duties out on the road. The NetClient CS Mobile app has also proven popular among my clients due to the ease of access to their information, and

other than Mobile CS for access to my clients' information on the go, I have found

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nor seeking a staff, this does not apply to my practice), it is less valuable as a tax client acquisition tool, particularly if looking for more than W-2-only customers. However, it has proven invaluable in solidifying me and others as lifelong thought leaders and advisors to our clients, by keeping them aware of compliance changes and possible strategic planning opportunities. A good social media strategy, then, is one which drives referrals from your existing client base (in marketing terms, by increasing your Net Promoter Score) through the free dissemination of valuable information.

**What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses?** Video, video, video. Research is showing rather conclusively that video is more likely to both be watched by decision makers as well as influence them; particularly as compared to a multi-page written treatise that the average client or prospective client will not comprehend (nor take the time to read in the first place – “TL;DR”). I also recommend that practitioners host their videos on YouTube and embed them on their sites and social media pages; given that the YouTube search is now the second most-used search engine on the internet, it provides a great opportunity for dual exposure for video content. Plus, video serves as an ideal medium for a client FAQ on any practitioner's website.

**What single piece of technology do you find the most important in your professional life?** Although probably a boring, clichéd response I have to go with my laptop – for me, it facilitates everything from note-taking, to tax preparation, to video production, to whitepaper authoring, to amusement on long flights, and much, much more.

**Not including your current employer, what company do you most admire and why?** Virgin and all of its various subsidiaries; I really like Virgin's CEO, Richard Branson, and his intense focus on customer satisfaction, as well as the company's

playfully irreverent marketing and pricing for the masses on quality products and

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Because it's a simple, easy to use 10-key calculator with a virtual tape.

**How many monitors do you have on your desktop workstation?** I have dual monitors both at my desk in the office at Thomson Reuters as well as in my home office, but I frequently hook up my Toshiba mobile monitor as a third monitor dedicated to Outlook.

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

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