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**Education:** Master of Taxation, University of Texas at San Antonio Bachelor of Commerce and Business Administration, University of Alabama

**Professional Associations/Memberships:** AICPA, Texas Society of CPAs, NASE

**Hobbies:** Running, Travel, Wine, Food, Relationships

**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?**

Several years ago, we used automated document management software that interfaced with our tax software. The particular product we were using at the time did not meet our efficiency standards. We used the software for a couple of years and returned to manual input for this reason. I believe software technologies have improved over the last 5 years; therefore we are upgrading our tax software in order to utilize document management products that interface automatically with the tax software. This automation will increase our efficiency and productivity during the hectic 2014 tax season. The lower level data input will be processed by support staff.

**Have you embraced cloud computing for your practice? Are you moving your clients to the cloud?** We use a variety of products that are based in the cloud. Our payroll service is a cloud based product. A few of our clients use portals to post the payroll information directly to the software application. During the fall, we will begin using secure client portals to send tax information directly to our clients. They

in turn will have the ability to upload documents straight to our cloud server. Not all

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regarding your work? How have mobile devices and apps impacted your productivity and work-life balance? I have the ability to work from anywhere as long as I have my laptop or iPad with as well as a good internet connection. BUT I generally work in my office or at a client's office. There is a certain amount of my work that requires structure as far as my approach to the task. Where I decide to sit and engage that structure is completely flexible.

**Have you found business success via social media, either via recognizable ROI, new customers, marketing or networking?** So far, no. Most of the marketing which has given us business success is word of mouth or direct communication with potential clients.

**What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses?** Many individuals miss proofreading their work before hitting the send button. The first impression is not the handshake in this case, it is the composition of the written communication.

**What single piece of technology do you find the most important in your professional life?** iPad – I like the constant connection I can have with the iPad. Instant Messaging, Face Time, Email, Document creation, Document review, Book reading etc. no matter where I am in the world.

**Not including your current employer, what company do you most admire and why?** I admire companies that stay ahead of the curve reinventing themselves. A few that come to mind are – McDonald's, Rackspace, Costco, Target, Whole Foods

**What brand/model mobile phone do you use?** iPhone

**Do you use a tablet for work purposes?** Yes, I use my iPad primarily to keep current with email. It's also a handy tool for meetings with clients. You can take notes,

conduct email and internet research, and look-up pertinent documents.

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