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seen as professional hermits, because of the nature of many of the traditional services they provided.

Sep. 05, 2014



Accountants have long had a reputation as being somewhat reclusive, perhaps even

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For Adrian Simmons, a CPA in Laurel, Maryland, this is counterintuitive to the way he wants to run his practice. "People and relationships are the most important part of our business," he said. "And even though technology helps us improve our work product, we shouldn't let it allow us to become complacent in the human elements of our business."

Despite his boyish looks, the 32 year-old has been credentialed for nearly 10 years, including working for a Big 4 firm in Baltimore. For the past nine years, Adrian has worked with his father at the practice his father started more than 30 years ago. The firm, David G. Simmons, CPA (www.simmons-cpa.com), is currently focused mostly on individual taxation and planning, wealth advisory services, investment management, and small business consulting.

Since joining his father's practice, which he will likely take over in a few years, Adrian has assumed supervision of most of the technologies used in the practice and has moved them toward greater productivity internally, as well as helping their business clients better manage their business processes. The firm has adopted a more efficient paperless management system and is now using remote access, project management and online scheduling tools. The firm is also guiding clients toward web-based payroll and accounting systems, as well as online collaboration tools.

"My goal isn't to find a way to do more, but to do better," Adrian says of his technology and business focus for the practice. "I am always keeping an eye on what our clients want, what our most compelling value proposition can be. To do this, we don't need to be on the 'bleeding edge' of technology, since that can lead to errors. But we certainly stay in the early adopter range."

The firm, which Adrian is planning to rebrand in the near future, scored a 279 on the *CPA Practice Advisor's* Productivity Survey, a free web-based tool (www.CPAPracticeAdvisor.com/productivity-survey) that helps firms assess their

workflow and technology usage, and provides benchmarking against similarly sized

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As a young professional, Adrian is also an avid user of various social media, and has turned to these and other technologies to keep the human interaction component of client relationships strong. In addition to Twitter, he also blogs frequently on small business and accounting topics, and manages a YouTube channel that includes videos with advice and tips for small businesses and individuals. (You can see the videos at www.youtube.com/SimmonsCPAFirm). He's even recorded a video commercial for the firm. He sees these tools as technology offering a human touch that otherwise can get lost during purely electronic engagements.

"We don't want to be just a faceless 'mail-away' service that a business sends files to and gets them fixed. We want to be the people they trust for advice when it comes to their financial and business management needs. And to get this level of trust, most people want to meet you and see you, whether in person with a handshake or a video call."

As the uber-connected technophile that Adrian is, he's never really "away" from work, since he has access to most of his work programs and data from anywhere using LogMeIn remote access on his iPad or laptop. This makes it easier to get out and actually have these face-to-face meetings with clients and see how they are using their bookkeeping and other systems in their businesses.

While his interest in technology has been largely self-inspired and self-taught, his business savvy is most certainly a family trait, since not only is he following in the footsteps of his father, but one of his brothers is also a CPA, although in the government sector. Adrian graduated with a degree in business administration from Loyola in 1999, and then completing an MBA in 2000.

His adaptation of various mobile tools also allows him to get out of the office more often for recreation, including ski trips to Vermont and Pennsylvania, as well as scuba diving with friends in Florida. While most of his recreational dives are less

than 60 feet, he has had the opportunity to go as deep as 90 to 100 feet with some

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in the modern age, it's refreshing that at least one young tax and accounting professional is focused on bringing it back.

Infobox

Adrian G. Simmons, CPA – Manager

Firm: David G. Simmons, CPA

www.simmons-cpa.com

Laurel, MD

Productivity Score: 279

Practice Specialties: Individual & Business Taxation; Wealth Advisory, Technology Consulting

Education: BBA, Loyola; MBA, Loyola

Professional Associations: AICPA, Maryland Society of Accountants Scholarship Foundation Trustee; MSA Technology Committee; Columnist for MSA Newsletter

Most Recent Conference: AICPA PS TECH+, Las Vegas

Social Networking:

A full list at www.AdrianGSimmons.com.

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