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President & CEO, SurePrep

Newport Beach, CA

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**What ONE piece of technology could you absolutely not live without?** Although I'm tempted to say my iPhone since this is what keeps me connected while I'm on the road, I think the laptop still wins at being the single most important piece of technology. It would be easier for me to get my work done with a laptop and no iPhone than the other way around (e.g., responding to this questionnaire would be painfully time consuming if done using the iPhone).

**How many hours of the day are you plugged in and responsive to client needs? And what tools/products make it possible for you to have flexibility?** SurePrep provides several levels of support that allow clients to get their needs addressed in a timely manner. Should a client issue get escalated to me, I am reachable virtually anytime, anywhere. To stay connected, I use a laptop (e-mail & chat) and iPhone (e-mail, chat & voice).

**What are some ways your firm/business has gone "paperless" and/or "green" in the last two years?** SurePrep runs a paperless office. All client work is performed on-screen, and all documents (e.g., contracts, invoices, etc.) are scanned and stored online. In an office with over 200 seats, SurePrep has only a single, infrequently used printer.

**NOT including your current employer, what company do you most admire and why?** I admire Apple for its ability to rapidly come out with extremely innovative new products even though it's a large company.

**Do you embrace cloud computing?** SurePrep has been a big user of cloud computing for several years. During tax season, we need dozens of additional PCs and servers,

which we get in the cloud. It has allowed us to reduce costs, scale up or down more

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**Do you foresee the majority of firms still implementing servers for the majority of their computing in their offices five years from now or do you think they will be outsourcing this component to vendors who specialize in this area?** Five years from now, I expect most server-based computing will be done in the clouds rather than on premise.

**Are you using social networking (such as Twitter, LinkedIn, Plaxo, Facebook) as a marketing tool for your practice/business ... or do you use such sites for personal use only? Have you gained any clients or seen other demonstrable benefits from the use of social networking?** Yes, SurePrep uses Facebook, LinkedIn and Twitter profiles to promote our products and services.

**Do you subscribe to a magazine and/or local newspaper?** I subscribe to *The Wall Street Journal* to better understand what is happening in the U.S. economy and the *Economist* magazine to better understand the political issues in the United States and around the world.

**Do you use online resources like webcasts for CPE training?** Yes, we use webcasts for training purposes frequently.

**How many monitors do you have on your desk?** Two.

**What operating system and version of Microsoft Office is installed on your work computer?** Windows 7, Office 2007 (2010 upgrade will come soon).

**What is an "old school" business practice or process you'd like to see changed in the next five years and why?** I would like to see accounting firms adopt a paperless workflow including front-end scanning. In addition, I'd like to see accounting firms become more open to business processes that many other industries use to improve productivity including outsourcing. SurePrep provides solutions in both these areas

(i.e., paperless tax workflow and outsourcing) that enable firms to become more

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