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## TECHNOLOGY

# 40 Under 40 Honoree: Susan Roberts, CPA, MST – 37

Sr. Tax Manager, Sanford, Baumeister & Frazier, PC, Ft. Worth, TX

Aug. 29, 2006

**Education** – MS Taxation, Baylor; BBA, Baylor

**Family** – Husband Jay; daughter Molly 7; son George 4.

**Hobbies & Interests** – Spending time with her “incredible husband and children,” travel, scuba diving and enjoying the beach & pool.

**Professional Affiliations** – AICPA; TSCPA; Ft. Worth Chapter of CPAs (Board of Directors and Membership Committee Chair); and national speaker for Continuing Education companies.

### **What peers, clients and friends say about Susan:**

Susan is a multidimensional professional and an emerging leader in the profession. She is bright, very energetic and driven, which has led to her success as senior tax manager in a busy, successful local firm, as well as a star lecturer for Thomson/PPC on taxation topics. For her speaking roles, she has worked actively in the development of interactive financial planning tools for public practitioners and clients. Susan is in her second year as highly successful chair of the Fort Worth CPA membership committee, and she was also recently elected to the board of directors of that organization. On weekends, you might spot her on her Harley.

## **What technology or business process does Susan see affecting the tax and accounting profession in the next five years?**

“There will be a continued move toward a paperless office, thereby enabling employees to work from remote locations more prolifically, and decreasing necessary storage space for paper files. Also, portals/virtual lockboxes will become more popular on the web, which will allow clients to store confidential data and give clients the power to allow professionals to view documents such as wills, trust agreements, partnership agreements, tax returns, etc. Last, due to the increased remote office access by employees, virtual firms will be on the rise.”

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