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## TECHNOLOGY

# Association Updates

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## CITP... Bridging The Gap

Technology is an integral part of today's complex business environment, and organizations often struggle to find individuals who possess both the business insight and the technology expertise needed to assess and implement cost-effective solutions. While IT professionals have the technical expertise necessary to ensure that technology solutions are properly installed and configured, they lack the CPA's perspective and ability to understand the complicated business implications associated with the deployment of new technology. The Certified Information Technology Professional (CITP) credential offered by the American Institute of Certified Public Accountants enables CPAs to demonstrate their ability to bridge the gap between business and technology. The following case study illustrates how one company benefited by selecting a CPA.CITP to assess, recommend and oversee their implementation.

## Background

Judy Alexander is the President and CEO of Emmaus Homes, a provider of residential, rehabilitative and recreational programs to more than 350 men and women with developmental disabilities in St. Louis and Eastern Missouri. Emmaus recently underwent a significant technological upgrade. Jeffrey F. Ward, CPA.CITP, CISA is a Partner and the Director of Assurance Services at Stone Carlie & Company,

LLC. Ward was hired to provide needs analysis, software selection and project management services to Emmaus Homes.

## **The Engagement**

Emmaus needed a paperless solution to streamline operations, force consistency between campuses and allow anytime/anywhere access to information via the Internet.

Alexander was determined to find an experienced consultant with project management skills, experience working with mental health organizations, and a strong IT background to aid in the selection and implementation of the new solution. “As a not-for-profit organization, we had limited internal experience with a project of this scope,” says Alexander. After an exhaustive six-month search, she began to doubt whether the person she was looking for really existed. “I truly thought I’d have to refine my expectations.”

Enter Jeff Ward, CPA.CITP of Stone Carlie & Company, LLC. Ward’s credentials provided evidence of his business acumen and a strong technology background, and Alexander’s experience with Stone Carlie reassured her that Ward would be able to provide knowledgeable and unbiased recommendations based solely on Emmaus’ unique business needs.

“Jeff was an active listener with my team, making sure he understood our needs,” says Alexander. “He then validated what he heard and assisted us in selecting the solution that best fit our environment. His technical skills were critical to ensuring that we did not select a solution that we could not afford over the long term or was too complex for my staff to use.”

## **Leveraging the CITP Credential**

“Possessing the CPA.CITP was very helpful in demonstrating to Emmaus that I had the skills and experience that was needed, and gave Alexander added comfort as she made her decision to seek our help,” says Ward. He achieved his CITP in 2000 in order to make his IT specialty clearly identifiable. With the CPA.CITP credential after his name, future clients learn Ward’s background immediately upon introduction.

Visit [www.aicpa.org/citp](http://www.aicpa.org/citp)

to find a CITP in your area, or to learn how you can become a CITP.

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## **NSA To Offer Crash Course & Exam For ABA**

Accountants looking to earn the Accredited Business Accountant (ABA) credential now have a way to jumpstart their study preparation and take the exam when they are most prepared to tackle it.

The National Society of Accountants (NSA) is offering the “ABA Crash Course and Exam” August 13-15, 2007, at the Portland Marriott Waterfront in Portland, Oregon, immediately preceding the NSA Annual Meeting.

The program includes a two-day cram course covering the five topics to be tested on the exam. Participants will have an opportunity to take a sample exam, receive tips and tools from expert facilitators, and build the body of knowledge needed to successfully pass the ABA exam. The ABA exam will be administered on the third day by the Accreditation Council for Accounting and Taxation (ACAT), the credentialing organization that offers the ABA credential. Though registrations will be accepted until July 31, 2007, NSA encourages anyone interested to register by May 1, 2007 to allow themselves sufficient preparation time.

### **NSA Past President Helps Reshape EA Exam**

The past president of the NSA, Wanda Samek, EA, ATA, recently participated as a member of a Subject Matter Expert Panel in a special workshop to review and update examination requirements for Enrolled Agents. The workshop was sponsored by the IRS, and the panel included a group of seven EAs and representatives from Thomson Prometric, a company hired to administer the Special Enrollment Examination.

Professionals holding an EA credential are “Enrolled to Practice Before the Internal Revenue Service” on matters that include representing clients in audits, appeals and other matters. The panel offered input on the IRS’s new exam format, analyzed questions and answers, determined a cut score, and helped ensure that those passing the exam are qualified to practice federal taxation.

“I was honored to be chosen to participate in this workshop on behalf of NSA,” said Samek, who is an EA and leads her own tax firm, Custom Business Service, in Denton, Texas. “NSA has thousands of Enrolled Agents in its membership who deal with multiple facets of federal tax law on a regular basis. It’s a complicated area, and fine-tuning this exam is one of the best

things we can do to make sure all Enrolled Agents are fully prepared to represent their clients.”

NSA offers a preparatory seminar for practitioners planning to take the exam, and it is available as a live course or as a self-study course. NSA also offers a variety of programs with which to meet the continuing education requirement. More information on the NSA is available at [www.nsacct.org](http://www.nsacct.org).

Technology • Article

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