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40 Under 40 Honoree: Joe Harpaz — 34

VP, Office of the President, Thomson Tax & Accounting, New York, NY

EDUCATION: BS, Computer & Electrical Engineering —
Carnegie Mellon University

FAMILY: Wife Pamela; Children Maya (3) Zachary (1)

HOBBIES & INTERESTS: Tennis, golf & poker

What's the one piece of technology that MOST helps you get through your normal workday?

"Wireless technology. Whether it's my BlackBerry, cell phone, laptop air card or my new iPhone, the ability to stay connected professionally with coworkers and personally with my family is great. It gives the benefit of staying connected with those whom you're not in front of and simultaneously frees you from your desk so that you can get face to face with people more often."

What will be the biggest change over the next five years in the ways tax and accounting firms operate?

"There will be increased emphasis on more automation of tasks as a result of resource shortages, price pressures, firm liability and commoditization of certain services. As more functions and services get automated, firms will be forced to differentiate themselves through the level of client service, advisory services and client involvement that extends beyond just getting a tax return done on behalf of the client."

What Joe's peers had to say about him:

With extensive business and leadership experience — from technology architecture and development to business development, sales and marketing — Joe is extremely well-rounded. He is both a jack of all trades and a master of all

trades. He is unique in that he has always had the rare intuition to recognize

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groups to identify key growth opportunities for the organization.

Prior to his current appointment, he served as vice president and general manager of Immediatech, the corporation he co-founded and that was acquired by Thomson Tax & Accounting in 2005. Joe was behind the design of the Immediatech

GoFileRoom solution, a premier web-hosted workflow and document management solution

for large CPA firms. Post acquisition, Joe continued to manage the GoFileRoom group and also oversaw the initial development and rollout of Thomson Tax & Accounting's InSource WorkFlow Manager, an automated workflow solution for corporate tax departments.

In addition, he also co-founded a systems integration business that specialized in workflow technology solutions for financial services companies, including banks, brokerage firms and insurance companies. Prior to starting his own business, Joe worked for Goldman Sachs in New York City where he was involved in the development and support of firm-wide compliance systems.

Joe is an exceptional manager who builds incredible loyalty from those who work for him. He is the type of manager who allows his reports to have control and ownership, while providing them with guidance and vision. He is a true leader who provides thought leadership and strategic vision. A social and interpersonal person by nature, Joe is an exceptional public speaker and an enjoyable person to work with or be managed by.

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