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TECHNOLOGY

40 Under 40 Honoree: Nancy Lee, MBA, BBA — 36

ProAdvisor Program Manager, Intuit, Inc., Mountain View, CA

Aug. 29, 2007

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ProAdvisor Program Manager, Intuit, Inc., Mountain View, CA

EDUCATION: MBA — UC Berkeley

FAMILY: Happily taken with a boyfriend of many years.

HOBBIES & INTERESTS: traveling (has visited more than 30 countries and has lived in Nigeria, Singapore and Turkey), sports (especially tennis & golf), gardening

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

“Boring as it may sound, I would be completely inoperative without Outlook, both in terms of communicating with my customers and teammates, as well as managing my calendar and the tasks that I need to get done.”

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

“In the next five years, I think a couple of things will continue to pick up momentum:

– **Shift to a paperless society.** We are increasingly living in an electronic world — tax prep forms are being prepared online, accounting software is replacing paper and pen.

– **More and more remote work is being done.** After the initial relationship is established, more and more interactions between accounting professionals and clients will be conducted remotely, both for convenience and cost.”

What Nancy’s peers had to say about her:

Nancy is an exceptionally bright and capable young leader who continually strives to understand the needs of accounting professionals so that she and Intuit can provide better solutions. As the leader of the team that manages the QuickBooks ProAdvisor Program for Intuit, which has more than 40,000 members, she reaches out to these professionals and visits them in their offices, showing true dedication to accountants and their small business clients. Her team also manages alliances with the Small Business Development Centers across the country to deliver training that helps small businesses succeed.

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