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Aug. 29, 2007

40 Under 40 Honoree: Sonya O'Connor, EA — 31

Partner, Applied Financial Planning, Inc., Laguna Hills, CA

EDUCATION: BS Criminal Justice

FAMILY: Boyfriend; Puppy Leonitus (6 months)

HOBBIES & INTERESTS: High Tea with friends; riding quads with her boyfriend; camping with family & friends; swimming, reading & playing World of Warcraft. She is definitely an RPG gamer and spends many hours online with friends vanquishing monsters and gathering loot.

PROFESSIONAL AFFILIATIONS: California Society of Enrolled Agents

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

"Internet with use of computer — 98 percent of my daily activities are run through the Internet. I set up client's brokerage accounts online and can review their finances through our website 24 hours a day. This is especially handy when I'm out of town at a tax seminar and one of my clients needs to have money from their account 'yesterday.' Or worse, I get a Jury Summons notice and spend all day in the Santa Ana Court house; instead of eight hours waiting, I can remote access my tax software via the Internet and prepare returns while I wait."

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

"More offices will make the transition from paper files to scanned documents. By scanning and saving client's W-2s, 1099s and other pertinent tax and individual information, the tax professional will save time when needed to review

‘old paperwork.’ Ten years ago, when a client called needing information,

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majority of your income is earned in the first quarter, it is very important to make the most of that limited time.”

What Sonya’s peers had to say about her:

Sonya is an amazing woman who is striving to achieve new and innovative technological

impacts into her profession. She has a wealth of knowledge and enjoys teaching others. She makes our profession enjoyable and entertaining. At the same time, she strives for perfection in all aspects of her work and home life. Sonya is truly a leader in our industry and age group.

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Technology

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