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TECHNOLOGY

40 Under 40 Honoree: Tracy Gaspardo Mortenson, JD — 36

Executive Editor, CCH, a Wolters Kluwer business, Riverwoods, IL

Aug. 29, 2007

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Executive Editor, CCH, a Wolters Kluwer business, Riverwoods, IL

EDUCATION: BS Accounting — University of Illinois; JD

— Georgetown University Law Center

FAMILY: Husband Michael; Sons Lucas (5) and Mitchell (4)

HOBBIES & INTERESTS: painting, tennis, reading/writing, traveling, wiping noses & getting juice

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

“There are actually two pieces of technology that I could not live without.

The first is my BlackBerry. The other day, I responded to a customer, approved a hiring and revised a presentation, all from the bleachers at my son's

Little League game. My BlackBerry not only allows me to be more efficient, but it helps in my struggle to maintain the work-life balance that is precious to

us all. My second lifeline is CCH@Hand. Through the CCH@Hand console, I can perform tax research without any interruption to my daily workflow. I can search multiple sources — Google, my desktop, TRN and key industry websites — without leaving the PowerPoint or Word document I am creating, and then easily

integrate my search results into my work product. We're all looking to maximize efficiency, and CCH@Hand is an invaluable partner in this effort.”

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

“We will see an even greater reliance on technology as firms struggle to respond to staffing shortages caused by the impending demographic shift. As baby boomers retire, there will be a need to recruit, hire and train at a record-breaking pace. In order to do so, firms will be forced to rely even more heavily on productivity tools, not only for technical efficiency, but also for training and professional growth. In addition, a greater emphasis on people management and career development will be necessary in order to attract new generations to the industry. Trends also suggest a further segmentation of the profession, which will require increased technical skills, greater efficiency and improved client service. Firms must continue to find ways (such as outsourcing) to effectively leverage niche services so that they're able to offer the market a fully integrated tax, accounting and financial planning package.”

What Tracy's peers had to say about her:

Tracy's previous experience as both a tax attorney and senior tax consultant at PricewaterhouseCoopers provide her with the perfect insight into customer's needs because she was one. She is often a clear, practical voice of direct experience when we are developing products or enhancing existing lines. This perspective, combined with her natural enthusiasm and intellect make her a charismatic and innovative leader.

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