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OBVIOUS.

Sep. 01, 2007

From the September 2007 Issue

As the accounting profession ages, the gap in experience that resulted from increased education requirements in the early 1990s is growing more and more obvious. In addition to staffing challenges, the profession needs to identify a new core of leaders to help guide the profession through the technological changes it will face in the coming years.

According to the AICPA, “nearly 75 percent of current AICPA members will reach or approach retirement age in the next 15 years.” This means that accounting firms, already experiencing up to 20 percent attrition in their professional workforce, will have to focus even more on attracting and retaining qualified staff.

Fortunately, college students are returning to the accounting profession in greater numbers, and a report from the National Association of Colleges and Employers states that accounting has become the number one major on college campuses nationally. Post-graduate numbers are also rising fast, with an increase in accounting Masters’ degrees rising by 30 percent through 2005. Some of the credit for these gains among college students can be attributed to the AICPA’s Young Professionals Program and the “Start Here, Go Places” campaign, the latter of which advises young students on the benefits of becoming a CPA.

So the good news is that a flood of new professionals will soon quench the drought, but who will be there to channel the waters? Who will be the mentors of these newly accredited tax and accounting professionals? Who will be the leaders of the not so distant tomorrow?

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All of the 40 Under 40 Honorees were nominated by their peers or others working in and around the accounting profession.

[Liz](#)
[Alexander, CPA —](#)

Owner, Elizabeth Alexander CPA, Arlington, TX

Liz is so special because she goes above and beyond and her expertise in QuickBooks has made the daunting chore of taxes not only easy, but fun.

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[Will](#)
[Breiholz, 37](#)

General Manager, BQE Software, Torrance, CA

Will is a great leader in his profession. He understands technology, markets and people. He always finds ways to improve his product and company by working relationships and enhancing his products.

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[Kyle](#)
[Brownlee, CSA, RSC — 33](#)

CEO, Wymer Brownlee Tax & Financial Management, Enid, OK

It's all about the "WOW!" experience that Kyle and his firm provide their clients. His initial vision to add investments and some insurance services to what had

previously been mainly a tax and write-up firm provided an opportunity for

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offshore back office of bookkeepers to provide support data-entry work to assist U.S. bookkeeping staff in doing client bookkeeping work on a timely basis.

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Pedro

de Armas, CPA — 37

Partner, Verdeja & De Armas, LLP, Coral Gables, FL

Pedro became a named partner of Verdeja & De Armas, LLP at only 32 years old. His firm has become one of the largest local firms in South Florida.

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Chris

Fraser, CPA.CITP, MBA, MCP, CISA — 38

Senior Manager, Sunera Business Consultants, Tampa, FL

Chris has a unique ability to lead among extremely driven professionals in that he maintains respect and genuine concern for all of his coworkers and peers, and always takes the time to listen to their needs.

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Tracy

Gaspardo Mortenson, JD — 36

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

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.

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it comes to creating a work environment unmatched in other companies. In return, clients get the best possible service and attention from “happy” employees.

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Rebecca

Gill — 36

VP, Technology Group International, Detroit, MI

Rebecca is an intensely motivated professional who cares deeply about the needs of others, both in professional settings and through her personal community involvement.

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Sasan

Goodarzi — 39

Vice President & General Manager, Professional Tax Business, Intuit, Inc., Plano, TX

As Intuit's vice president and general manager of the professional tax products group, Sasan is responsible for helping define and develop the next generation of professional tax preparation software and services for accountants.

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Andrew

Hatfield — 32

Chief Strategic Officer, Acct1st Technology Group, LLC, Dallas, TX

Andrew understands process development within firms to achieve document management, workflow, scanning, data migration and client communication initiatives. He has developed unique concepts to standardize and simplify processes within accounting firms.

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Trey

James — 36

President & CEO, Xcentric, LLC, Alpharetta, GA

Trey is leading the profession into the world of ASP hosted applications. The Gray Matter product that he created inside Xcentric is the only one that I know of that allows a practice to host all of their applications in one place and to obtain all the benefits of a hosted solution.

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Glen

Keenan, CPA — 36

President, XpitaX LLC & XCM Solutions, LLC, Braintree, MA

Glen has been instrumental in educating the accounting industry on the advantages of properly executed outsourcing, developing many of the standards and controls used in outsourcing for accounting today.

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of Enterprise Sales for the GoFileRoom system, he has accumulated years of development, sales and marketing experience...

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Jason

Lawhorn, CPA — 32

Operations Principal, Lawhorn & Associates, PLLC, Knoxville, TN

Jason has been integral in his firm's success, with a vision for growth that centers on technology. Lawhorn & Associates is a family owned business, and Jason has helped the firm significantly expand client services and elevate efficiency to unprecedented levels via online, integrated processes.

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Nancy

Lee, MBC, BBA — 36

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

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.

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Bob

Lewis, CPA.CITP — 37

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[Mackintosh, CPA.CITP — 34](#)

VP Strategic Marketing, Thomson Tax & Accounting, Dexter, MI

Teresa is a stellar example of professional leadership and someone dedicated to continually educating the profession on advanced technologies and best practices.

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[Paul](#)

[J. Mamo — 39](#)

Executive Director, Development Services

– Electronic Tax Admin., IRS, Oak Hill, VA

Paul is a young and vital leader in public technology and policy development at the IRS. He was one of the architects of the Free File Alliance that is now recognized by the President as being a model public-private partnership.

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[Angie](#)

[Martin, MPA — 35](#)

Director of Education, Lane Gorman Trubitt, LLP, Dallas, TX

As the Director of Education at Lane Gorman Trubitt, L.L.P., Angie leads the learning initiatives that keep the staff prepared for new technology, technical issues and professional development needs.

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Ryan

McCowan, CPA.CITP — 35

Partner, Greene & McCowan, CPAs, London, KY

Ryan continues to emerge as a leader in the tax and accounting profession, consistently improving his firm's workflow processes by implementing smart technology, including integrated software solutions and web-based services.

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Marty

McCutchen, CPA — 35

President & CEO, CPA Service Group, LLC, Ft. Worth, TX

Marty has developed a product that will change the face of accounting. His product takes the voluminous accounting standards and simplifies them into a checklist that when completed populates a company's financial statements .

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Rhett

Molitor, CPA, MCSE, CDIA+ — 34

Sr. Manager, Training & Consulting, CCH, a Wolters Kluwer business, Riverwoods, IL

Rhett has built a dynamic team of consultants on the most critical, cutting-edge applications on the market today.

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Kevin

O'Connell, CPA — 39

Managing Partner, Macias Gini & O'Connell LLP, Walnut Creek, CA

Kevin is an entrepreneurial go-getter, a thought leader in his field, and his leadership style is creative and proactive.

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Sonya

O'Connor, EA — 31

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

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.

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Scott

Ogle — 32

Chief Operating Officer, Sageworks, Inc. – the makers of ProfitCents, Raleigh, NC

Scott continues to exemplify above-and-beyond dedication to customers. He is a tremendous professional who also has a true passion for helping others, which shines through his actions on a daily basis.

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Schornack, ACH — 37

CIO, InterceptEFT, Fargo, ND

Chad's company, InterceptEFT, partners with many tax and payroll software vendors to offer electronic transaction processing to practicing accountants around the country.

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Mark

Severance, MBA — 32

Director of Sales & Marketing, Arxis Technology Inc., Simi Valley, CA

Mark is a true leader, not only within Arxis Technology, Inc., but within the accounting software VAR community.

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Donny

C. Shimamoto, CPA.CITP — 31

Managing Director, IntrapriseTechKnowlogies LLC, Honolulu, HI

Donny Shimamoto is a valued member of the AICPA's Information Technology Executive Committee. He has added a strategic, consultative and younger professional's viewpoint to our committee's strategic planning process, which has proven invaluable.

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Ian

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Brian

Steinert — 33

**Product Manager — CCH, a Wolters
Kluwer business, McPherson, KS**

Brian brings strong practitioner experience and an intent focus on professionals' needs to his role at CCH.

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Denise

Stubbs, CPA, MBA — 31

**Manager, Litigation Support Dept., Morrison Brown Argiz & Farra, Fort
Lauderdale, FL**

Denise is an outstanding young person in our profession. She has been involved in the FICPA for a number of years, speaking to college and high school students about the benefits of being a CPA.

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Timur

Taluy — 31

VP, FileYourTaxes.com, Oxnard, CA

Timur is one of the leading technologists within the tax software community. The larger tax software companies, such as HR Block and Intuit deeply respect Timur's opinion, vision and direction.

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[Joel](#)

[Thomsen, CPA, CFE, AIE, ARA, AIRC — 39](#)

Audit Partner, Eide Bailly LLP, Fargo, ND

Joel came to Eide Bailly with an idea to help the firm grow its insurance practice. In only four years, he has taken the firm from virtually an unknown accounting firm in the insurance industry to the seventh largest firm in terms of premiums audited.

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[Dave](#)

[Wyle, CPA.CITP — 35](#)

President & CEO, SurePrep, LLC, Newport Beach, CA

Dave is a true visionary and technology leader in the accounting industry. In the past 10 years, he has led the paperless revolution by developing a paperless Audit tool (ePace!) now called ProSystem fx Engagement, developing a paperless workflow tool for 1040 tax preparation (SurePrep Express) and developing the first OCR application that will read the data from source documents directly into tax software (1040Scan).

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Technology

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