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ADVISORY

40 Under 40 Honoree: Brian Steinert — 33

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

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

EDUCATION: BA Accounting; BA Business Education — Bethany College

FAMILY: Wife Casey; Children Mikaela (12), Nelson (10), Corbin (8), Johanna (5)

HOBBIES & INTERESTS: playing with his children and attending their events, running, hiking, skiing, mountain climbing, golfing, and just about anything else that can be done outdoors

PROFESSIONAL AFFILIATIONS: KSCPA, XBRL

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

“My BlackBerry — the Swiss army knife of a road warrior! It wakes me up in the morning; gives me my daily agenda; reminds me of approaching meetings;

delivers important messages; allows me to stay in contact with coworkers, clients and family; keeps me informed of world events; and entertains me as I travel.”

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

“The profession has been in the midst of major change for a number of years now: less paper initiatives, new scanning technologies, product suites providing more efficiency in workflow, implementation of new methodologies and technology to address changes in audit standards, client portals becoming a popular (and soon the norm) medium for exchanging documents and communication with clients, etc. These will continue to impact the profession for years to come as adoption increases and technologies continue to mature.

“But there is another change on the horizon that is beginning to attract attention and will have just as much impact — the ‘changing of the guard.’ The AICPA states that 75 percent of its membership will be eligible to retire by the year 2020. To prepare for this change, partners of firms will begin planning and executing succession plans to ensure the future viability of the firms they worked so hard to build. Regardless of whether the main issue is addressed through a firm merger or by passing the baton directly to the younger generation, the average age of those in leadership positions will decrease.

“What does this mean? It means that the need and importance of knowledge management, talent management and training will increase. Also, firm culture will begin to mold to the ideals of those taking the reins. According to the CCH Young Accounting Professionals Survey completed in 2006, this includes emphasis on ethical leadership, work/life balance and family friendly policies, implementing performance management systems. From a technology standpoint, this group values comprehensive resources to get the job done, access to the latest technology to aid productivity, and investing in leading tax/accounting software, so the emphasis on the continued development and implementation of innovative technology solutions will mean higher dependence upon and demand from technology vendors.”

What Brian’s peers had to say about him:

Brian brings strong practitioner experience and an intent focus on professionals’ needs to his role at CCH. As the product manager for ProSystem *fx* Engagement, Brian led the effort to create and integrate an innovative new product, ProSystem *fx* Knowledge Tools, with ProSystem *fx* Engagement to allow

firms to address the new risk assessment standards within their existing workflow. Brian spent a considerable amount of time presenting to firms seeking to address the standards and the need to comply. He educated firms through site visits, focus group meetings, and conference presentations on the SAS 103 documentation requirements and how to update their best practices to address the standard. He also worked with clients to develop additional functionality in ProSystem *fx* Engagement to help affected firms manage to the requirements while improving efficiency.

Prior to joining CCH, Brian spent nine years in a large regional accounting firm performing accounting, auditing, consulting, training and internal IT work. After championing the paperless roll-out within his own firm, he spent much of his time consulting with firms across the country and helped them develop standard processes and procedures and roll-out their own paperless initiatives.

In his role as technology training director, he also consulted with firms on the development of internal training programs and was a regular speaker at Boomer Circle meetings and Learning Consortium conferences. He has been a guest speaker at many conferences including The Advisory Board Quarterly Virtual Conference

Series, AICPA TECH+, Kansas Society of CPAs Technology Conference, CCH Annual User Conference, High Tide Conference, etc., on the topics of implementing learning management systems, developing internal training programs, standardizing firm processes and procedures, implementing paperless in a CPA firm, Adobe tips and tricks, and Advanced use of ProSystem *fx* Engagement.

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