

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

TECHNOLOGY

A CPA & Social Media Master: How Dustin Wheeler Shares his Passion for Accounting & Business Technology

Most successful accountants have to be somewhat tech savvy. Dealing with a multitude of tax and accounting programs in their firm, as well as with the various bookkeeping and business management systems their clients use, is a core component of the job.

Isaac M. O'Bannon • Aug. 29, 2012



From the Sept. 2012 Issue.

Most successful accountants have to be somewhat tech savvy. Dealing with a multitude of tax and accounting programs in their firm, as well as with the various bookkeeping and business management systems their clients use, is a core component of the job.

So, too, is keeping up with new technologies as they appear on the market, since these tools may be able to help either the firm or its clients, or both, to be more successful. In the still tough economic times, finding better, faster or more efficient ways of doing things before others do can give a strong competitive edge.

While some professionals bemoan the rapid changes in technology and the challenges in keeping up with them, some seem to be energized by it. The perfect example of this is Dustin Wheeler, a CPA at the Las Vegas firm of Wallace Neumann & Verville LLP (www.wnvcpa.com), where he serves in the roles of tax manager and IT manager.

The practice has more than 500 business clients across a broad array of industries, specializing in tax compliance and planning, audit and review, business consulting, IRS representation and helping clients with accounting technology issues, from

needs analysis and implementation, through establishing internal controls, training and support.

Since joining the practice in 2005, Dustin has helped guide its transition into a more technology-focused practice, including helping implement a fully paperless workflow across the firm. Since then, they've also introduced client portals, a blog and have established a significant social media presence, with the focus squarely on enhancing the productivity of the firm, improving its services, and strengthening client relationships.

In addition to conducting staff technology training and helping to implement efficient workflows, one of Dustin's latest initiatives has been getting many of his small business clients to use cloud-based accounting systems. He says this gives him greater access to client data, which helps him provide a better service to the clients. He's also able to more quickly help them when they need assistance or troubleshooting.

While most of their clients are in the southern Nevada region, through the use of web-based technologies and screen-sharing sessions, which he also helped set up, the firm is able to service some clients from across the United States and other countries. Some clients have even been found through social media, without ever having met them in person.

With this young, but very savvy and ROI-driven CPA helping to guide its technology decisions, Wallace Neumann & Verville scored a 418 on the Productivity Survey (www.CPAPracticeAdvisor.com/productivity), a free online tool that helps firms gauge how their workflow practices and technologies compare to similar practices. It also offers suggestions for how firms can improve.

“Working at a firm where the partners respect the staff and are open to new technologies and processes is the reason we've been successful in transforming the practice,” he said. “Also, the culture and atmosphere are casual and relaxed. We genuinely like our coworkers as friends, and everything overall is very transparent.”

Dustin knows that he's fortunate at his age to already have a significant role with the practice, and says that the firm's respect and encouragement of its staff are among several reasons he enjoys working at Wallace Neumann & Verville. The firm of 16 frequently hosts employee bonding and morale functions, including group lunches on Fridays, dinner parties following tax deadlines, summer family parties and

picnics, Christmas parties and various outings for skiing, golfing, paintball, go-cart racing and even zip-lining.

Frequent readers of this magazine will likely recognize him either as a multi-year 40 Under 40 Honoree, or as one of the professionals who performs accounting software reviews for us. In addition to managing the IT resources at the firm, helping clients with their technology needs and spending some of his free time pursuing technology for us, Dustin also is an ardent blogger on his firm's website (www.wnvcpa.com/blog) and his own (www.dustinwheelercpa.com).

In addition to being a regular attendee at the AICPA Practitioners Symposium and Tech+ Conference, he is active in the local technology and business community and attends several entrepreneurial events. Last year, Dustin attended the Las Vegas Startup Weekend, which the firm sponsored. The event invites entrepreneurs to pitch start-up ideas and receive feedback from peers.

After selecting the top ideas, groups work to create a business model and develop the coding and design for the technology, then test market validation. As a finale, the groups offer presentations to local entrepreneurial leaders and venture capitalists for critical feedback and potential investing. One recent success story from the event is an app that went on to receive a half million dollars in funding. Other entrepreneurial events he participates in include WordCamp and Vegas Jelly.

Idaho Roots

Originally from Caldwell, Idaho, Dustin had discovered his interest in accounting while in high school, where he would go on to compete in accounting competitions with the Business Professionals of America club and ranking fourth in Idaho and in the top 20 in the nation.

“Dissecting frogs grossed me out from becoming a doctor, but accounting seemed to come easy to me,” he said. It also helped that his grandfather was an accountant, and he worked in his parent's music store doing clerical and bookkeeping duties.

Dustin moved to Las Vegas in 2003, after earning a degree in accounting from Brigham Young University – Idaho. The business market in Las Vegas was booming at the time, and his sister, who already lived in the area with her family, helped persuade him to move south. He initially worked for a large local firm, then joined Wallace Neumann & Verville. He recently finished his Masters of Accounting from the University of Nevada-Las Vegas and received his CPA credential in 2011.

Although it might seem Dustin has his hands full with technology, much of it is cloud-based, which allows him to spend quality time with his family. With his wife Monica, formerly a structural engineer, the Wheeler's have two children, five year-old Bryan and 16 month-old Luke. Bryan is just getting active in soccer and baseball, while Luke is busy being a handful around the house.

The family is active in their church and, when the Las Vegas sun heats up and time allows, they like to escape to nearby Mt. Charleston. The nearly 12,000 foot peak, with lodges and camping areas around it, overlooks the city and offers a nearly 30-degree difference from the summer heat. They also take occasional weekend trips to landmarks like the Grand Canyon and Bryce Canyon National Park. Having lived in south of the border for awhile following high school, he also hopes to take the family to the Chichen Itza ruins in Mexico.

Information Box:

Dustin Wheeler, CPA

Firm: Tax Manager and IT Manager, Wallace Neumann & Verville LLP

Location: Las Vegas, NV

www.wnvcpa.com

Practice Specialties: Audit and tax for small businesses and individuals.

Education: BA, Brigham Young University – Idaho; MAcc, University of Nevada – Las Vegas

Favorite Vacation Locations: Peru (Lima, Cuzco and Machu Picchu).

Social Media:

www.facebook.com/DustinWheelerCPA

twitter.com/dustinwCPA

www.linkedin.com/in/dustinwheeler

plus.google.com/u/0/107944863541638894104/posts

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved