CPA
Practice Advisor

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Supervisor, Construction & A/E Team, Somerset CPAs, PC

Indianapolis, IN

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Expo volunteer – Indiana CPA Society booth, Fishers Freedom Festival – Indiana CPA Society booth, Treasurer of Drug Free Marion County, Faith and Finance Committee at Grace Community Church, Construction Financial Management Association's Habitat for Humanity build day, Rebuilding Together Indianapolis

Hobbies: Weightlifting, camping, family activities

Cell phone: Blackberry Pearl

Favorite app: Google Maps. It is awesome to have a navigation system on the phone without having to purchase an external one.

What are some ways your firm/business has gone "paperless" and/or "green" in the last two years?

At Somerset CPAs, we have gone "paperless" and "green" in many ways:

– We electronically scan all individual tax return supporting documentation and save electronic files only.

– We e-file as many tax returns as possible

– All compliance work is prepared in our paperless software system so there is no paper documentation needed.

– We shred and recycle every piece of paper that is not needed so that the paper can be reused.

– All computers are turned off at the end of the work day in order to conserve energy.

– The building in which Somerset CPAs leases its office space was designated LEED

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– We provide filtered water in our kitchens to eliminate need for bottled water.

– Recycling containers for cans, glass and plastic are provided in our kitchens.

– Toner and print cartridges are recycled.

– Marketing newsletters to clients and prospects have been converted to e-newsletters.

– Seminar invitations to clients and prospects are sent via e-mail.

– Most research is completed via web/online methods, eliminating many publications previously ordered and stored in the firm resource center.

– The firm provides a vehicle for business use to encourage carpooling to client locations and firm functions.

– We work with a local not-for-profit called Virtual Scavengers and donate all our used computers and other electronics to their "Geeks R Us" program, which keeps it out of landfill. The equipment gets reused, refurbished or goes to students who use the parts for everything from jewelry to art objects to clocks and GPS systems, even a robot.

How many hours of the day are you plugged in and responsive to client needs? And what tools/products make it possible for you to have flexibility?

I am plugged in approximately 16 hours a day, if not more, as I have a BlackBerry that is linked directly to the firm's e-mail system, allowing me to receive and respond to constantly respond to emails from clients. Somerset CPAs has also provided Internet access through Citrix, allowing me the ability to work from my home computer and remotely gain access to my business desktop and company's network any time that I

need it. I also have a laptop with a wireless card that allows me to access client

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clients through use of LinkedIn, I have been able to utilize LinkedIn as a marketing tool to keep my current clients abreast of various events that Somerset CPAs holds and other local events that I attend that relate to their industry. Somerset CPAs does have a presence on LinkedIn, Facebook and Twitter and has many followers on all three social networks. The firm is able to keep our clients informed of the newest rules and regulations in both the tax and accounting fields via this medium and has been able to gain clients by utilizing such outlets. Somerset CPAs also has various blogs that clients have found very useful and informative. These blogs allow us to provide business insight to our clients and others in our community. While our first blog started a few years ago, we have been able to add other blogs since then as we have seen a demand for information that relates to specific niche areas. We have received feedback from our clients and external parties about the useful information included in these blogs.

What pitfalls or what unwritten rules of social networking etiquette exist, which are frequently missed by others in the profession?

The biggest unwritten rule of social networking etiquette is that if you utilize social networking for business purposes you need to be mindful of publishing personal opinions and personal information that may contradict that of your clients, prospects or employers. It is important to remember that even if you utilize social networking for personal use, you must monitor what information is written on these sites about you and your firm because online comments stay around forever and you never know who may be looking at the different sites, which could cause you to lose clients or a job.

Do you embrace cloud computing?

Yes. Somerset CPAs has various applications that are hosted elsewhere that employees can utilize for scheduling, CPE tracking and payroll reports. Also, as a

treasurer of a small not-for-profit, I find it important that the organization utilizes

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more organizations utilizing these types of applications.

How is cloud computing changing the accounting profession, and how concerned are you with the security issues related to cloud computing?

Security issues are the biggest challenge to cloud computing for public accounting professionals. We have to protect our client's information, and I don't believe a lot of tax and paperless audit software vendors have developed a very secure application that can be utilized over the Internet. The Internet itself is not very secure even with firewalls and everything so I think this will be the biggest obstacle for vendors to work around. Vendors may have the most secure software application, but until there is a highly secured Internet, cloud computing applications for tax and paperless audit may not become mainstream in the public accounting profession for some years.

Do you foresee the majority of firms still implementing servers for the majority of their computing in their offices five years from now or do you think they will be outsourcing this component to vendors who specialize in this area?

I foresee a majority of firms still implementing servers because it is the most secure method of computing, and it is also very hard to get away from what you have known for so long. A lot of firms understand networks and understand the risks involved with networks, whereas cloud computing is pretty new and security issues with the Internet are still big obstacles for a lot of IT Directors.

Do you subscribe to a magazine and/or local newspaper? If so, which ones?

Yes, I receive the *Journal of Accountancy* as a member of the AICPA, and I subscribe to the *Indianapolis Star* newspaper. Sometimes it is better to just get away from technology and read printed works.

What ONE piece of technology could you absolutely not live without?

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able to utilize what they know best to get into all sorts of entertainment venues. It is also a company that is able to weather all types of economies and understands what it is to be an upstanding organization in regards to employees and customers.

Do you use online resources like webcasts for CPE training?

Yes, and I would recommend these to anyone. I utilize them because they are an efficient way to get training without having to spend time traveling. Somerset CPAs also utilizes webcasts to train smaller groups of employees based on specialization needs. We have found that in this economy webcasts are cost efficient and are of a high caliber when it comes to presentation of information.

Do you listen to podcasts? No.

What is an "old school" business practice or process you'd like to see changed in the next five years?

I would like to see the "old school" business practice of having to file any paper documents -done away with. So many companies now are "paperless," and I believe a lot of governmental and financial organizations need to also go "paperless." It is more cost effective and a lot more efficient and timely to file an electronic document versus a paper document. I believe once this practice goes away, governments and financial institutions could save money and become more efficient with document processing.

What sports team/championship event do you absolutely refuse to miss?

I absolutely refuse to miss the Indianapolis Colts play and the Super Bowl. When the Indianapolis Colts play in the Super Bowl, that is a spectacular event, whether they win or not.

What are some of your favorite books, movies, music, websites and TV shows?

My favorite website would be CNNMoney.com and CNN. My favorite music falls

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monitor out to the field.

What operating system and version of Microsoft Office is installed on your work computer? Microsoft Windows XP Version 2002, SP3

Do you have children? I have two children, a son (6) and a daughter (3).

Technology

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