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**What are the key areas of your firm that have seen the greatest change in workflow over the past few years? Are you using automated workflow tools?** I think the greatest change in workflow has been that we no longer route paper files through the office for accounting and tax projects. In the past, paper files would pass from the preparer to the reviewer and finally to our practice administrator for delivery. Now our workflow is controlled by projects and tasks set up in Practice CS. We have been able to utilize an automated workflow because, for the most part, our process is paperless.

**Have you embraced cloud computing for your practice? Are you moving your clients to the cloud?** We have embraced cloud computing with all of our firm software hosted through Infinitely Virtual. We have also continued to move clients to the cloud so that we can share information in real-time.

**On a broader scale, how do you see new technologies changing the accounting profession in the near term (3-5 years)?** In our firm, we work with small businesses by providing bookkeeping, payroll, accounting and tax services. Our goal is to help small businesses succeed by allowing them to spend more of their time managing their business rather than on accounting and payroll. As technologies change, the tools with which we provide these services change, enabling us to become more efficient and provide a better service. I think the most important changes over the next few years will be a reduction in the amount of data entry and an increased level of sharing real-time data with our clients.

**How mobile are you regarding your work? How have mobile devices and apps impacted your productivity and work-life balance?** The ability to work remotely has allowed me to spend more time with my family, especially during busy season.

However, if I really have a lot of work to do, I still prefer to be at my office rather than

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**What tips on social media do you think are essential, but perhaps missed, by professionals and small businesses?** I don't think we've been utilizing social media to its fullest potential so I'm looking forward to reading tips from other firms.

**What single piece of technology do you find the most important in your professional life?** Definitely email. Although I prefer speaking with staff and clients in person, it allows them to contact me with questions at their convenience and helps move projects along more quickly.

**Not including your current employer, what company do you most admire and why?** McDonald's because they built a business model that could be replicated and continued to develop and adapt that model over the years as times changed.

**What brand/model mobile phone do you use?** iPhone

**Do you use a tablet for work purposes?** I have an iPad. I use it everyday for email and as a presentation tool when speaking with prospective clients.

**What is your favorite accounting mobile app, and why?** NetClient CS Mobile App from Thomson Reuters. We will be rolling out this product to our clients over the next few months.<sup>12</sup> **How many monitors do you have on your desktop workstation?** I have been using three monitors, both at work and in my home office, for the past few years and I'm pretty happy with my set-up.

Read more about this year's [40 Under 40 Honorees](#).

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