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Tony T. Chan, CFP[®], EA

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• Financial Planning Network

- The National association of Personal Financial Advisors
- Financial Planning Associations (Past OC Nexgen Chairman)
- Enrolled Agent Society

Career Highlights

- Retired as a Captain (accounting officer) from the US Army Reserve.
- Launched Crossroads Planning LLC to use technology to help bridge financial planning and tax preparation in 2014.
- InvestmentNews 2016 – “40 Under 40” Honoree
- *CPA Practice Advisor* 2018 – “40 Under40” honoree

What are you doing to make a difference in the profession, your community, the world?

I served on the FPA NextGen committee, mentoring the financial planning and accounting students at local university. I try to bridge the gap of financial planning and tax preparation through the help of technology.

Favorite books/websites/speakers:

The most influential speaker that I have meet so far would be Michael Kitces. I have the privilege to met Michael through numbers of conferences. His website Nerd's Eye View and his Potcast is my go to every morning.

What do you see yourself doing professionally in 10 years?

Beside growing my firm Crossroads Planning LLC, I want to continue mentoring the next generation of Financial planner and Tax Adviser. Using technology to move our industry forward.

What accounting conferences do you normally attend? NATP, AICPA

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[See more of the 2018 40 Under 40 Honorees, and the 20 Under 40 Vendor Superstars.](#)

Accounting

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