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Cell phone: iPhone

Favorite app: Urbanspoon – I travel a lot and it is usually pretty reliable in helping direct me to local dining establishments.

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What are some ways your firm/business has gone “paperless” and/or “green” in the last two years? Our firm has implemented a number of initiatives to support a “paperless” environment in our offices. We started a number of years ago in the audit function by implementing our McGladrey Audit Performance System. Most recently, we have started to implement a compliance efficiency process including paperless and workflow solutions for our tax compliance processes.

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? Technology like smartphones, VPN, web hosted applications, software as a service and/or cloud networks have made it much easier for our professionals to stay plugged in. Our firm is very supportive of flexible and remote work options, and we have invested heavily in the required technology to enable our team members to embrace this type of working culture. It has helped me to stay connected and be even more responsive to my client needs when away from the office.

Are you using social networking (such as Twitter, LinkedIn, Plaxo, Facebook) as a marketing tool for your practice/business ... or do you use such sites for personal use only? Have you gained any clients or seen other demonstrable benefits from the use of social networking? Our firm has embraced specific policies related to the use of Twitter, LinkedIn and other social networking sites. We are using the tool to help with marketing and recruiting. I have personally found these sites to be invaluable when trying to find background information on a prospect or new client

that I may be meeting with. These have also been very effective tools to stay in touch

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computing. I believe it is an emerging technology strategy that may be appropriate for certain firms. Our organization utilizes various cloud computing software such as Salesforce, and we also work with our affiliated members by providing them solutions to meet their cloud computing needs.

How is cloud computing changing the accounting profession, and how concerned are you with the security issues related to cloud computing? Like any major technology innovation, it has taken some time for cloud computing to become more accepted in the accounting profession. We have a number of member firms that are currently utilizing this type of technology and absolutely enjoy the benefits and options for more flexible working environments that it provides. As more and more organizations utilize this type of technology I am confident that the organizations that are promoting cloud computing are able to invest more heavily into appropriate security controls. It is important for respective tax and accounting professionals or firms to do their due diligence on the organizations offering cloud computing technology and make sure they have put in place appropriate security controls for their benefit.

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? We are seeing this already in our membership base. We have had limited adoption of cloud computing over the past three to five years, but as more firms implement more firms become curious of the benefits of this type of technology strategy. For small to mid-sized firms, I believe this will present a very attractive technology option for them, allowing them to focus on serving clients.

Do you subscribe to a magazine and/or local newspaper? Yes, I like to stay current on local, regional and national events. I also still like the feeling of having something tangible in my hands to read.

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

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Do you use online resources like webcasts for CPE training? Yes

Do you listen to podcasts? I have not been an active listener of various podcasts at this point.

What is an “old school” business practice or process you’d like to see changed in the next five years and why? Time reporting. As technology continues to help us streamline our efficiency tax and accounting professionals will need to rethink the strategies or principles they use to value or price their services.

What sports team/championship event do you absolutely refuse to miss? The Masters and the Super Bowl

What are some of your favorite books, movies and TV shows? Books: Anything by John Grisham; Movie: “Caddie Shack”; TV shows: “24” (sad to see it go).

What operating system and version of Microsoft Office is installed on your work computer? Windows XP and Microsoft Office 2007

How many monitors do you have on your desk? Two

Technology

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