CPA Practice **Advisor**

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What ONE piece of technology could you absolutely not live without? My desktop computer is still the most used device I own. Even with the advent of smartphones, laptops, etc., most of my productive work is completed on a desktop. I see a day when that will change — with us moving to cloud computing — my laptop will become more important, along with multiple monitor capability.

NOT including your current employer, what company do you most admire and why? Root and Associates. Darren Root has set up his accounting firm to allow him to be away from the office traveling a great deal of the time. He has leveraged the technology to make his firm extremely efficient and profitable. Since I grew up and around our firm, learning from my parents about serving small businesses, I am most impressed by and admire other small companies that employee local staff and serve the area's businesses. Root and Associates is very similar to us in that regard. (No, I am not trying to suck up to the editor! J) I do really admire and respect Darren and his company model.

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 basically "plugged" in as many hours as I see fit; in other words, like most people, I have access 24/7 via cell phone for emails, calls and text messaging. If more in-depth interaction is needed, I have a laptop handy at all times. With Citrix Server in my office, remote access is quite simple. I'm currently working on using my iPad to access office servers as a "lighter" method of access, rather than toting round an 8-pound laptop. I foresee the iPad being a "lighter" tool for quick and easy access to my office information.

Do you embrace cloud computing? We currently utilize cloud computing for research software and analytical software such as ProfitCents. We have also been using an online Spam Filter that has proven to reduce our storage needs for our Exhange server and reducing the resources needed to run the spam software internally. Emails are "scrubbed" before getting into our network. We are also

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would "transmit" the information to the mainframe located 300 miles away via phone line. The handset would be placed in the modem (leased from the phone company) to send the information. Over time, we brought desktops in-house and eventually a domain server network. Now we are looking to take the server out of the equation once again in a much more complex model. With the continual expansion of broadband availability, cloud computing will continue to gain momentum. More proof of this is recent initiatives by large corporations such as Microsoft developing operating systems specifically for cloud computing. Simple short-term benefits will be lower cost for firms, no longer keeping servers up and running; potentially better security if using a reputable company that employs proper datacenter protocol for redundancy and security. Long-term benefits will be an increased value for potential buyers. It will be much easier to transition a firm that is completely "online" to a buyer no matter the distance from the seller. Which brings up another benefit finding and keeping qualified staff — they can be located anywhere and still access the firm's resources. Cloud computing also allows easier and more efficient client collaboration, which may be the most beneficial reason to embrace this option. Our clients can be working in the same files as their accountants, giving them 24/7 access to updated financial information and allowing them to make informed decisions. Traditionally, our clients would get a quick turnaround and have their financial statements early in the month following the month end close. For good reporting clients, they had them by the fifth of the month. But in today's dynamic market, this "quick" turnaround could be "stale." The ability to provide perpetually updated financials will be paramount for some small businesses and differentiate firms that can provide it.

Security is always a concern, even with the information being housed internally. This will require us to use due diligence in finding and using only reputable companies that will invest in proper security. I still feel it is more secure than methods used for 30 years. When speaking to my staff and clients, I ask them how many people "touch" their information when we mail it to them and then how

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possessive of their information. Obviously, we are all fearful of "letting" loose of the client's information, essentially putting our livelihood in another company's possession. But I do believe in the next couple years there will be great strides made to reduce the concern by reducing the exposure with built-in redundancy or backups that would be accessible even if the supplier is out of business.

How many monitors do you have on your desk? Two — one 24-inch and one 22-inch.

What operating system and version of Microsoft Office is installed on your work computer? Windows 7 Ultimate with Office 2010

Do you subscribe to a magazine and/or local newspaper? Yes, I still subscribe to a couple of our local newspapers — *The Belleville News Democrat* and *The Breese Journal* (a small local hometown type). For me, it is still the easiest and best way to get local news. They have a website, but I find it more difficult to navigate when I am looking for information.

What are some ways your firm/business has gone "paperless" and/or "green" in the last two years? Recently, we have marketed our "Green" payroll option, which allows a completely paperless payroll process. Clients submit info online; we process and return all reports and employees online. Employees receive direct deposit and have access to their stubs online through employee self-services. Other initiatives include electronic filing of sales tax returns (which was not efficient until recently), and electronic filing of 1120s now that IL will accept.

Do you use online resources like webcasts for CPE training? Yes, we use various options and vendors. Our payroll department uses the APA for continued education credits. I personally use *The CPA Technology Advisor* for webcasts often for CPE

training, and other staff has utilized various vendors for online CPE training. This

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electronically online and avoid the wonderful hold time listening to their music.

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? We currently use Facebook and Twitter for business and personal purposes. I cannot point to either directly for recent client acquisitions. However, some of them have noticed our presence and commented on our "keeping up with the times," giving our firm the image of being a leader in technology while so many firms are stuck behind.

What sports team/championship event do you absolutely refuse to miss? I am an avid St. Louis Cardinal baseball fan and have not missed an opening day since my first in 2004. Even though it is usually in the tail end of tax season around the first week of April, I make time! And if they are in the playoffs or World Series, I do not miss. Seeing them win it all in 2006 was an experience I will not forget. I was also fortunate enough to attend the All-Star game in 2009, but that was not as exciting as seeing your team winning a championship live! For football, I rarely miss a Dallas Cowboys game. My love for the Cowboys began when I watched Super Bowl 12 on a small black/white TV in the corner of my parents' office (after all it was tax season).

What are some of your favorite books, movies, music, websites and TV shows? I enjoy reading about technology so many of the sites I visit regularly include, CNET, PCWorld, and many others that I access via apps on the phone such as Macworld, Appadvice, iPhone alley, etc. I must admit, *The CPA Technology Advisor* and some other industry-specific sites are also on my must-read list. When reading fiction, David Baldacci is one of my wife's and my favorites; however, I do not seem to find much time for fiction after I get through all the updates on the various periodicals and websites. Historically, I have read more non-fiction, enjoying biographies the most. Recently, we watched the "Bourne" trilogy on our Blu-ray player and was blown away by the movie itself and the picture/sound quality of Blu-ray. We have

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