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Education: BA, University of Virginia

Civic Involvement: Volunteer Young Life leader (10 years), HS Football & Lacrosse Coach, MENSA member

Hobbies: Squash, spy fiction, self-torture via Washington Redskins fandom

What cell phone do you carry? LG Touch. Ironically, I'm sort of a conscientious objector to the smartphone wave. I'd rather be as present as possible where I *am*

and not be a slave to my email (which would undoubtedly occur if I allowed it to get

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contrarian on this subject perhaps. I've invested a ton of man hours in training my staff to be the "concierge" on-call responders to our tax and accounting client needs. I do step in when necessary, but as the president of my company, it's my primary responsibility to set strategic direction, implement our *own* marketing activity and conduct higher-level tasks. And, frankly, that's a direction towards which I coach my tax and accounting professional clients, as well. It's proven to be a fruitful approach.

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? I was an extremely early-adopter with Facebook (from even before it became open to all users in September 2006) and found it to be a fantastic way to stay in touch with my friends and family.

However, I was a Twitter skeptic ... and skeptical of Facebook's utility in the business arena ... until I met Mari Smith (www.MariSmith.com). She was responsible for training such leaders as Richard Branson, Tony Robbins and others in the usage of Social Media for business growth. Hearing her presentation at a marketing conference I attended prompted me to immediately hire her as a trainer for myself and my staff.

I implemented her specific recommendations, and our own internal lead-flow increased by 70%. I quickly created a "beta test" for a select group of our tax and accounting professional clients, and during the 2010 tax season, we managed the accounts for 35 firms. I put together a video of our results (which were astounding), as well as our conclusions from that experience in a video at www.CPAFirmSocialMedia.com.

What pitfalls or what unwritten rules of social networking etiquette exist, which are frequently missed by others in the profession? Well, in my view, Social Media is

truly just like any other medium, so the same kind of social norms exist: It starts with

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and what makes it scalable for tax and accounting firms, is that it's still suitable for a "broadcast" approach.

What are some ways your firm/business has gone "paperless" and/or "green" in the last two years? Our marketing firm was started in response to a demand for a relationship-oriented, conversational print newsletter for use by accounting firms, tax professionals and CPAs. We've printed hundreds of thousands of such newsletters, but after about a year, the same approach was asked for in the realm of email marketing, which has now become our most popular program. In addition to managing social media profiles (primarily Facebook and Twitter) for our clients, we've gone "online" in a major way on behalf of hundreds of CPA and tax professional clients.

So perhaps it's most accurate to say that we've assisted a bunch of tax and accounting firms in *their* transition to a "paperless" method for forming deeper relationships with their clients and prospects.

Do you embrace cloud computing? Sure do! All of our client data is secured in such a system. But our needs are different from those of a tax and accounting firm. I've built a relationship with Roy Keely and the gents over at www.Xcentric.com and plug those guys every chance I get.

How is cloud computing changing the accounting profession, and how concerned are you with the security issues related to cloud computing? I don't feel it's within the area of my expertise to comment on this intelligently. Again, I'd point you to Xcentric.

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

Niche magazines seem to be the one print medium that are poised to survive and

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~~What ONE piece of technology could you absolutely not live without. My brain ...~~
though I don't say that to sound self-aggrandizing. I simply mean that technology is really just tools, and it's ALL replaceable, in my opinion.

NOT including your current employer, what company do you most admire and why? Apple, for their excellent product design, contrarian marketing model (which, interestingly does NOT include much social media) and willingness to take hard stands (restricting pornography on their platforms).

What is an "old school" business practice or process you'd like to see changed in the next five years and why? I'd love to see tax and accounting professionals embrace a more conversational approach to connecting with their clients ... even in the corporate arena. Google, Apple and other corporate giants have blazed that trail sufficiently enough that practitioners should understand that it's no longer necessary to maintain a stuffy, "professional" façade. Clients and consumers are thirsting for financial professionals to be their true "port in the storm" of this economy, and that starts by speaking from and TO the heart.

How many monitors do you have on your desk? One

What operating system and version of Microsoft Office is installed on your work computer? Windows 7, Office 2007

What sports team/championship event do you absolutely refuse to miss? Anytime the Washington Redskins play, and or if my University of Virginia Wahoos would ever get their act together on the hardwoods.

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

Books: "'No BS' Marketing" by Dan Kennedy, "Linchpin" by Seth Godin, "There is No Me Without You" by Melissa Fay Greene (Ethiopian adoption memoir),

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