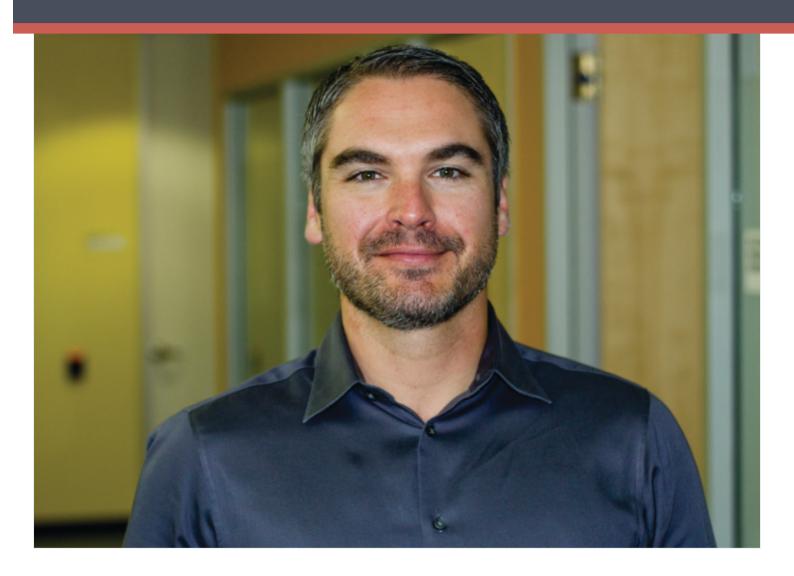
## **CPA**

## Practice **Advisor**

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QuickBooks Product Manager, Intuit

Mountain View, CA

**Education:** Partial undergraduate course work in Management Information Systems, OU

**Hobbies:** Playing the guitar, Frisbee golf, keeping up with the latest technologies, and learning as much as possible about the world of wine.

Cell phone: An iPhone.

Favorite app: This is a hard question because apps are like commodities: they fall in

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have a similar culture at Intuit. We want to not only be where our customers are today but help figure out where they should be tomorrow. You simply can't do that without a culture of innovation.

How many monitors on your desk? I have two 22-inch monitors.

What operating system and version of Microsoft Office is installed on your work computer? I use a Macbook with Parallels VM with Windows XP and Windows 7 and Office 2007. This allows me to work with both Mac and Windows programs as needed.

What are some ways your firm/business has gone "paperless" and/or "green" in the last two years? At Intuit, we have been moving more and more towards paperless, from scanning expense receipts to eliminating personal printers in favor of group networked multi-function devices to reduce the waste of paper and supplies. We even have a recycle program where employees can put things they don't want any longer on a site where others can see it and take it instead of throwing it away or buying a new one.

What is an "old school" business practice or process you'd like to see changed in the next five years and why? NOT BACKING UP!!! I have talked with too many people over the years who didn't bother to back up anything and ended up losing everything. My hope is that as technology gets better, backing up will become automatic for all computers. Hard drives are dirt cheap and lots of cloud backup options that work pretty seamlessly are there today, but there is still that resistance to change, until they learn the hard way.

Do you embrace cloud computing? Yes, I believe that cloud computing can really make information available anytime, anywhere. That is becoming more and more important, especially as "non-computer" devices play a larger role in both personal

and business life. By leveraging cloud computing, I can access my files and

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and, as with everything, you should do your due diligence vetting any new company or technology to which you are entrusting your business. There is no reason why doing things online can't be as secure as working on your own hard drive. But please, don't use the same username and password for every site you visit on the Internet!!

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? I predict there will be more and more outsourcing. Most firms I know aren't in the business of doing IT; they are in the business of serving their clients. Technology is just an enabler to make that happen. Most customers I speak with would gladly pay someone else to take care of their technology needs, as long as they could trust the vendor to do what needed to be done. When solutions become more robust, cheaper and more commonplace, it will end up being the only way to do it. Maybe not tomorrow, but soon enough.

Do you subscribe to a magazine and/or local newspaper? I subscribe to *Harvard Business Review* and *PC Magazine* on my iPad; and *PC World*, *Macworld* and *Fast Company* in paper. They help me keep on top of business and technology trends, which is an important part of being able to deliver what our customers will need not only today but tomorrow, as well.

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 plugged in 12 to 13 hours a day thanks to my iPhone, iPad and laptop.

What ONE piece of technology could you absolutely not live without? I couldn't live without my iPhone. It keeps me connected to email, manages my calendar, and gives me access to social networks. It also helps me disconnect by allowing me to

carry games, music, and movies all on one device. I hate having too many things in

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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 use Facebook and LinkedIn, in addition to the QuickBooks Community website, to keep up with what customers are asking for and struggling with. I then use that information to help improve QuickBooks.

What pitfalls or what unwritten rules of social networking etiquette exist, which are frequently missed by others in the profession? The most important one is don't post anything you don't want your mother or your boss to see. It is easy to get complacent and forget that the world is watching.

What sports team/championship event do you absolutely refuse to miss? I never miss Ninja Warrior. You probably have never heard of it, but it is the most impressive sport I have ever seen.

What are some of your favorite books, movies, music, websites, and TV shows? My favorite movies are "True Romance", "Pulp Fiction" and "The Usual Suspects." My favorite music artists are Bob Dylan, Leonard Cohen, Ween and Willie Nelson. As for TV shows, I enjoy "Psych", "Mythbusters" and "Entourage."

Technology

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