

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

I'm often asked what technology solutions I use in my practice. There are so many, and I understand that technology can be overwhelming. In this month's column, I will discuss all the tools I use in my practice, both on the road and in the office, as CEO of RootWorks, and as Executive Editor of *The CPA Technology Advisor*.

I will always attest that cost is not a motivating factor in the majority of my technology decisions. What it comes down to is that I have to really "love" the device — and to love it means that many factors must be present. Major factors include convenience, efficiency and fun. If a device provides me with ultimate convenience, then most likely my efficiency and effectiveness will significantly increase. If it's fun on top of that, well, that's just icing on the cake.

My most recent hardware purchase was Apple's iPad, which has far exceeded my expectations. I waited a few extra weeks to order it so I could get the 3G version. It was well worth the wait! It's fast, easy to use and highly convenient.

My perspective, to put it simply, is that the iPad is like a big iPhone, but it is so much more functional based on scale. Because of its larger screen, the iPad makes it easier to view and navigate the web, emails, electronic books and documents ... everything really. Don't get me wrong, I don't think the iPad replaces a laptop, but it is certainly more convenient for answering emails and web browsing. Plus, it seamlessly syncs with Microsoft Exchange. You can also perform online banking with ease, download magazines and newspapers, and even use the ABC Television app to watch some of your favorite shows. When I travel, I like to have my iPad to perform all these daily functions. It's lighter than my laptop, offers a bigger screen than my iPhone, and the battery life is more than 10 hours! You can't beat that.

I take other needed devices when I travel, as well. I carry what I call my *Communication Trifecta*. That is, my three mission-critical solutions: a MacBook Pro

15-inch laptop with 8GB of RAM and a solid state hard drive with no moving parts,

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

I do want to add a quick note on cost. After reviewing all my data plans, I realized my lack of cost-effectiveness. Consider the fee for each device: My iPhone monthly data plan runs over \$100; the fee for my USB Modem is about \$70/month; the iPad is another \$30/month. It really adds up. I decided the best and most cost-effective plan was to switch my USB modem for a Verizon MiFi 2200. The MiFi 2200 supports 24/7 access to the Web, like a USB modem, but also allows simultaneous access for up to five wireless devices. In other words, it functions like a wireless access point. With the MiFi, I can ditch additional data plans and save a ton of money over the long term.

A column on technology wouldn't be complete without discussing solutions for the office. In my firm, we exist in a PC environment. Everyone has a Dell. I work on a very fast desktop machine with three 20-inch flat panel monitors. My monitors, a Fujitsu high-speed scanner, and an HP desktop printer are all mounted to an Egotron stand for ultimate convenience and efficiency.

My home office is all Mac. I plug my MacBook Pro into an Apple LED 24-inch Cinema display, and I'm off and running. Many people have asked me how I function effectively working in both the Mac and PC environments. Honestly, it is not an issue. When working from home, if I need to work within a PC-only program, I simply VPN into the office and work directly off my Dell. Additionally, Microsoft Office is completely interchangeable between the Mac and PC platforms, as is the Internet and Microsoft Exchange.

One last component of my technology world worth noting is DropBox (dropbox.com), a cloud-based application that is critical to my daily work. DropBox allows me to synch all files on all devices. I often require access to work files while on the road, but need to work on them from my laptop and not via a remote connection. With DropBox, I can have files on my desktop while traveling and still know that

changes are being updated across access points, including my laptop, office servers,

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved