



**M. Darren Root, CPA.CITP, Executive Editor**

Darren is the Executive Editor of The CPA Technology Advisor, and remains in public practice as the principal of Root & Associates, LLC, in Bloomington, Indiana, and president of his consulting practice, RootWorks. He formerly served on the Board of the AICPA's CITP Credentials Committee and is a former member of the Board of Directors for the Indiana CPA Society. He speaks at dozens of professional organizations each year and frequently serves as a guest lecturer at Indiana University's Kelley School of Business.

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**L. Gary Boomer, CEO, Boomer Consulting, Inc.**

Gary is CEO of Boomer Consulting, Inc., an organization that provides planning and consulting services to leading accounting firms. Gary is recognized in the accounting profession as the leading authority on technology and firm management. For over a decade, he has been named by *Accounting Today* as one of the 100 most influential people in accounting. He is also a member of IPA's 10 most recommended consultants.

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**Jim Boomer, CPA.CITP, CIO, Boomer Consulting Inc.**

Jim is the director of the Boomer Technology Circles™ and an expert on managing technology within an accounting firm. He also serves as a strategic planning and technology consultant and firm advisor in the areas of performance and risk management.

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**Jim Bourke, CPA.CITP, CIO and Partner, WithumSmith+Brown**

Jim is a Partner, Member of the Board of Directors and Management Committee and CIO at WithumSmith+Brown, New Jersey.

Jim has been a frequent speaker to many State CPA Societies, the AICPA, International Accounting Associations and many other organizations on topics specifically related to technologies used by the profession today. Jim has also authored many articles dealing with firm technology issues.

Jim is Past President of the New Jersey Society of Certified Public Accountants. In addition, Jim currently Chairs the AICPA's CITP Credential Committee and is Chair-elect of the AICPA's Tech+ Conference and current member of AICPA Council. Jim is also a member of the board of directors for the New Jersey Technology Council.

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### **David Cieslak, CPA.CITP, GSEC, Principal, Arxis Technology, Inc.**

David is the Principal with Arxis Technology, Inc., a computer consulting firm with offices in Southern California, Chicago and Phoenix. He specializes in micro-computer accounting systems, information security, the Windows operating environment, systems development and project management. David is also known as "Inspector Gadget".

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### **J. Carlton Collins, CPA, President, ASA Research**

Carlton is a lecturer, technology & accounting systems consultant, and author of the monthly Technology Q&A column for the Journal of Accountancy. Recipient of the AICPA's Lifetime Technical Contribution to the CPA Profession Award; Chairman of the Southeast Accounting Show - the South's largest CPA event; and Recipient of multiple Outstanding Discussion Leader awards from State CPA Societies.

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### **Scott Cytron, ABC, President, Cytron and Company**

Scott H. Cytron, ABC, is president of Cytron and Company, known for helping companies and organizations improve their bottom line through strategic public relations, communications, marketing programs and top-notch client service. An accredited consultant, Scott works with companies, organizations and individuals in professional services (medical, legal, accounting, engineering), high-tech and B2B/B2C product/service sales. Contact him at [scott@cytronandcompany.com](mailto:scott@cytronandcompany.com) and visit his blog, [www.absolutecytron.com](http://www.absolutecytron.com).

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### **Ron Eagle, CPA, President and Board Chair, The Information Technology Alliance (ITA)**

Ron's long and distinguished career now spans more than 40 years, most of it spent in starting, or turning around, and then growing consulting divisions inside CPA firms. Ron was the #7 consultant in the Charlotte office of Arthur Andersen in 1970, the PIC of the Information Resources Division of Cherry Bekaert in 1988, the PIC of Consulting at George Olive (now BKD) in 1990, and the EVP of Consulting Services at Centerprise Advisors (now UHY Advisors) in 1999. Becoming active in ACUTE in 1988, Ron spoke and became an ACUTE Board member and President. In 1997, Ron led the reengineering of ACUTE that resulted in the creation of the Information Technology Alliance (ITA), and has been its President and Board Chair since 2002. From "wiring boards" to "working in the cloud", Ron's career skills and leadership vision have continuously adapted along the full spectrum of modern business technology.

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### **Chris Frederiksen, CEO & Chairman of 2020 Group USA**

Chris Frederiksen is one of the best-known and most highly-rated seminar leaders in the world as well as a consultant to accountancy firms worldwide. He is also a practicing accountant in San Francisco, California. His experience includes partnership positions with two international CPA firms and building several independent practices in the San Francisco Bay Area. As a consultant for the past twenty years, he has been helping small and medium sized accountancy firms achieve their goals of greater profitability and greater personal satisfaction for the owners. He is now committed to helping CPAs and tax professionals excel in financial services, strategic planning and other new service areas.

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**Brent Goodfellow, CPA, President/CTO, One Tech, LLC**

Brent provides expert technology services to One Tech, LLC clients as President and CTO. As a Certified Public Accountant and a Microsoft Certified Professional, Brent enjoys demonstrating to clients how investments in technology can improve overall business results.

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**Robert R. Harris, CPA/CFF, CFE, Cr.FA, Managing Director, Harris, Cotherman, Jones, Price & Associates**

Bob is the Managing Director of Harris, Cotherman, Jones, Price & Associates. He has 35 years in public accounting and is recognized as one of the top 100 most influential people in accounting as published in *Accounting Today*

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**John H. Higgins, CPA.CITP, Strategic Advisor, CPA Crossings, LLC**

John serves as a strategic technology advisor to CPAs in the planning and deployment of effective technology solutions. As a principal at CPA Crossings, John specializes in facilitating the development of strategic technology plans, paperless workflows, client portal solutions and a comprehensive digital practice model. John’s primary qualification is his passion for helping CPAs achieve success by leveraging technology. He has extensive knowledge and experience working with CPAs throughout the country.

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**Tom Hood, CPA.CITP, CEO, The Maryland Association of CPAs & the Business Learning Institute**

With a social media outreach in the tens of thousands, Hood is well known for his pioneering use of Second Life, multimedia and social networking tools to communicate and educate. That is what *Accounting Today* magazine said in their 2010 profile of Tom as one of the Top 100 Most Influential People in the CPA profession (his sixth time). Tom has been involved in technology throughout his career from starting the first CPA Computer lab as a volunteer for the MACPA to earning the CITP credential.

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**Randy Johnston, Executive Vice President, Network Management Group, Inc. & K2 Enterprises**

Randy has assisted firms as well as software and hardware companies use technology in the best way possible for over 35 years. He is nationally known as an engaging speaker, an insightful consultant and brings people, management and technical skills together when called on as a consultant or advisor. He has been involved with so many computer products and services through the years, you are certainly using at least one item he has influenced or helped build.

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**Roman Kepczyk, CPA.CITP, President, InfoTech Partners North America, Inc.**

Roman is an outsourced technology partner working exclusively with accounting firms in leading them towards optimizing their production processes within their tax, audit, client service and administrative departments as they transition to today's "less paper" environment. Over the past fifteen years he has independently partnered with close to 300 firms (including 26 of the top 100) as their trusted information technology advisor. He is a highly demanded speaker and has authored hundreds of articles as well as "Quantum of Paperless: Partner's Guide to Accounting Firm Optimization" which is available on Amazon.com.

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**Gregory L. LaFollette, CPA.CITP, Sr. Manager – Tax & Technology Consulting, Eide Bailly, LLP / Executive Editor – TheTechGap.com**

Began public practice in 1973, formed LaFollette, Jansa, Brandt & Co. in 1980. Joined Thomson Reuters as VP of Product Strategy in 1998. In 2005 became Executive Editor of The CPA Technology Advisor. Now semi-retired and consulting specifically with vendors seeking to sell products and services to the tax and accounting profession. Received professional training at Augustana College in Sioux Falls, SD and is a graduate of and former staff lecturer at the AICPA National Tax Institute. Active volunteer with the AICPA serving as a founding committee member of the CITP Credential Committee for four years and then as Chair for three more years. Also served on the Top Ten Technologies Taskforce, the National Accreditation Commission (ad hoc), and the Tech+ Conference Planning Committee. Currently serving on the Technology Advisory Board for the Journal of Accountancy. Greg is an active speaker in the profession and presents at dozens of conferences every year. As a pioneer in adapting technology for the profession he has produced/presented over 300 podcasts and webcasts. Greg and his bride of 38 years choose to live in their hometown of Sioux Falls, SD. They have one grown daughter in New York City.

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**James Metzler, CPA, Vice President, Small Firm Interests**

James is Vice President of Small Firm Interests at the American Institute of Certified Public Accountants (AICPA). In this role, he leads AICPA initiatives aimed at serving the needs of practitioners, including the activities of the Private Companies Practice Section as well as the Institute's specialized communities and accreditations. He also serves as an advocate for small firms on standard setting, legislative matters and practice issues and as liaison between the AICPA and its member firms. Jim reports directly to Barry Melancon on works with him on a multitude of professional issues.

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**Edi Osborne, CSPM, CPBA, CPVA, CEO, Mentor Plus**

Edi is a nationally recognized expert in the area of performance measurement and management. For over 20 years, her goal has been to transform the accounting profession from "service centric" to "client centric". She does this by teaching practitioners how to utilize their accounting skills and apply emerging technology to improve business performance.

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### **Dana R. (Rick) Richardson, CPA.CITP, Managing Partner, Richardson Media & Technologies, LLC**

Rick Richardson is managing partner of Richardson Media & Technologies LLC, a multi-media and strategic technology consulting company. Prior to forming his current company, he had a 28-year career in technology with Ernst & Young, the last twelve years of which he served as National Director of Technology. Rick has been named to the "Technology 100" – the annual honors list of the 100 key achievers in technology in America and honored by the American Institute of CPAs with two lifetime achievement awards for his contributions to the profession in the field of technology. He has been named as one of the "Top 100 Influential People in Accounting" by Accounting Today magazine. He is a sought after speaker around the world, providing his annual forecast of future technology trends to thousands of business executives, professionals, community leaders, educators and students.

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### **Doug Sleeter, Founder and President, The Sleeter Group**

Doug's in-depth knowledge of accounting software solutions and his "systems" approach to solving accounting problems for the SMB market have earned him the reputation of being one of the nation's leading small business accounting software experts. Doug has been named one of the Top 100 Most Influential People in Accounting in 2008, 2009 and 2010. Doug provides expert level support and consulting to hundreds of accounting solutions consultants through the Sleeter Group Consultants Network, a group of highly trained experts. He is the host of the Sleeter Group's annual Accounting Solutions Conference, bringing together consultants and software developers from across the U.S., Canada, and the Caribbean. Doug is the author of over 40 reference books and courseware materials, and writes a regular column, "The QuickBooks Advisor," for *The CPA Technology Advisor* magazine.

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### **Robert H. Spencer, PhD, Principal, Twenty Seconds In the Future**

Dr. Bob Spencer has been a pioneer in the accounting technology field. Over the past 30 years he has helped design some of the most popular applications used in the accounting profession, as well as consulted to and assisted accounting firms with the integration of modern, technology based, workflows to improve productivity and realization. He is a recognized author and a regular contributor to a number of industry publications.

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### **Brian Tankersley, CPA.CITP**

Brian Tankersley is a CPA and consultant based in Knoxville, Tennessee. Brian is a frequent speaker at continuing education courses on auditing and technology for K2 Enterprises and the American Institute of CPAs, and is a senior faculty member with Becker Professional Review. Brian writes and publishes a nationally recognized blog on accounting and technology (<http://blog.bftcpa.com>).

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### **Rick Telberg, President and CEO, Bay Street Group LLC**

Rick is a veteran analyst, advisor, commentator, editor and publisher. As President and CEO of Bay Street Group LLC, he provides custom research, marketing, communications, strategic consulting, publishing and digital media for the professional tax, accounting and finance community and the vendors who serve it. But he may be best known as the accounting profession's leading commentator through his long associations with the American Institute of Certified Public Accountants and *Accounting Today* magazine.



### **Jennifer Wilson, Cofounder and Partner, ConvergenceCoaching, LLC**

Jennifer is a partner and co-founder of ConvergenceCoaching, LLC, a leadership and marketing consulting and coaching firm that specializes in helping leaders achieve success. Named to *Accounting Today*'s 100 Most Influential People in Accounting" and IPA's Top 10 Most Recommended Consultants lists, Jennifer is a former partner for BDO Seidman, LLP and Vice President of Sales and Customer services for Sage Software, Inc. Jennifer is a frequent speaker, teacher, facilitator, and writer within the profession. Learn more about the company and its services at [www.convergencecoaching.com](http://www.convergencecoaching.com).



### **Geni Whitehouse, CPA.CITP, CSPM**

Geni is a CPA and self-proclaimed nerd on a mission to banish boring from the worlds of accounting and technology. Equally amused by sales tax and infinite loops, she has quite a challenge on her hands. She is a frequent writer, speaker, blogger, tweeter and the author of "How to Make a Boring Subject Interesting: 52 ways even a nerd can be heard" which is available on Amazon.com.

Geni serves as the Countess of Communication for three different organizations:

- Mentor Plus [www.mentorplus.com](http://www.mentorplus.com)
- Brotemarkle, Davis and Co. LLP [www.bdcocpa.com](http://www.bdcocpa.com)
- Even A Nerd Can Be Heard [www.evenanerd.com](http://www.evenanerd.com)