

# Top 100 Most Influential People

THE THOUGHT LEADERS AND  
VISIONARIES WHO ARE  
SHAPING THE ACCOUNTING  
PROFESSION

Accounting's biggest issues p. 16

The value of mentors p. 23

Work-life balance p. 20

Who they think is influential p. 24

# Mapping spheres of influence among the Most Influential

LIKE AMERICA, ACCOUNTING IS LARGE — it contains multitudes. It is auditors and tax preparers and bookkeepers, but it's also financial planners, technology resellers and consultants, marketing experts, educators and regulators, association leaders and legislators. It is veterans and newbies, leaders of large groups and individuals who've struck out on their own.

The Top 100 Most Influential People is *Accounting Today's* attempt to map as much of that multitude as we can, and to identify those who point the way in each area, those who set an example, who teach, inspire or, occasionally, castigate, or who otherwise stand out from the crowd.

There are only 100 spots, so we can't include everyone who makes a difference. We note a number of extra people

who are worth paying attention to in our "Ones to Watch" section (see page 19), but that still leaves some people of influence to go unmentioned. Not being on the list doesn't mean someone is or has become uninfluential, only that the T100 is a sample — a broad and representative sample, we hope, that covers many of the areas that are most immediately affecting the accounting profession, but still only a sample.

## WHAT THEY'RE THINKING

If you had a table big enough to gather these hundred around, the conversation would, no doubt, be fascinating. With that in mind, every year we aim for the next best thing: To ask them what they're thinking on a short list of topics.

As always, we start by asking them what the most important issue facing the profession is; ensuring the future through succession planning and drawing in new accountants topped the list, but those aren't the only issues out there (see page 16).

With personnel issues on everyone's mind, we also asked them if they had ever had a mentor — most had, and often more than one (see page 23) — and we asked if they had managed to attain the Holy Grail of work-life balance, a subject on which they were surprisingly upbeat (see page 20). Finally, we asked them who they think are the most influential people, and graphed the results (see page 24).

With that, we hope you enjoy the 2015 Top 100 Most Influential People in Accounting! — The Editors



### Karen Abramson CEO, Wolters Kluwer Tax & Accounting

Abramson provides steady leadership to one of the leading software and information providers to the profession, helping it surefootedly negotiate one of the greatest challenges the vendor community has yet to face — the move to the cloud.

**Career Highlights:** CEO, Wolters Kluwer Tax & Accounting, 2013-present; president and CEO, CCH, 2012-2013; president and CEO, Wolters Kluwer Health Medical Research, 2006-2012; vice president and general manager, CT Corsearch, 2004-2006; vice president of operations, CT Corsearch, 2000-2004 ... Vice president of site operations, MemberWorks, 2000 ... Vice president of production services, RIA, Thomson Tax & Accounting, 1996-2000.

**Other Affiliations:** Past board member, American Association of Publishers ... Board, International DOI Foundation ... Publishing member, CrossRef.

**Education:** George Washington University, BA.



### Joe Adams Managing partner and CEO, McGladrey

Under Adams, McGladrey is moving forward on a number of fronts, from a string of strategic mergers and a new career development framework that lets staff know exactly where they stand in their working life, to a major rebranding that will see the firm identified as "RSM US" in October.

**Career Highlights:** Managing partner and chief executive officer, RSM McGladrey, 2011-present; leader, Great Lakes Region, 2008-2011; executive managing director, Great Lakes Economic Unit, 1998-2008; audit partner, 1987; joined, 1979.

**Other Affiliations:** American Institute of CPAs ... Illinois CPA Society ... Governing Board, Center for Audit Quality ... Major Firms Group ... Economic Club of Chicago.

**Education:** DePaul University, MBA Operations Management; BA Accounting.

**Personal:** Born 1955, Chicago ... Married to Cheryl ... Five children, four grandchildren.



### Sam Allred Director, Upstream Academy

Allred has been teaching accounting firm leaders how to grow their businesses for decades — and now he's helping them ensure the future of the profession by training the next generation through his Emerging Leaders Academy.

**Career Highlights:** Director, Upstream Academy, 2012-present ... Shareholder, Anderson ZurMuehlen, 1990-2012 ... Owner, Elypsis, 1987-1990 ... Consultant, Main Hurdman, 1984-1987.

**Other Affiliations:** Boy Scouts of America ... LDS leadership.

**Education:** Brigham Young University, 1984, BS Accounting.

**Personal:** Born 1959, Fresno, Calif. ... Married to Marlene ... Seven children.



### John Ams Executive vice president, NSA

With so many issues — from Obamacare and uncertain tax regs to changes in demographics and technology — acting as sources of complication and confusion for tax practitioners and accountants, Ams and his organization are an important source of clarity and certainty.

**Career Highlights:** Executive vice president, National Society of Accountants, 2001-present ... Senior vice president of financial affairs, Interstate Natural Gas Association, 1984-2001 ... Director of federal tax programs, National Association of Realtors, 1979-1983 ... Attorney, National Office, Internal Revenue Service, 1975-1979.

**Other Affiliations:** Internal Revenue Service Advisory Council, 2012-2014; chair, Office of Professional Responsibility Subgroup, 2014 ... American Society of Association Executives ... American Bar Association ... D.C. Bar Association ... Phi Beta Kappa ... Past or present board member, Cherian Investments, NSA Scholarship Foundation, Northern Virginia Relay for Life.

**Education:** Georgetown University Law Center, 1975, JD ... Michigan State University, 1972, BA.

**Personal:** Born 1950, Inst, Austria ... Married to Nancy ... Three children.

**Twitter/Blog:** @NSATax / <http://connect.nsacct.org/NSABlog/>



### August Aquila President & CEO, Aquila Global Advisors

Aquila continues to offer guidance to his wide-ranging clientele of accountants, sharing his expertise in compensation plans, M&A and partnership issues through consulting, public speaking, and his writing, including two new books on growth that are due out later this year.

**Career Highlights:** President, Aquila Global Advisors LLC, 1995-present ... Director of practice management consulting, The Growth Partnership, 2003-2005 ... Vice president of mergers and acquisitions, American Express Tax & Business Services, 1996-2003; vice president of field management, 1994-1996 ... Senior vice president, Practice Development Institute, 1987-1994 ... Partner, Friedman, Eisenstein, Raemer & Schwartz, CPAs 1985-1994 ... Adjunct professor of marketing, DePaul University Graduate School of Business, 1980-1994 ... Group Director of marketing, Coopers & Lybrand (Chicago Group), 1979-1983.

**Other Affiliations:** Founding board member, Hall of Fame member, Association for Accounting Marketing ... Founder and editor, *Partner to Partner*, 1995-2000 ... Founder and editor, *Partner Advantage*, 2003-2006 ... Author, *CPA Firm Merger Strategies That Work*; *CPAs That Sell*; *Breaking the Paradigm: New Approaches to Pricing Accounting Services*; *Client at the*

*Core: Marketing and Managing Today's Professional Services Firm; Compensation as a Strategic Asset ... Contributing author, The Marketing Advantage; How to Hire a Marketing Director and Make it Work; Bull's Eye! The Ultimate How-To Marketing & Sales Guide for CPAs ... Board member, Anchor Bank NA and Anchor Bank Holding Co. ... AICPA.*

**Education:** Indiana University, PhD ... DePaul University, MBA, BA.

**Personal:** Born 1946, Chicago ... Married to Emily Haliziv ... One daughter.

**Twitter:** @aquilaadvisors



### Erik Asgeirsson CEO, CPA.com

Asgeirsson and his growing team at CPA.com are cloud evangelists *par excellence*, spreading the word to the accounting profession through enthusiastic education, even as they continue to add to the host of resources they make available online.

**Career Highlights:** CEO, CPA.com, 2002-present; vice president of professional services, 2000-2002 ... To sales director, Business Services Division, AT&T, 1990-2000.

**Other Affiliations:** Board member, CPA.com ... DigitalNow Advisory Group ... Former Peace Corps volunteer in Tanzania.

**Education:** Stern School of Business, New York University, New York, MBA ... George Washington University, Washington, D.C., BS Electrical Engineering.

**Personal:** Born 1968, Falmouth, Mass. ... Married to Claudia ... Four daughters.

**Twitter:** @erikasgeirsson



### Kim Austin Business development manager, national accounts, Intuit

Austin is one of Intuit's most visible proponents of the cloud to the profession, but her influence is felt beyond that — in her work



to help the Information Technology Alliance draw in more young members, for instance, and her readiness to teach anyone and everyone about social media.

**Career Highlights:** Business development manager, national accounts, Intuit, 2014-present ... Director of West Coast operations, XCM Solutions/Xpitax, 2012-2013 ... Business development manager, Fujitsu Computer Products of America, 2009-2012 ... Channel development manager to business development manager, Altec Products Inc., 2007-2009 ... To regional sales manager, LibertyIMS (now Hyland Software), 2004-2007.

**Other Affiliations:** Chair, Young Leaders Committee, Information Technology Alliance; social liaison, Communications Committee ... CORE Leadership Team, Intuit Women's Network ... Member, SBG #QBEExpert Team, Intuit.

**Education:** Chapman University, Orange, Calif., 2004, BSBA with Marketing emphasis.

**Personal:** Born 1983, Fullerton, Calif. ... Married to Brian.

**Blog/Twitter:** View from My Shoes (www.viewfrom-myshoes.com) / @Kintuitive



## Ron Baker Founder, VeraSage Institute

Baker's influence only continues to grow, as accounting firms of all sizes and thought leaders from around the profession are beginning to catch up to his thinking on value pricing and knowledge work.

**Career Highlights:** Founder, VeraSage Institute, 1998-present ... Instructor, California CPA Education Foundation, 1995-present ... Partner, Baker & Barnett CPAs, 1987-2003 ... Senior accountant, KPMG, 1984-1987.

**Other Affiliations:** Radio host, "The Soul of Enterprise: Business in the Knowledge Economy," VoiceAmerica.com ... California Society of CPAs ... Group of 100, American Institute of CPAs ... Author, *The Soul of Enterprise: Dialogues on Business in the Knowledge Economy*; *Implementing Value Pricing: A Radical Business Model for Professional Firms*; *Mind Over Matter*; *Pricing on Purpose*; *Measure What Matters to Customers*; *Professional's Guide to Value Pricing*, 6th Ed.; *The Firm of the Future*; *Burying the Billable Hour*; *Trashing the Timesheet*; *You Are Your Customer List* ... Faculty member, Professional Pricing Society ... Cato Institute ... Heritage Foundation ... American Enterprise Institute ... Hoover Institution ... Foundation for Economic Education ... Discovery Institute ... Competitive Enterprise Institute.

**Education:** Professional Pricing Society, Atlanta, 2002, postgraduate ... University of Chicago GSB, 2001, postgraduate ... Cato University, Washington, 2000, postgraduate ... Disney University, 1997, postgraduate ... San Francisco State University, 1984, BS Accounting ... Santa Rosa Junior College, 1982, AA.

**Personal:** Born 1962, Santa Rosa, Calif. ... Single.

**Blogs/Twitter:** www.verasage.com/www.the-soulofenterprise.com/@ronalbaker; LinkedIn Influencer



## Jon Baron Managing director, Professional Segment, Thomson Reuters Tax

## & Accounting

Baron applies a keen eye for what both the clients and the accountants of the future will want to the tools his company creates.

**Career Highlights:** Managing director, Professional Segment, Thomson Reuters Tax & Accounting, 2011-present; president-Americas, Workflow & Service Solutions, 2010-2011; president, Thomson Reuters Tax & Accounting, Professional Software & Services, 2005-2009; executive vice president, accounting market, and president and CEO, Creative Solutions, 2004-2005; president and CEO, Thomson Reuters/Creative Solutions, 1998-2004; vice president of product development, 1992-1998 ... Vice president of product development, national customer training and Western regional support, CCH, 1980-1992

**Education:** Boston University, 1982, MBA ... Siena College, 1974, BBA Accounting

**Personal:** Born 1952, Colchester, Vt. ... Married to Betsy ... Four children.



## Joanne Barry Executive director and CEO, NYSSCPA

Barry's state society, one of the largest in the nation, has been active in its advocacy of the issues that matter to its members, and in making sure it has members in the future, through its NextGen conference and other initiatives to reach young accountants.

**Career Highlights:** Executive director and CEO, New York State Society of CPAs, 2010-present; executive director, Foundation for Accounting Education, 2010-present; publisher, *The CPA Journal*; deputy executive director, 2008-2009; managing director of communications, 2006-2008; director, Communications Division, 1986-1989; assistant director of public relations, 1981-1986 ... Assistant director of public information and publications editor, Hackensack Medical Center, 1980-1981 ... Public relations assistant, public relations coordinator, New York City School Volunteer Program, 1977-1981.

**Other Affiliations:** American Society of Association Executives ... Secretary/treasurer, CPA Society Executives Association ... Board, Montclair State University Accounting, Law and Taxation Advisory Board ... St. John University's Peter J. Tobin College of Business, Department of Accounting and Taxation Executive Advisory Board; Accountants Forum Board of Directors ... Board, New York Society of Association Executives ... Board, New York Chapter, International Association of Business Communicators ... Past national chair, AICPA Public Relations Conference ... Public Relations Society of America ... National Press Club ... Magazine Publishers of America.

**Education:** New School for Social Research, New York, MS ... Montclair State University, Upper Montclair, New Jersey, BA.

**Personal:** Born in Jersey City, N.J. ... Married to Edward ... Three sons



## Lyle Benson Chair, PFP Executive Committee, AICPA

Benson and the PFP Executive Committee he chairs are bringing high-level thought leadership to financial planning,

highlighting major issues planners need to be aware of, while also positioning the field as a way to draw more young people into accounting — and keep them.

**Career Highlights:** President and founder, L.K. Benson & Co. ... Manager/partner, Coyne & McLean, 1984-1994 ... Staff, McLean Kohler CPA, 1980-1984.

**Other Affiliations:** Chair, PFP Executive Committee, AICPA ... Advisory Board, *CCH Estate & PFP Journal* ... Founder and chair, Athena Study Group.

**Education:** University of Baltimore, 1984, MS Tax ... Loyola University, 1980, BS Accounting.

**Personal:** Born 1958, Baltimore ... Married to Ellen ... Three children



## David Bergstein Strategic account manager, Accountant & Advisory Group, Intuit

Given his long history as both a practitioner and working for technology companies, Bergstein is perfectly positioned to explain the ins and outs, and the pros and cons, of new technology to other practitioners, which he does through a busy speaking schedule and his many blog posts.

**Career Highlights:** Strategic account manager, Accountant & Advisory Group, Intuit, 2013-present ... Owner, A David Bergstein CPA, 1976-present ... Director of strategic relationships, 2009-2013, Wolters Kluwer Tax & Accounting; business development manager, consumer products, 2004-2009; manager of tax workflow specialists, 2007; joined, 2006 ... Vice president of sales and marketing, AccTrak21, 2003 ... Manager of key accounts, Thomson Tax & Accounting/PPC, 2002-2003 ... Regional manager, channel solutions marketing, CPA2Biz, 2001-2002 ... Vice president of sales and business development, AccountantsWorld, 1999-2001; director of sales & marketing, 1988-1989 ... Director of sales, Thomson Financial/CLR Fast Tax, 1992-1999; regional sales manager, 1984-1987; joined, 1980 ... Chief of technical section, 1975-1976, Internal Revenue Service; revenue agent, 1970-1975 ... Accountant, Miller & Co. CPAs, 1967-1971.

**Other Affiliations:** Adjunct instructor, Broward College ... AICPA ... Florida Institute of CPAs ... National Association of Tax Professionals ... Past instructor, IRS VITA program ... Past treasurer, HOA ... Director of academic affairs, professor of accounting, International College of Naples, 1989-1991 ... Assistant professor of accounting, Suffolk County Community College, 1976-1980 ... Former staff sergeant, U.S. Army Reserve.

**Education:** CW Post College, 1978, MST ... City College of New York, Baruch School, 1968, BBA.

**Personal:** Born 1947, Brooklyn, N.Y. ... Two children, two grandchildren.

**Blog/Twitter:** www.taxmaven.com, @davidbergstein



## Wayne Berson CEO, BDO USA

Through a well-orchestrated and sustained series of high-profile mergers, Berson is on track to make BDO only the seventh firm in the country with

over a billion dollars in annual revenue.

**Career Highlights:** CEO, BDO USA LLP, 2012-present; chairman, Global Board, BDO International, 2014-present; board member, BDO International, 2012-present; U.S. board chairman; regional managing partner for assurance; office managing partner, assurance; joined BDO, 2001 ... Managing partner, Lang Group; partner; audit manager; joined, 1991 ... Audit senior to supervisor, Grant Thornton, 1987-1991 ... Audit staff to supervisor, Mazars (South Africa), 1983-1987.

**Other Affiliations:** Co-founder, BDO Institute for Nonprofit Excellence ... Past member, PCPS Executive Committee, AICPA ... Past president, Greater Washington Society of CPAs ... Board member, Greater Washington Board of Trade ... Board member and Audit Committee chair, Global Alliance for Vaccinations and Immunizations ... Trustee, Federal City Council.

**Education:** University of South Africa, 1986, Accounting Science ... University of Cape Town, 1983.

**Personal:** Born 1961, Cape Town, South Africa ... Married to Sandra-Lynn ... Three children.



## Chandra Bhansali President, AccountantsWorld

One of the original pioneers of the cloud, Dr. Bhansali remains one of its most passionate proponents, ever-ready to explain how it will transform your accounting practice.

**Career Highlights:** CEO and co-founder, AccountantsWorld, 1999-present ... President and co-founder, Micro Vision Software Inc., 1986-2002 ... Manager, Perkin Elmer, 1980-1985.

**Other Affiliations:** CEO Club ... Will & Vision Foundation, IEEE ... ACM ... World Spiritual Awareness Forum.

**Education:** SUNY Buffalo, 1979, Ph.D. ... Indian Institute of Science, 1970, MS ... MBM Engineering College, 1968, BE.

**Personal:** Born 1947, Jodhpur, India ... Married to Sharada (co-founder of AccountantsWorld) ... Two children.

**Blog/Twitter:** http://community.accountantsworld.com / @powerpractice



## Sharada Bhansali Executive vice president and co-founder, AccountantsWorld

Bhansali is the behind-the-scenes powerhouse whose leadership on the software development front has helped make AccountantsWorld one of the pioneers in the ongoing move to the cloud.

**Career Highlights:** Executive vice president and co-founder, AccountantsWorld, 2000-present; EVP and co-founder, MicroVision (predecessor company), 1984-2000.

**Other Affiliations:** Director, Will & Vision Foundation.

**Education:** University of Buffalo, 1978, MS Eng.; 1977, MS Math ... Fergusson College, Pune, India, 1970, BSc.

**Personal:** Born 1951, Jodhpur, India ... Married to Chandra ... Two children.



### Ken Bishop President and CEO, NASBA

Besides diligently serving the needs of his constituents at the nation's state boards of accountancy, Bishop is also helping spread the CPA Exam around the world, and prepping for its next iteration, in 2017.

**Career Highlights:** Career Highlights: President and CEO, National Association of State Boards of Accountancy, 2012-present; Executive Vice President, COO, 2010-2011; Senior VP and Director, 2007-2010 ... President, CEO, Professional Credential Services, 2007-2010 (former wholly-owned subsidiary of NASBA) ... Executive Director, Missouri State Board of Accountancy, 1998-2006 ... Law enforcement career, Commander, Chief of Police, Under-Sheriff.

**Other Affiliations:** CEO, NASBA Center for the Public Trust ... Past member, Board of Examiners, American Institute of CPAs.

**Education:** Kennedy School of Government, Harvard University, Executive Program ... University of Missouri, Master's in Criminal Justice; Bachelor's in Education ... Federal Criminal Justice Academy ... Missouri State Highway Patrol Academy.

**Blog:** Monthly "President's Memo" in State Board Report, on [www.nasba.org](http://www.nasba.org).



### Jason Blumer Founder and CEO, Thriveal Network

The very model of a modern managing partner (or chief innovation officer, as he prefers to be called), Blumer and his Thriveal Network are extremely busy sharing bold new ideas of how accounting firms can look, act, and serve both clients and themselves.

**Career Highlights:** Chief innovation officer, Blumer & Associates CPAs PC ... Audit manager, Burkett, Burkett & Burkett CPAs, 1998-2003 ... Controller, Abbott Enterprises Inc., 1996-1998 ... Market financial manager, BrightStar Studios, 1993-1996.

**Other Affiliations:** Founder and CEO, Thriveal CPA Network ... Host, "The Businessology Show" ... AICPA ... South Carolina Association of CPAs.

**Education:** Wofford College, Spartanburg, S.C., 1993, Bachelor's Acctg.

**Personal:** Born 1971, Greenville, S.C. ... Married to Jennifer ... Three daughters.

**Blog/Twitter:** [www.blumercpas.com/blog](http://www.blumercpas.com/blog) / [www.thriveal.com/blog/](http://www.thriveal.com/blog/) / @jasonmblumer



### Gary Bolinger President and CEO, Indiana CPA Society

Bolinger is one of those at the forefront of the move toward competency-based learning, which will radically change the way accountants approach professional education, and his CPA Center of Excellence is a model for new ways to help prepare CPAs for the future.

**Career Highlights:** President and chief executive officer, Indiana CPA Society, 1999-present; execu-

utive director, 1990-1999; field activities director, 1984-1989 ... Band director, Terre Haute North High School, 1979-1984 ... Coordinator, Selmer, 1978-1979 ... Band director, Western Boone High School, 1976-1978.

**Other Affiliations:** American Society of Association Executives ... Past president, Indiana Society of Association Executives ... Advisory Council, Indiana State University Accounting Department ... Past member, Strategic Planning Committee, AICPA; past member, Peer Review Board, State Legislative Committee ... Institute for Organization Management.

**Education:** Indiana State University, Terre Haute, 1981, MA; 1975, BS.

**Personal:** Born 1952, South Bend, Ind. ... Married to Martha ... One daughter.

**Blog:** "I was just thinkin'" <http://incpas.org>



### Gary Boomer CEO, Boomer Consulting

Boomer has developed a way of thinking about technology and firm management that will lead accountants to greater growth and better-performing firms. Now it's just a matter of the rest of the profession catching up.

**Career Highlights:** Chief executive officer, Boomer Consulting Inc., 1996-present ... To 1996, Partner, Varney & Associates.

**Other Affiliations:** AICPA Council and Life Insurance/Disability Plans Committee; past member, Advisory Panel, CPA Horizons 2025 ... Accounting Advisory Board, Kansas State University ... The Advisory Board ... Co-founder, Winning Is Everything Conference ... Past president, Kansas Society of CPAs Author, *Performance3*; *The Boomer Advantage Guides*; *Boomer Bulletin* ... Past chair, Manhattan Chamber of Commerce ... Sulgrave Regency Board.

**Education:** Kansas State University, BS and MS Acctg.

**Personal:** Married to Mary ... Three children.

**Blog/Twitter:** [www.thinkplangrow.net/](http://www.thinkplangrow.net/) / @lgboomer



### Jim Boomer CIO and shareholder, Boomer Consulting

When he's not busy sharing his expertise as a technology and management consultant with his clients and the lucky firms in the "Boomer Circles," Jim is a frequent speaker, and this year served as chair of the AICPA's Tech+ Conference, one of the biggest events in accounting technology.

**Career Highlights:** Chief information officer and shareholder, Boomer Consulting, 2006-present ... Consultant, BearingPoint, 2002-2004 ... To senior consultant, Arthur Andersen Business Consulting, 1999-2002.

**Other Affiliations:** AICPA; chair, Conference Steering Committee, AICPA Tech+ ... Executive Committee, Board of Directors, Kansas Society of CPAs.

**Education:** University of Texas at Austin, 2006, MBA Marketing/Entrepreneurship ... Kansas State University, 1999, BS Accounting/MIS.

**Personal:** Born 1976, Manhattan, Kan. ... Married to Mary ... One son and one daughter.

**Blog/Twitter:** [www.thinkplangrow.net/](http://www.thinkplangrow.net/) / @jimboomer



### Jim Bourke Partner, WithumSmith+Brown

Holding a full-time job as a practicing partner and tech leader for a cutting-edge Top 100 Firm would be challenging enough for any normal person, but Bourke adds a punishing schedule of traveling, speaking, writing and otherwise sharing all the valuable practical insights he's gleaned with the rest of the profession.

**Career Highlights:** Partner, Firm Management Committee, partner-in-charge of firm technology, and technology niche practice leader, Withum-Smith+Brown; joined, 1987.

**Other Affiliations:** Past president, New Jersey Society of CPAs ... Past member, Board of Directors and Council, AICPA; past chair, CTPP Credential Committee; past chair, AICPA Tech+ Conference ... Board member, N.J. Technology Council.

**Education:** Kean University, 1987, BS Acctg.

**Personal:** Born 1964, Jersey City, N.J. ... Married to Jody ... Three children.

**Twitter:** @JimBourke



### Paul Caron Publisher and editor-in-chief, TaxProf Blog

In the years since Caron was one of the few pioneering tax bloggers, a veritable host of others have sprung up, but none can match his authority, his comprehensive approach, or his willingness to doggedly, persistently pursue the long-term unfolding of the scandal around the IRS's targeting of conservative groups.

**Career Highlights:** Associate dean for research and professor of law, Pepperdine University School of Law, 2013-present; ... Summer visiting professor, University of San Diego School of Law, 2001-2014; ... Professor, University of Cincinnati College of Law, 1990-2013 ... Associate, Tax Department, Sullivan & Worcester, 1985-1990 ... Law clerk, Chief Judge William Holloway, U.S. Court of Appeals for the Tenth Circuit, 1983-1985.

**Other Affiliations:** Owner and publisher, Law Professor Blogs Network ... Series Editor, *Graduate Tax Series*; *Law Stories* ... Author, *Tax Stories*; *Federal Wealth Transfer Taxation*; *Federal Income Tax Anthology*.

**Education:** Boston University, 1988, LL.M. (Tax) ... Cornell Law School, 1983, J.D. ... Georgetown University, 1979, AB.

**Twitter/Blog:** @SoCalTaxProf <http://taxprof.typepad.com>



### Belicia Cespedes Accounting prodigy

Being one of youngest people to pass the CPA Exam (at 17!) is wildly impressive — as is the way Cespedes has leapt wholeheartedly into being a CPA, proving her dedication to service at a number of professional organizations. But what really earned her a spot among the T100 is

the way she embodies precisely the kind of young accountant the profession so desperately needs to attract to ensure its future — smart, passionate and deeply engaged in the path she has chosen.

**Career Highlights:** Accountant, International Environmental Corp., 2014-present; accounting intern, 2011-2014 ... Anthony Bonefant and Co., staff accountant, 2014-present; intern, 2012-2014 ... Bookkeeper, American Home Investors, 2007-2010 ... Treasurer, I Love to Serve, 2006-2007.

**Other Affiliations:** Accounting and Financial Women's Alliance ... CalCPA ... AICPA ... National treasurer, American Woman's Society of CPAs ... Association of Latino Professionals for America ... Santa Clarita Master Chorale ... Placerita Bible Church ... Ministerio Evangelismo de las Americas ... Santa Clarita Valley Food Pantry ... Santa Clarita Valley Homeless Shelter.

**Education:** California State University of Northridge, MSA (in progress) ... Thomas Edison State College, 2013, BSBA Accounting.

**Personal:** Born 1997, Panorama, Calif.



### Richard Chambers President and CEO, IIA

As the chief representative of a growing membership of internal auditors worldwide, Chambers is constantly busy expanding the resources and reach of their organization, as with the institute's recent merger with the Auditing Roundtable.

**Career Highlights:** President and CEO, Institute of Internal Auditors, 2009-present ... National practice leader, internal audit advisory services, PwC, 2004-2008 ... Vice president, IIA Learning Center and Research Foundation, 2001-2004 ... Inspector general, Tennessee Valley Authority Corp., 2000-2001 ... Deputy inspector general, U.S. Postal Service, 1998-2000 ... Chief of internal review, U.S. Army, 1988-1998 ... Adjunct instructor, Clayton College and State University, 1980-1988 ... Senior operations research analyst, Ft. McPherson, Ga., 1984-1988 ... Senior auditor, FORSCOM Internal Review Office, Atlanta 1981-1984; 1976-1980 ... Accountant, Atlanta Health and Human Services, 1980-1981 ... Accountant, U.S. General Accounting Office, 1976 ... Internal auditor, Trust Company Bank, 1975

**Other Affiliations:** Member, COSO Board ... Board, International Integrated Reporting Council ... Blue Ribbon Committee for Audit Effectiveness ... NACD ... Association of Certified Fraud Examiners ... Past member, U.S. President's Council on Integrity and Efficiency ... Past member and chairman, City of Orlando Audit Board.

**Education:** Salve Regina University, 1994, MA International Relations ... U.S. Army War College, 1991-1992 ... Georgia State University, 1978, MBA Management; 1975, BBA Accounting.

**Personal:** Born 1954, Fort McClellan, Ala. ... Married to Kim ... Three daughters

**Blog / Twitter:** "Chambers on the Profession" [www.theia.org/blogs/chambers/](http://www.theia.org/blogs/chambers/) / @RFChambers



### Fayeul Choudhury CEO, IFAC

In a profession that is often balkanized by national and local



regulatory and licensing regimes, Choudhury and his organization are strong voices for the universal interests — and value — of accountants.

**Career Highlights:** CEO, International Federation of Accountants, New York, 2012-present ... Vice president, corporate finance and risk management, World Bank Group; controller and VP, strategic resources management, 2005-2008; VP and controller, 2000-2005; various staff and management positions ... Price Waterhouse, 1974-1985.

**Other Affiliations:** Audit Committee, United Nations Development Program ... Governance and Nominating Committee, International Integrated Reporting Council ... Past member, Iraq Advisory and Monitoring Board ... Public Interest Oversight Board ... Standards Advisory Council, IASB ... Past chair, Global Steering Committee, International Forum for Accountability Development ... Treasurer, Partnership for Transparency Fund ... Past trustee and chair of Audit Committee, World Learning.

**Education:** Jesus College, Oxford, 1974, MA Engineering Science and Economics.

**Personal:** Born, 1954, Dhaka, Bangladesh ... Married to Yasmin ... Two children.



### Tim Christen

Incoming chair, AICPA

Besides being the widely admired head of a very successful

Top 20 firm, Christen is stepping up this year as volunteer chair of the institute, bringing a long history of service to the profession.

**Career Highlights:** Chairman and CEO, Baker Tilly Virchow Krause; to managing partner, Virchow Krause & Co., 1990-1999; accountant, 1980-1986 ... CFO, Ewald Automotive Group, 1986-1988.

**Other Affiliations:** Incoming chair, AICPA; past chair, Major Firms Group; past member, Compensation and Political Action Committees ... Board, Baker Tilly International; chair, BTI Remuneration Committee ... Board, Lyric Opera of Chicago; Chicago Civic Federation ... Economic Club of Chicago ... Chicago Club ... Madison Club ... Chicago United Way Tocqueville Committee.

**Education:** University of Wisconsin, Platteville, 1981, BS Accounting.

**Personal:** Born 1958, Darlington, Wis. ... Married to Pam ... Four children.

**Twitter:** @timchristenpca



### David Cieslak

Principal, Arxis Technology

While Cieslak is one of the foremost educators on all the things accountants need to know about technology, his expertise in IT security is particularly in demand at a time when the vast amount of client information in the profession's hands

seems more at risk than ever.

**Career Highlights:** Principal, Arxis Technology, 1994-present ... Partner, Cieslak, Boynton & Speakman, CPAs, 1985-1994 ... Financial analyst, Associated Financial Corp., 1984-1985 ... Senior accountant, PwC, 1982-1984.

**Other Affiliations:** Chair, Sage Business Partner Advisory Council ... Past chair, AICPA IT Executive Committee ... Past Board member, Information Technology Alliance ... Council, CalCPA ... Past president, California CPA Education Foundation, 2000-2001 ... Member and past chair, CalCPA State Technology Committee ... Associate instructor, K2 Enterprises.

**Education:** University of California, Los Angeles, 1982, BA Economics.

**Personal:** Born 1959, Binghamton, N.Y. ... Married to Michelle ... Two children.

**Twitter:** @dcieslak



### Gale Crosley

President, Crosley+Co.

One of the leading consultants to the profession, Crosley is boosting growth rates at firms everywhere with forward-thinking strategies and on-point advice.

**Career Highlights:** Founder and president, Crosley+Co., 2001-present ... Executive vice president of sales and marketing, AnswerThink Consulting Group, 1998-2000 ... Founder and President, Syn-

chrony Networks, 1995-1998 ... Vice president of marketing, VoiceCom Systems, 1994-1995 ... Director of marketing and senior director of sales, MCI, 1989-1994 ... Independent consultant, 1987-1989 ... Sales rep, product manager, sales manager, marketing manager, IBM, 1975-1987 ... Staff auditor, Price Waterhouse, 1973-1975 ... Staff auditor, Arthur Andersen, 1972-1973.

**Other Affiliations:** Advisory Board, *Journal of Accountancy* ... AICPA ... Georgia Society of CPAs ... Ohio Society of CPAs ... Author, *At the Crossroads*.

**Education:** University of Akron, 1972, BS Acctg.

**Personal:** Born 1951, Cleveland ... Married to Steven ... Four children.

**Twitter:** @grocrosley



### Loretta Doon

CEO, CalCPA

With Doon at the helm, the California society is boosting its membership and increasing the percentage of newly licensed CPAs who join up, while also making a concerted effort to reach out to young accountants, with student ambassadors on almost 40 campuses.

**Career Highlights:** CEO, California Society of CPAs and California CPA Education Foundation, 2006-present; chief operating officer, 2005-2006 ... Associate executive director, California Teachers As-

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sociation, 1979-2005 ... Auditor, Ernst & Young, 1976-1979 ... Controller, North American Reassurance Life Service Co., 1974-1976.

**Other Affiliations:** Past president, CPA-SEA ... Past member, Executive Committee, PCPS, AICPA; past member, Council ... American Woman's Society of CPAs ... Financial Women of San Francisco ... Professional Business Women of California ... National Association of Corporate Directors ... Member and mentor, Ascend ... Board, ACAP Northern California ... Advisory Board, Center for Financial Reporting and Management, Haas School of Business, UC Berkeley ... Advisory Board, Charles W. Lamden School of Accountancy at San Diego State University ... Menlo College Advisory Board ... Past president, California CPA Education Foundation ... Former commissioner, California State Lottery.

**Education:** San Francisco State University, Master of Arts in Education ... University of Hawaii, Honolulu, Bachelor of Arts.



### James Doty Chairman, PCAOB

Doty has been known to wear cowboy boots to work, but he's no cowboy: Instead, he's a dedicated and effective proponent of the role of the audit in public markets — and of the integrity on the part of the auditors that that role requires. **Career Highlights:** Chairman, Public Company Accounting Oversight Board, 2011-present ... Partner, Baker Botts, 1992-2011; joined 1969 ... General counsel, SEC, 1990-1992.

**Other Affiliations:** American Law Institute ... American Bar Association ... State Bar of Texas ... Houston Bar Association.

**Education:** Yale Law School, 1969, LLB ... Harvard University, MA History ... Oxford University, 1964, AB (Rhodes Scholar) ... Rice University, 1962, BA History.

**Personal:** Born in Houston ... Three grandchildren.



### Lynne Doughtie Chairman and CEO, KPMG

Deloitte's Cathy Engelbert may have been the first woman to helm a Big Four firm by a month or so, but Doughtie's ascension broke an equally important barrier: With 50 percent women, the club of Big Four leaders now more closely reflects our species' gender demographics than almost any other level of the accounting profession.

**Career Highlights:** Chairman and CEO, KPMG, 2015-present; vice chair — Advisory, 2011-2015; national managing partner, Advisory, 2005-2011; professional practice partner, Mid-Atlantic, 2003-2005; information risk management partner-in-charge, Mid-Atlantic, 2002-2005; partner, 1998; assistant accountant, 1985.

**Other Affiliations:** Governing Board, Center for Audit Quality ... Chair, Advisory Board, Pamplin College of Business, Virginia Tech ... AICPA ... Committee of 200.

**Education:** Virginia Tech, 1985, BS Accounting.

**Personal:** Born 1962, Richmond, Va. ... Married to Ben ... Two children.



### Cathy Engelbert CEO, Deloitte

It's an interesting coincidence that Engelbert should appear right next to rival Big Four CEO Lynne Doughtie, since the two of them together shattered what was probably the thickest, toughest glass ceiling in all of accounting.

**Career Highlights:** CEO, Deloitte, 2015-present; CEO, Deloitte & Touche LLP, 2014-2015; national MP — regions, 2012-2014; Deloitte LLP board of directors, 2011-2014; quality risk manager for financial accounting and valuation securitization, Deloitte & Touche, 2009-2010; deputy national professional practice director, East Region, 2007-2014; Deloitte LLP Board Council, 2005-2006; SME on financial instruments, credit, fair value and hedging strategies, 1998-2002; partner, 1998; staff auditor, 1986.

**Other Affiliations:** Governing Board, Center for Audit Quality ... Accounting Advisory Board, Lehigh University ... AICPA ... New Jersey Society of CPAs ... Past member, FASAC.

**Education:** Lehigh University, 1986, BS Accounting. **Personal:** Born 1964, Collingswood, N.J. ... Married ... Two children.



### George Farrah Editorial director, tax and accounting, Bloomberg BNA

Farrah has his finger on the pulse of all things tax — from the latest last-minute extender to the hidden trends in sales tax — and the information and insights his team puts out are invaluable.

**Career Highlights:** Editorial director, Tax and Accounting, Bloomberg BNA, 1988-present ... Tax accountant, Primark Corp., 1986-1988 ... Tax manager, Banner Life Insurance, 1985-1986 ... Tax accountant, Aetna Life & Casualty, 1981-1985 ... Staff accountant, Cohen Rosenfeld & Lieberman, 1979-1981.

**Other Affiliations:** AICPA.

**Education:** Georgetown University, 1989, MST ... University of Connecticut, 1979, BS Acctg.

**Personal:** Born in Norwich, Conn.



### Lewis Ferguson Board member, PCAOB

Recently appointed to a second term with the board, Ferguson also plays a prominent international role through his work with a group of global audit regulators.

**Career Highlights:** Board member, Public Company Accounting Oversight Board, 2011-present; general counsel, 2004-2007 ... Partner, Gibson Dunn & Crutcher, 2007-2011 ... Partner, Williams & Connolly, 1998-2004, 1979-1994 ... Senior vice president, general counsel and director, Wright Medical Technology, 1994-1998.

**Other Affiliations:** Chair, Global Public Policy Committee Working Group, International Forum of Independent Audit Regulators, 2015-present; chair, 2013-2015.

**Education:** Yale, 1969, LLB ... Harvard Law School, JD ... Cambridge University, MA ... Yale College, BA.

**Personal:** One child.



### Cindy Fornelli Executive director, CAQ

Fornelli is dedicated to her mission to improve audits and their perceived value in the markets, and as part of that she has built strong networks that not only promote leadership in the field, but also empower women in the profession.

**Career Highlights:** Executive director, Center for Audit Quality, 2006-present ... Regulatory and conflicts management executive, Bank of America, 2004-2006 ... Deputy director, Division of Investment Management, Securities and Exchange Commission, 1999-2004 ... Senior associate, Dechert, 1996-1999 ... Fried, Frank, Harris, Shriver & Jacobson, 1991-1996.

**Other Affiliations:** Washington, D.C., Bar ... American Bar Association ... Member, Financial Accounting Standards Advisory Council ... Advisory Board, the Ira M. Millstein Center for Global Markets and Corporate Ownership ... National Association of Corporate Directors' 2010 Blue Ribbon Commission on the Audit Committee ... National Association of Corporate Directors' 2009 Blue Ribbon Commission on Risk Governance ... Board of Trustees, Class of 2014, SEC Historical Society. Board of Directors, Washington Literacy Center.

**Education:** National Law Center, George Washington University, JD, 1991 ... Purdue University, 1985, BA.

**Personal:** Born 1960, Los Angeles.

**Twitter:** @cfornelli



### Jeanette Franzel Board member, PCAOB

Board doesn't just deliver the board's message to even the most disgruntled of stakeholders — she's also a powerful advocate at the highest level for diversity in the profession.

**Career Highlights:** Member, Public Company Accounting Oversight Board, 2012-present ... Managing director, Government Accountability Office, 2009-2012; rejoined, 1991; joined, 1986 ... Public accounting practice, 1988-1991 ... Elementary and high school teacher, South America.

**Other Affiliations:** Past chair, Government Performance and Accountability Committee, AICPA ... Institute of Internal Auditors ... Association of Government Accountants ... Institute of Management Accountants.

**Education:** Senior Executive Fellows program, Harvard University ... George Mason University, MBA ... College of St. Teresa, BA Accounting and Spanish.

**Personal:** Two daughters, recently launched.



### J. Russell George Treasury Inspector General for Tax Administration

As always, George is one of the hardest working people in the profession, generating countless reports assessing the performance of the IRS — and recently, shedding valuable light on the scandal over the targeting of conservative groups that has plagued the service over the past two years. **Career Highlights:** Treasury Inspector General for

# Q&A

## Accounting's biggest issues

*As always, we asked the Top 100 what they thought were the most important issues facing the profession. Highlights of their answers — thought-provoking, insightful, sometimes controversial — are given below.*

Evolving the profession at the pace of change we see in the business world is by far the most important task before us. ... We must embrace innovation, find a way to elevate the trusted business advisor relationship with clients and employers, and evolve to meet and anticipate market demands. — *Barry Melancon*

The most important issue facing the accounting profession today is our inability or unwillingness to accept and embrace change. — *Sandy Johnson*

The profession is changing; and is faced with disruption on multiple fronts, but instead of engaging the opportunities that come with them, it's almost as if the profession is waiting for directions. News flash: We're not going to get any. — *Joanne Barry*

Complacency has always been and still remains the biggest challenge for accountants. — *Chandra Bhansali*

Relevance. In our increasingly digital, instant-information world, how can a profession comprised of predominantly compliance-oriented, historically minded traditionalists compete? And why would young, smart, tech-savvy professionals want to work in a profession still so married to "the way it was"? — *Jennifer Wilson*

Possible irrelevance and disintermediation. It will not be long before automation will be able to handle most of the role of current CPAs. What computers can't handle, offshoring will. — *Ed Kless*

The most important issue is an outdated business model. — *Gale Crosley*

The need to get out of our box(es), start looking forward and learning how to be proactive. — *Tom Hood*

Most important issue: Staff retention and



development. The work is plentiful. The technology is tops. The clients are understanding and appreciative. None of this will matter if we do not retain, train and develop our staff. — *Ed Mendlowitz*

The drain of talent away from local and regional firms is a real problem. We want young CPAs to know about the great opportunities that come with owning a small practice, or working in a local firm, or becoming a partner at a regional powerhouse firm. — *Jeff Phillips*

I'm concerned that the profession isn't producing enough CPAs to replace the Baby Boomers who will reach retirement age in the next five to 15 years. ... I'm particularly concerned that the profession won't be able to hold onto minority candidates if these issues aren't addressed. — *Ralph Thomas*

As specialization continues to grow in the accounting profession, we need to provide resources, career paths and opportunities to the next generation of CPA firm/practice leadership in these areas. — *Lyle Benson*

I believe the most important issue facing the accounting profession today is involving and preparing the next generation of CPAs to carry on and further the significant contributions that the Baby Boomers have invested their lives into developing. — *Belicia Cespedes*

Succession transition. A significant number of partners will leave the profession as the Baby Boomers head into retirement. Most firms will see a significant change in leadership in the next five to seven years. — *Sam Allred*

One of the most important issues facing our profession is the proliferation of data and its impact on the skill sets required of tomorrow's auditors. — *Lynne Doughtie*

One of the most important issues facing the profession continues to be complexity in accounting standards — specifically, making standards understandable for the average accountant trying to apply them in the real world. — *Jim Kroeker*

How do the accounting firms address the challenges facing the business model and the audit market while building stakeholder confidence that they are looking after investors. — *James Doty*

Rightly or wrongly, the accounting profession is struggling with a perceived lack of independence vis-à-vis the companies they audit. — *Hans Hoogervorst*

In the wake of sporadic corporate failures over the past decade or so, the most important issue has been demonstrating the value of accountants to society. There has been a crisis of confidence in the profession itself. — *Fayezul Choudhury*

I am becoming more and more concerned about the negative impression that many young people, and others, have about a career in accounting. ... I find a lot of negative things posted about the long hours and lack of appreciation. I often get feedback directly voicing the same concerns. — *Rita Keller*

Technology and change management — they're two parts of a very significant transformation that's underway within the profession. — *Erik Asgerisson*

Technology disruption, and the ability for smaller firms to change faster than legacy firms, is demanding that professional accounting firms change more rapidly in this environment. Thus, the most important issue facing the accounting profession is the need for firms to change fast. — *Jason Blumer*

Staying current with customer's needs. The accounting landscape is changing. Clients are becoming more and more sophisticated and their expectations from accounting professionals are rising. They want more advice, more insights, predictable pricing, and more real-time help. — *Jamie Sutherland*

I believe the most important issue currently facing the accounting profession is the confluence of a rapidly changing workforce and an equally dynamic technology landscape. — *David Cieslak*

The rate of technology change in the small-business marketplace is outpacing the rate of change inside small to mid-sized accounting firms. Firms are so inwardly focused on their own technology challenges that they are missing the opportunity that has presented itself to better serve this rapidly changing marketplace. — *Darren Root*

To read the full responses of all the T100 candidates, visit [AccountingToday.com](http://AccountingToday.com).

Tax Administration, 2004-present ... Inspector General, Corporation for National and Community Service, 2002-2004 ... Staff director and chief counsel, House Government Management, Information and Technology Subcommittee, 1995-2002 ... Law practice, Kramer, Levin, Naftalis, Nessen, Kamin & Frankel ... Associate director for policy, Office of National Service, White House ... Assistant general counsel, Office of Management and Budget ... Assistant district attorney, Queens County District Attorney's Office. **Education:** Harvard University Law School, JD ... Howard University, BA. **Personal:** Born in New York City.



## Russell Golden Chairman, FASB

A standard-setter's work is never done, and Golden is particularly busy, working to enhance and simplify U.S. GAAP while building ties with other standard-setters around the world. **Career Highlights:** Chairman, FASB, 2013-present; board member, 2010-2013; staff member, 2004-2013 ... Partner, Deloitte & Touche. **Education:** Washington State University, 1992, BA Business & Accounting. **Personal:** Born 1970, Alabama ... Married to Tracey ... One son. **Twitter:** @FAFNorwalk



## Jeff Gramlich President, AccountantsWorld

Gramlich brings a wealth of software development experience to his role at the software pioneer, where he'll also help them spread the word about the many advantages of life in the cloud. **Career Highlights:** President, AccountantsWorld LLC, 2013-present ... President, CCH Small Firm Services, 2006-2013; senior vice president of business development, CCH, 2003-2006 ... Vice president of product development, Thomson Corp., 1989-2003 ... Supervisory senior, Arthur Young & Co., 1984-1989 **Other Affiliations:** CITP ... AICPA ... Texas Society of CPAs. **Education:** University of Arkansas, 1982 BSBA Acctg. **Personal:** Born 1960, Fort Smith, Ark. ... Married to Mary Beth ... Three children.



## Angie Grissom President, The Rainmaker Companies

Grissom's organization is a great model for accounting firms: constantly making use of new tools, approaches, ideas and technologies in the pursuit of their mission — which just happens to be teaching accounting firms how to better pursue their own missions. **Career Highlights:** President, The Rainmaker Companies, 2013; Executive vice president, chief operating officer and owner, The Rainmaker Consulting Group, 2010-2012; vice president and director of consulting, Rainmaker Consulting, 2004-2010; trainer and facilitator, Rainmaker Academy, 2004-present;

senior consultant, Enterprise Network, 2001-2004. **Other Affiliations:** New Horizons member ... Original member, CPA Consultants' Alliance ... Past president, AFWA Music City Chapter ... National Speaker's Association ... Association for Accounting Marketing ... Nashville City Club ... Association for Talent Development. **Education:** Middle Tennessee State University, 2000, BBA. **Personal:** Born 1977, Nashville, Tenn. ... Married to Chad ... Two children. **Blog/Twitter:** <http://www.therainmakercompanies.com/blog/> / @atgrissom



## Jay Hanson Board member, PCAOB

A glance at Hanson's long list of speeches and statements is instructive: Not only is the 32-year McGladrey vet deeply engaged in the board's work overseeing public company auditors, but he's deeply engaged in explaining that work to its many constituents. **Career Highlights:** Member, Public Company Accounting Oversight Board, 2011-present ... To national director of accounting, McGladrey & Pullen, 1979-2011. **Other Affiliations:** Emerging Issues Task Force, Financial Accounting Standards Board, 2006-2011 ... Past chair, AICPA Financial Reporting Executive Committee ... American Accounting Association. **Education:** Concordia College, BA Business Administration, Accounting and Mathematics. **Personal:** Born 1957, St. Paul, Minn. ... Two grandchildren.



## Roger Harris President and COO, Padgett Business Services

A familiar figure at Washington hearings and the IRS, Harris brings the concerns of small businesses and their advisors inside the Beltway, and returns with the inside scoop from the corridors of power. **Career Highlights:** President and chief operating officer, Padgett Business Services, 1992-present; franchise president and chairman, 1982-1992; staff accountant: 1972-1982. **Other Affiliations:** National Society of Accountants ... Past chair, Internal Revenue Service Advisory Council ... National Association of Enrolled Agents ... President, Padgett Foundation ... Treasurer, Padgett Business Services PAC ... Past president, University of Georgia Tip-Off Club. **Education:** University of Georgia Terry College of Business, 1973, BBA Accounting. **Personal:** Born 1950, Athens, Ga. ... Two children ... Two grandchildren.



## Sen. Orrin Hatch R-Utah

Hatch's role as head of the Senate's main tax-writing committee — to say nothing of his many years of seniority — put him in a strong position to shape the future of tax reform. Assuming,

that is, that tax reform has a future in the run-up to a national election ...

**Career Highlights:** President pro tem, U.S. Senate; chair, Finance Committee, 2014-present; past chair, Judiciary Committee and Health, Education, Labor and Pensions Committee; elected, 1976 ... Private law practice ... Band manager, The Free Agency (Mormon folk band).

**Other Affiliations:** Co-chair, Board of Visitors, Federalist Society ... Board member, U.S. Holocaust Memorial Museum.

**Education:** University of Pittsburgh Law School, 1962, JD ... Brigham Young University, 1949, BA History.

**Personal:** Born 1934, Pittsburgh ... Married to Elaine ... Six children, 23 grandchildren, 10 great-grandchildren.



### Tom Hood CEO and executive director, MACPA

Hood's greatest attribute isn't that he consistently glimpses the future more quickly than the rest of us (though he does). It's that he's able to bring it back to the present and serve as its tireless, inspiring and effective champion.

**Career Highlights:** CEO and executive director, Maryland Association of CPAs & Business Learning Institute, 1997-present ... CFO and principal, Bryn Awel Corp., 1985-1997 ... Accounting systems analyst, RTKL Associates Inc., 1981-1985 ... Staff accountant, Finance Co. of America, 1978-1981.

**Other Affiliations:** President and CEO, Business Learning Institute Inc. ... Past president, CPA State Executives Association ... Board member, Shared Services LLC ... Member, CPE Advisory Committee, AICPA; CPA Horizons 2025; former member, Special Committee on Mobility, Special Committee on Enhanced Business Reporting; Past chair, CPA Vision Project, AICPA ... Co-chair, Board of Directors, State Societies Network Inc. ... American Society of Association Executives ... World Future Society ... Finance Committee, McDonough School.

**Education:** Johns Hopkins University, 1994, MS Finance - Real Estate ... University of Baltimore, 1982, Master's equivalent - Information Systems ... Loyola College of Maryland, 1977, BA Accounting.

**Personal:** Born 1959, Baltimore ... Married to Sharon ... Three boys.

**Blog/Twitter:** [www.cpasuccess.com/](http://www.cpasuccess.com/) @tomhood



### Hans Hoogervorst Chairman, IASB

As the dream of convergence peters out, Hoogervorst is busy issuing his own standards, charting an independent path for his board, and working to cement its place on the global scene.

**Career Highlights:** Chairman, International Accounting Standards Board, 2011-present ... Chairman, Authority for Financial Markets, The Netherlands, 2007-2011 ... Minister of health, welfare and sport, The Netherlands, 2003-2007; minister of finance, 2002-2003; state secretary of social affairs and employment, 1998-2002 ... Member of Parliament, The Netherlands, 1994-1998 ... Policy assistant on finance, People's Party for Freedom and Democracy, 1988-1994 ... Policy officer for international monetary

affairs, Ministry of Finance, The Netherlands ... International banking officer, National Bank of Washington, 1983-1986

**Other Affiliations:** Past chair, IOSCO Technical Committee ... Past co-chair, Financial Crisis Advisory Group ... Past chair, IFRS Foundation Monitoring Board.

**Education:** Johns Hopkins University, 1983, MA in Advanced International Relations; University of Amsterdam, 1981, Master's in Modern History.

**Personal:** Born 1956, Haarlem, The Netherlands.



### Stephen Howe Managing partner, EY

Howe continues to lead his firm to one of the strongest growth rates among the Big Four, while making time to regularly visit college campuses to talk up the profession, as well as encouraging education in STEM topics.

**Career Highlights:** Managing partner, Ernst & Young LLP; managing partner, EY Americas; chair, EY Americas Executive Board and U.S. Board; member, EY Global Executive Board; MP, Financial Services Office, 2001-2007; audit partner, 1993-2001; joined, 1983.

**Other Affiliations:** Governing Board, Center for Audit Quality ... Trustee, Financial Accounting Foundation.

**Education:** New York University Stern School, 1989, MBA Acctg. and Finance ... Colgate University, 1983, BA Mathematical Economics.

**Personal:** Born 1961, Winthrop, Mass. ... Married to Kate ... Four children.

**Twitter:** @stevehoweEY



### Sandy Johnson President, NCCPAP

Johnson is taking her passion for helping her fellow accountants nationwide and to new generations, as NCCPAP works to expand its footprint from beyond its traditional heartlands and demographics to reach younger accountants across the country.

**Career Highlights:** CEO, Sandra G. Johnson CPA PC ... Staff accountant, Amrosio & Bellotti, 1986-2000.

**Other Affiliations:** President, National Conference of CPA Practitioners, 2014-present ... Adjunct professor, Five Towns College, 2009-2012; adjunct professor, SUNY-Old Westbury, 2008 ... Instructor, Hofstra University, 2000-2008 ... Past president, Bellmore Chamber of Commerce ... Past president, Long Island Center for Business & Professional Women ... AICPA ... NYSSCPA ... ACFE.

**Education:** SUNY Old Westbury, 1987, BS Acctg.

**Personal:** Born 1959, Glen Cove, N.Y. ... Three children, two grandchildren

**Twitter/blog:** @sjohnsoncpa / sgjcpa.blogspot.com



### Randy Johnston Partner, K2 Enterprises; CEO, NMGI

Johnston is probably best known to the profession for explaining technology to accountants at countless industry confer-

ences and events — but he's also influential behind the scenes, explaining accountants to technology companies, helping them build better software.

**Career Highlights:** Executive vice president and shareholder, K2 Enterprises, 1990-present ... CEO and co-founder, Network Management Group Inc., 1983-present ... Department chair; professor; adjunct, Hutchinson Community College, 1977-1997 ... Programmer and system designer, Professional Data Services, 1978-1981 ... Programmer and system designer, Farmland Industries, 1977-1978.

**Other Affiliations:** Past chairman, AICPA Technology Conference ... Author, *Basic Using Micros; Business Computing Systems; Computers: An Introduction; Technology Best Practices; Accounting Software Solutions; Paperless Office* ... Member, Optimist International ... Past member, USD308 School Board ... Past member, USD308 School Board.

**Education:** Western Washington University, postgraduate ... James Madison University, postgraduate ... University of Central Oklahoma, postgraduate ... Wichita State University, 1981, MCS ... Kansas State University, 1977, BS CS Math ... Hutchinson Community College, 1975, AA CS.

**Personal:** Born 1955, Hutchinson, Kansas ... Married to Pam ... Four children, four grandchildren.

**Blog/Twitter:** Randy's Ramblings <http://rpjohnston.wordpress.com/> @RPJohnston



### Edward Karl Vice president of taxation, AICPA

As the institute's point man on tax issues, Karl keeps his eye on new developments that members need to know about — and that the AICPA may want to use its influence in Washington to change.

**Career Highlights:** Vice president of taxation, American Institute of CPAs, 2010-present; director, AICPA Tax Division, 1989-2010; AICPA technical manager, 1983-1989 ... Accounting positions, various CPA firms, 1975-1983.

**Other Affiliations:** Greater Washington Society of CPAs ... Maryland Association of CPAs ... American Society of Association Executives.

**Education:** University of Maryland, 1975, BS Acctg.

**Personal:** Born 1954, Washington, D.C. ... Married to Martha ... Three children; five grandchildren.

**Blog:** <http://blog.aicpa.org/>



### Rita Keller President, Keller Advisors

Between her blog, her speaking engagements and her consulting practice, Keller is doing as much as anyone to take the management of accounting practices up a much-needed notch.

**Career Highlights:** President and founder, Keller Advisors, 2008-present ... Co-founder, SurveyCPA, 2012-present ... Shareholder and chief operating officer, Brady Ware CPAs, 1978-2008.

**Other Affiliations:** Past president, Planning Committee, AICPA Practitioners' Symposium & Tech+ ... Member Services Council, Ohio CPA Society; Women's Initiative Committee ... New Horizon Group of CPA Consultants ... Founding member, CPA Consul-

# OTW

## Just a few more ...

It is our painful duty every year to deny spots on the list to people who are clearly influential, simply because there are only 100 spots. Levels of influence are not easily measurable, and we always find ourselves agonizing over the exact composition of the T100.

That unpleasant task is somewhat balanced, however, by the pleasure of recognizing up-and-coming figures — and at the intersection of those two lies our "Ones to Watch" list, where we get to recognize a few more players in the profession. Some have been influential for years, and others are just beginning to make their presence known, but we think all of them are worth paying attention to in their respective corners of the profession.

Let's start with a number of people who have come into their positions within the past year, like Financial Executives International interim chief executive officer Paul Chase, who is filling in after the departure of long-time T100 stalwart Marie Hollein. In a similar vein, we'll be watching J. Michael McGuire of Grant Thornton, who succeeded to the CEO spot of T100 regular Stephen Chipman this year, and Stephen Whitlock, who is taking the helm at the Internal Revenue Service's Office of Professional Responsibility, after a stint as founding chief of its Whistleblower Office. Finally, executive turnover also brought in Russell Fujioka at cloud accounting software company Xero, and Stephen Kelly at accounting and business software developer Sage.

While we're still in the technology sphere, we'll note that we have our eye on a few other people: Neither Jon Roskill nor his cloud accounting software company, Acumatica, are new to the profession, but they have upped their profile significantly lately, and we're looking at Avalara founder and CEO Scott McFarlane in part because of the huge amount of venture funding he's been bringing into the sales tax automator. We're also paying attention to David Leary, Intuit's senior developer evangelist, for his role in building out the company's ecosystem of third-party apps. And finally, also not new in the tech space is Satya Nadella, who's now in charge of Microsoft — but we mention him because he used to run their accounting division, and we wonder



what it might mean for the profession to have someone with that level of knowledge of accounting in a position of such power at the software giant ....

All this technology has made us think of the cloud, which reminds us of two folks from CPA.com, professional services systems engineer Thomas Gawne and director of communications Samantha Mansfield, who have been serving along with colleague Greg LaFollette as high-profile promoters of the cloud.

From CPA.com, it's a short step to the American Institute of CPAs, where we'll draw your attention to three people we've been seeing a lot, and expect to see more of: director of diversity and inclusion Kim Drumgo, director of taxation Jina Etienne, and senior manager of college and university initiatives Rebecca Mahler.

In the end, the vast majority of the people in the T100 and in our Ones to Watch are about making the profession better, but there is a special subset that is very specifically about making your individual practice or career better, and in that realm of consultancy, a number stood out for us this year: Martin Bissett is bringing lessons learned in the U.K. to improving growth and succession options at firms here in the U.S., while Kristen Rampe is bringing passion and a sense of humor to helping firms perform better. Dustin Hostetler, meanwhile, has found a great platform for bringing his Lean Six Sigma consulting to a broader swathe of the profession since joining Boomer Consulting at the start of the year, and Adam Blitz has launched his own consulting practice recently to help other CPAs accomplish more by building better teams. Also worth noting is blogger, business strategist and brand consultant Danetha Doe, who has good advice for accountants on why they need a strong brand. And for a very different kind of consulting, we'll mention Russell Shapiro, a lawyer and CPA who helps negotiate and structure many of the biggest mergers in the accounting space.

Last but definitely not least, we recommend you pay attention to accountant and virtual CFO Cathy Iconis, whose weekly Twitter chat on all things QuickBooks, QBOChat, draws big audiences and proves that there are some accountants who can handle social media!

— The Editors

tants' Alliance... Past board member and national president, Association for Accounting Administration; co-founder, Ohio Chapter; past president, Indiana chapter ... AICPA Seasonality Success Newsletter ... Contributor, AICPA PCPS Human Capital Center; contributing author, AICPA MAP Handbook.

**Education:** St. Mary of the Woods College.

**Personal:** Born in New Paris, Ohio ... Married to Darrell ... One son; two grandchildren.

**Blog/Twitter:** www.ritakeller.com/blog / @cpamanagement



## Roman Kepczyk Director of consulting, Xcentric

As an Ironman triathlete, Kepczyk is used to nearly impossible challenges, which is why he's perfect for the role of teaching technology best practices to accountants through his conference appearances, articles, books and consulting work.

**Career Highlights:** Director of Consulting, Xcentric LLC, 2011-present ... President, InfoTech Partners North America, 1999-2011 ... Consultant, Varney Mills/Boomer Consulting, 1996-1999 ... Partner and Director of Administration and External Consulting, Henry & Home CPAs, 1986-1996.

**Other Affiliations:** Author, *A Quantum of Paperless* (2nd ed.) ... Advisory Board, AAA, 1994-present ... Past chair, IT Executive Committee, Top Technologies, AICPA ... Past board member, Arizona Society of CPAs ... Columnist, *CPA Practice Advisor*; *CCH Journal of Practice Management*; *PPC Audit and Accounting Update*.

**Education:** Arizona State University, 1994, BS Accounting.

**Personal:** Berlin, Germany, 1961 ... Married ... Two children ... Ironman triathlete, open water swimmer, Grand Canyon runner.

**Blog/Twitter:** Xcentric.com/Blog / @RomanCITP



## Ed Kless Senior director of partner development and strategy, Sage

In addition to his work at Sage, Kless is a thought leader with a passion for being a knowledge worker in a knowledge economy that he shares in public appearances, leadership groups, and the weekly radio show he co-hosts with Ron Baker.

**Career Highlights:** Senior director of partner development and strategy, Sage, 2003-present ... Senior fellow, VeraSage Institute, 2007-present ... Consultant, Tipping Point Advisors, 2002-2003 ... Founder and principal, Third Wave Business Systems, 1996-2001.

**Other Affiliations:** Radio talk show host, "The Soul of Enterprise," VoiceAmerica Business Channel ... Chair, Collin County Libertarian Party ... Candidate, Texas State Senate, 2010-2012 ... Past president, Allen Toastmasters.

**Education:** Pace University, 1988, BA Liberal Studies.

**Personal:** Born 1966, Brooklyn, N.Y. ... Married to Christine ... Two children, plus three from a previous marriage.



## Allan Koltin CEO, Koltin Consulting Group

He has been called the "match-maker" of the profession, but Koltin isn't just making introductions — he's helping structure the future, and helping accountants build firms that can thrive there through consulting, education and, yes, M&A.

**Career Highlights:** CEO, Koltin Consulting Group Inc., 2011-present ... President and CEO, PDI Global, 1986-2011 ... Partner, FERS CPAs, 1986-1998 ... Director, Nankin, Schnoll, 1980-1982.

**Other Affiliations:** Founding member, The Advisory Board ... Hall of Fame Member, AAM ... Publisher/author, *Successful Merger & Acquisition Strategies*; *CPAs That Sell*; *How to Market a Consulting Niche* ... Board, ComplyGlobal ... Past board member, Outsource Partners International, NACVA, H&R Block Business Services Group, Association for Accounting Marketing.

**Education:** University of Wisconsin, Milwaukee and Madison, 1980 BS Accounting and Marketing

**Personal:** Born 1957, Milwaukee ... Married to Sharon ... Three children



## John Koskinen Commissioner, IRS

Given its tarnished reputation, it can be hard to argue the IRS's case to Congress and the rest of the country, but Koskinen is game for a challenge, sticking consistently to a simple message: Without proper funding, the agency can't be expected to provide decent service — or to collect the revenues the country needs.

**Career Highlights:** Commissioner, Internal Revenue Service, 2013-present ... Interim CEO, principal financial officer, Freddie Mac, 2009; non-executive chair, 2008-2012 ... President, U.S. Soccer Foundation, 2004-2008 ... Deputy mayor, District of Columbia ... Deputy director for management, Office of Management and Budget ... To president, CEO and chairman, The Palmieri Co. ... Administrative assistant, Sen. Abraham Ribicoff, 1969-1973 ... Legislative assistant, New York City Mayor John Lindsay, 1968-1969 ... Assistant to the deputy executive director, National Advisory Commission on Civil Disorders, 1967-1968 ... Lawyer, Gibson, Dunn & Crutcher, 1966-1967 ... Law clerk, U.S. Court of Appeals for the District of Columbia, 1965-1966.

**Other Affiliations:** Past board member, AES; American Capital.

**Education:** Cambridge University, 1965-1965, post-graduate work ... Yale University School of Law, 1964, JD/LLB ... Duke University, 1961, BA Physics.

**Personal:** Born 1939, Cleveland ... Married to Patricia ... Two children.



## Mark Koziel Vice president of firm services & global alliances, AICPA

Anywhere you go, Mark Koziel has either just been there, or is going to be there in a few

weeks, or is, in fact, there right now, helping firms solve problems and otherwise sharing his deep knowledge of the profession with his trademark wit and insight.

**Career Highlights:** Vice president of firm services & global alliances, AICPA, 2011-present; director, specialized communities/firm practice management, AICPA 2009-2011; senior technical manager, firm practice management/PCPS, AICPA, 2006-2009 ... Director of media planning, Joe Slade White & Co., 2003-2006 ... Director, Dopkins & Co., 1994-2003 ... Senior, Lumsden & McCormick, 1991-1994.

**Other Affiliations:** North Carolina Association of CPAs, New York State Society of CPAs ... Past president Buffalo Chapter, New York State Society of CPAs 2003; founding member, Young CPAs Committee, Buffalo Chapter.

**Education:** Canisius College, Buffalo, N.Y., 1991, BS Accounting.

**Personal:** Born 1968, Buffalo, N.Y. ... Married to Maryann ... One son.

**Twitter:** @markkoziel



## Jim Kroeker Vice chairman, FASB

The unique mix of experience Kroeker brings — from both public accounting and his stint at the SEC — makes him a tremendous resource for FASB, so much so that they created the vice chair position just for him.

**Career Highlights:** Vice chairman, Financial Accounting Standards Board, 2013-present ... Deputy managing partner for professional practice, Deloitte, 2013 ... Chief accountant, Securities and Exchange Commission, 2009-2012; acting chief accountant, January-August 2009; deputy chief accountant, 2007-2009 ... Partner, National Office Accounting Services Group, Deloitte, 2002-2007; manager, National Office Accounting Research Group, 1997.

**Other Affiliations:** Practice fellow, FASB, 1999-2001.

**Education:** University of Nebraska, 1992, BS Accounting.

**Personal:** Born 1969.



## Rene Lacerte Founder and CEO, Bill.com

Lacerte continues to revolutionize the back office, with tools that make the lives of CPAs and their clients easier, and that all the other software vendors want to integrate with.

**Career Highlights:** Founder and CEO, Bill.com 2006-present ... Co-founder, board member and CEO/CFO, PayCycle (acquired by Intuit in 2009), 1999-2009 ... Senior product manager/group product manager, Intuit, 1994-1999 ... Vice president of operations and development, CertiData, 1992-1993 ... Senior consultant, Price Waterhouse, 1989-1992.

**Other Affiliations:** Board member, Kent School ... Columnist, Inc.com.

**Education:** Stanford University, 1989, MS Industrial Engineering; 1989, BA Economics and Quantitative Economics.

**Personal:** Born 1967, Virginia ... Married to Joyce ... Two children.

**Blog/Twitter:** blog.bill.com / @rlacerte



## Greg LaFollette

**Strategic advisor, CPA.com**

A long-time thought leader, in the last few years LaFollette has found a new role helping CPA.com orchestrate its campaign to educate the profession on the many changes technology has brought to the practice of accounting.

**Career Highlights:** Strategic advisor, CPA.com, 2014-present; VP of product strategy, CPA.com, 2011-2014 ... Executive editor, *CPA Technology Advisor*, 2005-2010 ... Managing member, LaFollette Consulting LLP, 2005-2011 ... VP of product strategy, Thomson Reuters Tax & Accounting, 1999-2005 ... Tax and technology partner, LaFollette, Jansa, Brandt & Co. LLP, 1976-1999 ... Business manager, McCrossan Boys Ranch, 1968-1976

**Other Affiliations:** AICPA ... South Dakota CPA Society ... Rotary ... CITP Credential Committee, AICPA; chair, Tech+ Steering Committee ... President, South Dakota Prairie Repertory Theater Board ... Chair, City of Sioux Falls Ethics Committee.

**Education:** Augustana College, 1975, Professional Accounting.

**Personal:** Born 1947, Sioux Falls, S.D. ... Married to Kaye ... One daughter.

**Twitter/Blog:** @glafollette / <http://glafollette.strikingly.com/>



## Taylor Macdonald

**Vice president of channels, Intacct**

Intacct has many devoted fans among accountants, and this veteran former reseller with decades of experience in the market is a big part of that.

**Career Highlights:** Vice president of channels, Intacct, 2010-present ... Vice president of channels, Promethean 2008-2009 ... Vice president of worldwide channels and sales alliances, Deltek Inc., 2007-2008 ... Chief channel and strategy officer, Sage Software 2006-2007; executive vice president of channel and sales operations, 2004-2006; senior vice president of business partners and vice president of partner development, Best Software (later Sage), 1998-2004 ... President and founder, Macdonald Consulting Group, 1989-1998 ... Director of management advisory services, Smith & Howard PC, 1987-1989 ... Vice president of finance, Resort Storage Management, 1985-1987 ... Manager, Policy Management Systems, 1981-1985.

**Other Affiliations:** Board, Information Technology Alliance ... Past board member, Southeastern Software Association.

**Education:** Yale University, 1977, BS.

**Personal:** Born 1955, Dallas ... Married to Cindy ... Four children.

**Twitter:** @taylormacd



## Teresa Mackintosh

**President and CEO, Wolters Kluwer, CCH**

As a CPA with two decades of experience in the software space, Mackintosh brings a valuable perspective to the tools her company builds, as well as great insights into

the way accountants should use them.

**Career Highlights:** President and CEO, CCH Software, Wolters Kluwer Tax & Accounting US, 2015; President and CEO, Wolters Kluwer, CCH US, 2013-2014; president and GM, US Software, Wolters Kluwer, CCH, 2013; executive vice president and GM of Tax, 2012-2013 ... GM and senior vice president, Indirect, Property, and Trust, Tax & Accounting business of Thomson Reuters, 2011-2012; GM and SVP, Workflow & Service Solutions, Americas-Professional, 2010-2011; SVP, Core Market, 2008-2009; VP of strategic marketing, Thomson Tax & Accounting, 2006-2008; director of product management, Creative Solutions, 2001-2003; UltraTax CS development manager, Creative Solutions, 1997-2001 ... Tax consultant, Price Waterhouse, 1994-1996.

**Other Affiliations:** AICPA ... American Marketing Association.

**Education:** University of Michigan, 2001, MBA; 1994, BBA.

**Personal:** Born 1972, Owosso, Mich. ... Married to Craig ... One daughter and one son.

**Twitter:** @tmackintosh



## Jason Marx

**President, CCH Small Firm Services, Wolters Kluwer Tax & Accounting**

Small accounting and tax firms have long looked to Marx's group for tax prep and research tools, but now he's bringing them the sort of cloud-based practice management tools and portals that have mostly been the preserve of larger practices.

**Career Highlights:** President, CCH Small Firm Services, 2013-present; vice president and general manager, 2007-2013 ... Executive vice president, FMF Capital, 2004-2007 ... Vice president of operations, Kaufman Financial Group, 2000-2003 ... Managing director, AMRESO Residential Credit Corp., 1995-1999 ... Vice president, director of acquisitions, Household Finance Corp., 1988-1995.

**Other Affiliations:** Past board member, National Flood Determination Association ... Member, American Financial Services Association ... Association for Financial Technology ... Mortgage Bankers Association ... American Bankers Association

**Education:** DePaul University, 1992, MBA ... University of Michigan, 1988, BA.



## Chuck McCabe

**Founder, president and CEO, The Income Tax School Inc.**

Between late tax laws, compressed filing seasons, staffing challenges and declining IRS service levels, being a tax practitioner can be a drag — but McCabe and his organization are dedicated to helping tax pros build stronger, more profitable and less hectic practices.

**Career Highlights:** Founder, president and CEO, The Income Tax School Inc., 1989-present ... Founder, president/CEO Peoples Income Tax Inc., 1987-present ... COO, Bay Colony Ltd., 1983-1986 ... Tax preparer, assistant district manager, district manager, regional director, H&R Block Inc., 1968 to 1983.

**Other Affiliations:** IRS Electronic Tax Advisory Committee ... Founding chair, Virginia Council of CEOs ... Chair, Better Business Bureau of Central Virginia ... Director, Greater Richmond Chamber of Commerce ... University of Richmond Dean's Advisory Board ... Leadership Metro Richmond.

**Education:** Pace University, 1983, ABD; 1981, Executive ... Adelphi University, 1979, BS.

**Personal:** Born 1944, New York City ... Married to Marilyn ... Two children.

**Blog/Twitter:** [www.theincometaxschool.com/blog/](http://www.theincometaxschool.com/blog/) / @PeoplesTax, @TaxSchool



## Jim McGinnis

**Vice president, Accountant and Advisor Group, Intuit**

With a host of events, a social media blitz, and a range of new tools and enhancements to old ones, McGinnis is proving to accountants that Intuit doesn't just want to be their software provider; it wants to be their partner.

**Career Highlights:** Vice president, Accountant and Advisor Group, Intuit, 2014-present; vice president, marketing, Accounting Professionals Division, 2010-2014 ... Executive vice president and general manager, Licensed Products Division, Activision, 2008-2010 ... Vice president marketing, PepsiCo-Tropicana, 2005-2008 ... Marketing director, PepsiCo International-Smiths Snackfood Australia, 2003-2005 ... Regional account director, Boston Beer Co., 1987-1989

**Education:** Northwestern University - Kellogg School of Management, 1991, MBA ... Duke University, 1987, BA, Economics.

**Personal:** Born 1965, Asmara, Eritrea ... Married to Koren ... Two children.

**Blog/Twitter:** [accountants.intuit.com/](http://accountants.intuit.com/) / @jim\_mcginis



## Barry Melancon

**President and CEO, AICPA**

Melancon is unique in his ability to unite a practical, in-the-trenches understanding of the current state of the accounting profession with a far-sighted, long-term vision of where it should be, so as to be able to lead it from its present to its future.

**Career Highlights:** President and CEO, AICPA, 1995-present ... Executive director, Society of Louisiana CPAs, 1987-1995 ... Shareholder, Bergeron & Co., 1979-1987.

**Other Affiliations:** CEO, Association of International Certified Professional Accountants (joint venture with the Chartered Institute of Management Accountants) ... U.S. Delegation, IFAC ... Chairman, XBRL-US ... U.S. Chamber of Commerce's Center for Capital Markets Competitiveness ... Board, Global Accounting Alliance ... Board, New York Society of Association Executives ... International Integrated Reporting Council.

**Education:** Nicholls State University, 1983, MBA; 1978, BS.

**Personal:** Born 1958, Houma, La. ... Married to Patty ... One son.

**Twitter:** @barrymelancon

# Q&A

## The quest for work-life balance

*As part of our Top 100 Most Influential People in Accounting report, we asked the candidates if they had achieved work-life balance. Many said they had — though often after much struggling — but some ruefully admitted they hadn't, and still others repudiated the whole idea. A sampling of their answers is given below.*

Sometimes my life wins more of my time and sometimes my work wins more of my time, but in the big scheme of things I feel very little stress in my life — and I feel that I have a life that values both parts.

— Sandra Wiley

I have always made sure to not overload my calendar and always keep room to think about substance and strategy. Free time is essential to keeping a fresh mind and making the right decisions.

— Hans Hoogervorst

Yes, especially after launching my daughters into their own careers! ... I particularly tried to provide a good example of commitment to career and family to my daughters and the many women who I mentored over the years.

— Jeanette Franzel

Yes. I have finally learned that you don't always have to say yes to everything. No is a small but important word.

— August Aquila

First, it isn't balance, in my opinion. It's blend. We give and take from each area. Work and life blend today, in a far more fluid way. ... If we want to continue to attract the best and brightest to the profession we have to walk the walk on this — and it really is something that has to start at the top. So, yes, I take steps to make sure I have balance in my life, taking time out for family and friends and decompressing. But it is difficult.

— Barry Melancon

I believe I have achieved a healthy work-life balance, although you may have to ask my family!

— Cindy Fornelli

Yes. My family is extremely important to me, so I make sure my schedule reflects that priority. I also firmly believe that



work-life balance helps build a stronger organization and more business success.

— Erik Asgerisson

I think I have achieved a work-life balance. It helps when you love your work.

— George Farrah

I enjoy what I do and believe that I have achieved work-life balance because I think like a Millennial and not like a Boomer. ... Work-life balance is a state of mind and not a predetermined set of hours.

— David Bergstein

I fear that I have achieved work-life balance because work is my life! But seriously, it is a gift to be able to do a job that you love, so that the time you spend does not feel like "work."

— Paul Caron

Does a work-life balance really exist? It is a little bit of give and take. I am passionate about my children and my husband and I am also passionate about my company and clients. I don't sit around much and have pretty long days every day.

— Angie Grissom

I probably don't have as much work-life balance as others think I should have, but it seems perfect to my spouse of 39 years and me.

— Randy Johnston

I don't believe I have the work-life balance perfected. And I may never. But as long as I am mindful of it and look for new ways to achieve balance, I'm heading in the right direction.

— Rene Lacerte

I think that achieving work-life balance is a constant challenge and ever-evolving. ... I've always said that I "work to live" not "live to work." I hope I'm practicing that.

— Todd Shapiro

I tried to achieve it when our children were at home. I was never totally successful. Now that they are gone, I try to achieve it in a different way, but am still not totally successful. The problem is that I love my work, and would rather do it than almost anything else!

— Gale Crosley

No. I've tried to achieve it, but I have a hard time saying no.

— Ralph Thomas

Work-life balance is one of those concepts that truly is measured in the eye of the beholder. I should disclose that I have been criticized for not being sufficient in achiev-

ing it by others. I take that seriously, but often disagree with that interpretation.

— Ken Bishop

Unfortunately I've never accomplished this "work-life balance" thing. I'm not even sure I know what it means. I chose to work in the CPA community. This is a 24/7 lifestyle choice.

— Jay Nisberg

These days, the scale is tilted a bit more toward work versus personal time than I would like, but I'm told by people wiser than me that I should be thankful that business is so good.

— Marc Rosenberg

I am not sure total work-life balance is truly feasible — especially with the way today's technology keeps us in constant contact and fuels responsiveness expectations.

— David Vaudt

I have definitely not achieved work-life balance, in that I work far too much and I bring far too much of my work home with me, mentally and emotionally. That said, I don't think work/life balance is the right goal for anyone who has fully embraced the profession.

— Joe Woodard

I believe work-life balance is for slackers. I believe in work-life integration. As a knowledge worker, I am always working, in that I am sentient and conscious. I am always on the lookout to learn new things and look for connections in all aspects of life to business.

— Ed Kless

I work all the time, but it's on my time. It's not balance. It's just my life. Why does work have to be separate and distinct from my real life?

— Jody Padar

Balance is for tires and ballerinas. Work-life balance is a misleading expression. Life and work are not two different things, but intimately interrelated. The word "balance" is also untrustworthy; it's too obvious, not to mention a terminally boring idea.

— Ron Baker

Why can't you "do both" or "do all" with a commitment to being there for your family and co-workers? Why can't you work hard at both? Why can't you love your family and love your work? Balance implies that you must choose one over the other.

— Jeffrey Thomson

To read the full responses of all the T100 candidates, visit [AccountingToday.com](http://AccountingToday.com).



## Ed Mendlowitz Partner emeritus, WithumSmith+Brown

Five decades in the profession have taught Ed an awful lot — and he is determined to share it all with the profession through his frequent blogs and columns, his Partners' Network, and his growing collection of practice guidebooks.

**Career Highlights:** Partner emeritus, WithumSmith+Brown, 2005-present ... Partner, Mendlowitz Weissen LLP 1988-2005 (merged into WS+B in 2005) ... Shareholder, Siegel, Mendlowitz & Rich, 1974-1988 ... Shareholder and employee Jack Grushan & Co., 1970-1973 ... Self-employed, 1969-1970 ... Staff accountant, Garber Kleinman Trachtenberg & Cornick and Bernard D. Kleinman, 1966-1969 ... Staff accountant, Friedman Alpern & Green 1965-1966 ... Julian C. Ruben & Co., 1963-1965 ... Jacob J. Turner, CPA, 1963. **Other Affiliations:** AICPA ... Chairman, 100th Anniversary Committee, New York State Society of CPAs ... New Jersey Society of CPAs ... Treasurer, East Brunswick Public Library Foundation ... Treasurer, American First Day Cover Society. **Education:** Baruch School, City College of New York, 1963, BBA.

**Personal:** Born 1942, New York City ... Married to Ronnie ... Two children and two grandchildren.

**Twitter/Blog:** @emendlowitz / [www.partners-network.com](http://www.partners-network.com)



## Robert Moritz Chairman and senior partner, PwC

Besides all his efforts to boost revenues — including major moves in consulting like acquiring Booz — Moritz is well-known for his advocacy of diversity and non-traditional career tracks.

**Career Highlights:** U.S. chairman and senior partner, PwC, 2009-present; U.S. assurance leader, 2006-2009; New York office and Metro Region managing partner, 2004-2006; leader, financial services audit and business advisory practice, 2001-2004; leader, Metro regional financial services, 1998-2001; partner, 1995; joined, 1985.

**Other Affiliations:** Governing Board, Center for Audit Quality ... AICPA ... New York State Society of CPAs ... New Jersey Society of CPAs ... Partnership for New York City ... Atlantic Council.

**Education:** State University of New York at Oswego, BS, 1985.

**Personal:** Born 1963, New York ... Two children.



## Stan Mork President, ITA

Under Mork, the ITA is growing its membership, with a special focus on drawing in the ever-elusive next generation of tech experts and consultants.

**Career Highlights:** President, Information Technology Alliance, 2013-present ... Principal - Technology Consulting, McGladrey; national leader of IT transaction advisory services, 2012; national leader of IT consulting, 2004-2006; 1994-1996; joined, 1984 ... System Analyst, Farm Credit Services, 1982-1984 ...

Sales representative, Digital Equipment, 1980-1982 ... Territory representative, Burroughs Corporation, 1978-1980.

**Other Affiliations:** Past board member, Information Technology Alliance ... Volunteer chair, 2003 Leadership St. Paul Planning Committee.

**Education:** Leadership St. Paul Program, 2001 ... Concordia College, BA Business Administration.

**Personal:** Born in Albert Lea, Minn. ... Married to Carrie.

**Twitter:** @stanmork



## Zach Nelson President and CEO, NetSuite

Under Nelson, NetSuite is moving from strength to strength, signing up high-profile resellers, making strategic acquisitions, and inking a new cloud alliance with Microsoft.

**Career Highlights:** President and CEO, NetSuite Inc., 2002-present ... Various positions, including CEO of myCIO.com, McAfee/Network Associates, 1996-2001 ... To vice president of worldwide marketing, Oracle, 1992-1996 ... Sun Microsystems, 1989-1992.

**Other Affiliations:** Board member, NetSuite ... Patent holder.

**Education:** Stanford University, MA; BS.

**Personal:** Born 1961, Omaha, Neb. ... Married to Elizabeth ... One daughter.



## Jay Nisberg President, Jay Nisberg & Associates

Accounting's Dr. Jay works both behind the scenes and out front to help firms be the best they can, whether it's by facilitating meaningful retreats or helping create successful mergers.

**Career Highlights:** President and management consultant, Jay Nisberg & Associates Ltd., 1972-present.

**Other Affiliations:** Founder and former member, The Advisory Board ... Trustee, National Parks Trust ... Co-founder, Professional Alliance Group ... Author, *How to Manage Your Accounting Practice*; *From Chaos to Order*; *The Random House Dictionary of Business Terms*.

**Education:** Pacific Western University, Ph.D., Business Administration ... Detroit College of Law, non-degree program, 1968, Labor Relations Training; MA/Ph.D. Combined Program, 1970, ABD ... University of Buffalo, 1968, BA Social Sciences.

**Personal:** Born 1946, Buffalo, N.Y. ... Married to Sally ... One child.



## Barack Obama President of the United States

His signature health care reform program remains one of the biggest issues facing taxpayers, and is both a tremendous headache for accountants, and a significant opportunity.

**Career Highlights:** President of the United States, 2009-present ... U.S. Senator, 2005-2008 ... Illinois Senator, 1997-2004 ... Senior lecturer, University of

Chicago Law School, 1996-2004; professor of constitutional law, 1992-1996 ... Of counsel, Davis, Miner, Barnhill & Galland, 1996-2004; associate, 1993-1996 ... Director, Project Vote, 1992 ... Community organizer, Developing Communities Project, 1985-1988 ... New York Public Interest Group, 1984 ... Business International Corp., 1983

**Other Affiliations:** Founding board member, Public Allies ... Past Board member, Woods Fund of Chicago; Joyce Foundation; Chicago Annenberg Challenge; Chicago Lawyers' Committee for Civil Rights Under Law; Center for Neighborhood Technology; Lugenia Burns Hope Center.

**Education:** Harvard Law School, Cambridge, Mass., 1991, JD ... Columbia University, New York City, 1983, BA.

**Personal:** Born 1961, Honolulu ... Married to Michelle ... Two daughters.

**Twitter/Blog:** @BarackObama / www.barackobama.com



### Nina Olson National Taxpayer Advocate, IRS

While her role can often involve criticizing the IRS, of late Olson has frequently been warning anyone who will listen about the dire consequences to taxpayer service of underfunding the agency.

**Career Highlights:** National Taxpayer Advocate, IRS, 2001-present ... Attorney at law, 1997-2001 ... Founder and executive director, Community Tax Law Project, 1992-2001 ... Owner, Accounting, Tax & Information Services, 1975-1991.

**Other Affiliations:** Administrative Conference of the United States ... American College of Tax Counsel ... Past chair, Special Committee on Access to Legal Services, Virginia State Bar ... Past chair, American Bar Association Section of Taxation's Low Income Taxpayers Committee; Pro Se/Pro Bono Task Force of the ABA Tax Section's Court Procedure Committee ... Faculty, Harvard Kennedy School of Government Comparative Tax Policy and Administration Program ... Past adjunct professor, Georgetown University Law Center; Virginia Commonwealth University; College of William and Mary School of Law; University of Richmond School of Law.

**Education:** Georgetown University Law Center, 1994, Masters of Law in Taxation ... North Carolina Central School of Law, 1991, JD ... Bryn Mawr College, 1975, AB Fine Arts.

**Personal:** Born 1954, Philadelphia ... One child.

**Blog/Twitter:** <http://www.taxpayeradvocate.irs.gov/blog/> / @YourVoiceAtIRS



### Jody Padar CEO and principal, New Vision CPA Group

Every revolutionary needs a manifesto, and Padar published hers this year with the release of *The Radical CPA*, which lays out a blueprint for the "New Firm" she has been advocating as the future of the profession for several years.

**Career Highlights:** CEO and principal, New Vision CPA Group, 2006-present ... Associate, Tax Technology Group, Price Waterhouse, 1994-1995.

**Other Affiliations:** Author, *The Radical CPA: New Rules for the Future-Ready Firm* ... AICPA Practi-

tioners and Tech+ Steering Committee ... AICPA ... Maryland Association of CPAs ... Adjunct professor, Oakton Community College ... Founder and past president, Chicago QuickBooks Pro Advisor User Group.

**Education:** Northern Illinois University, 2005, MST ... Saint Mary's College, 1994, BBA.

**Personal:** Born 1972, Chicago ... Married to Christopher ... Two children.

**Twitter:** @jodypadarcpa



### Brian Peccarelli President, Tax & Accounting business of Thomson Reuters

As both a CPA and a lawyer, Peccarelli understands the needs of professional services providers, and his unit keeps producing a wide range of new tools and resources to help them perform better.

**Career Highlights:** President, Tax & Accounting business of Thomson Reuters, 2011-present; president, Workflow & Service Solutions, 2010-2011; president, corporate software, 2006; vice president and general manager, RIA Compliance, 2002; joined RIA/CLR, 1984.

**Other Affiliations:** AICPA ... American Bar Association ... Texas State Board of Public Accountancy. **Education:** Southern Methodist University, MBA ... Hamline University School of Law, JD ... Carthage College, BA Accounting and Business Administration.

**Personal:** Born 1960, Wisconsin ... Married to Jane ... Two children.



### Carl Peterson Vice president of small firm interests, AICPA

Peterson is racking up the frequent flyer miles, criss-crossing the country to take the institute's message out to the very small firms that are his particular interest — and bringing their concerns back with him.

**Career Highlights:** Vice president of small firm interests, American Institute of CPA, 2014-present ... Managing partner, Peterson, Peterson & Associates PLC, 1999-2014 ... Partner, Schmidt & Peterson Ltd. 1994-1999 ... Managing partner, C.G. Peterson & Associates Ltd. 1989-1994 ... Controller, Healey Ramm Co., 1985-1989 ... Staff accountant, Berc & Fox Ltd. 1985-1980

**Other Affiliations:** Chair, Minnesota State Board of Architecture, Engineering, Land Surveying, Landscape Architecture, GeoScience and Certified Interior Design ... Treasurer, Port Authority of the City of Rosemount, Minn. ... Chair, Legislative Affairs Committee, Minnesota Society of CPAs; trustee, MNCPA PAC.

**Education:** Kansas State University, 1980, BS BA/ Acctg.

**Personal:** Born 1958, Peoria, Ill. ... Married to Joan Peterson ... Three children.



### Jeff Phillips CEO, Accountingly

Phillips is leading a revolution in the way accounting firms recruit

staff — and just in time, too, as firms and accountants alike are discovering that the old way isn't serving anyone's needs.

**Career Highlights:** CEO, Accountingly, 2012-present ... Senior advertising sales executive, Snagajob, 2011 ... Global account manager, Monster.com, 2005-2011 ... Business development representative, American Express, 2003-2005 ... Campus Recruiting Team manager, Scient Inc., 2000-2001 ... Campus recruiter, Trilogy Software, 1998-1999.

**Other Affiliation:** Board, Greater Pensacola Chamber of Commerce ... Board, Fiesta de Five Flags ... Trustee, Episcopal Day School of Pensacola, Fla.

**Education:** Baylor University, 1998, BBA in Economics ... Southern Methodist University, 2007, MBA.

**Personal:** Born 1976 ... Married to Lacy Harrell Phillips ... Three children

**Blog/Twitter:** [accountingly.com/blog/](http://accountingly.com/blog/) / @jeffphilips\_



### Terri Polley President and CEO, Financial Accounting Foundation

It's been a busy time for Polley and the standard-setters she oversees: Besides drafting and releasing a new strategic plan for all three organizations, they're conducting a review of the Private Company Council in its third year — and lining up a successor for founding PCC chair Billy Atkinson, who will be stepping down at the end of the year.

**Career Highlights:** President and chief executive officer, Financial Accounting Foundation, 2008-present; executive director of advisory groups, FASB, 1999-2008; controller, FAF, 1990-1999; technical associate, FASB, 1987-1990 ... Senior accountant, Arthur Andersen, 1982-1987.

**Other Affiliations:** AICPA ... Connecticut Society of CPAs ... Chairman, Greater Norwalk Chamber of Commerce

**Education:** St. Francis College, 1982, BA Accounting and French

**Personal:** Born 1960, Brooklyn, N.Y. ... Married ... One son.

**Blog/Twitter:** From the President's Desk / FAFNorwalk.



### Michel Prada Chair, IFRS Foundation

Even as he conducts a regularly scheduled review of the effectiveness of the international standard-setter he oversees, Prada is also working to strengthen its position and to chart a course it can follow into the future — one that he hopes will see IFRS accepted everywhere in the world.

**Career Highlights:** Chair, IFRS Foundation, 2012-present ... Chair, Financial Markets Authority, France, 2003-2008 ... Chair, French securities regulator, 1995-2002 ... Chair, Credit d'Equipement des Petites et Moyennes Entreprises, 1988-1995 ... Budget director, Directorate of Public Accounting, Ministry of the Economy, 1985; director of accounting, 1978; joined, 1970 ... Inspector of finances, 1966-1970.

**Other Affiliations:** Past chair, Executive and Technical Committees, IOSCO ... Founding member, Financial Stability Board ... IFAC ... Past chair, International Valuation Standards Council.

**Education:** University of Law and Economics, Master's in Law ... National School of Administration, France, 1966 ... Institute of Political Studies of Bordeaux.

**Personal:** Born 1940, Bordeaux, France ... Married ... Five children.



### Terry Putney CEO, Transition Advisors

With his partner Joel Sinkin, Putney not only advises on a host of accounting firm mergers and acquisitions — he's also an inexhaustible source of valuable advice and information that he shares with practitioners across the country.

**Career Highlights:** CEO, Transition Advisors LLC, 2004-present ... Vice president, HRB Small Business Resources, H&R Block, 2002-2004; Senior managing director of M&A, RSM McGladrey, 2001-2002; Vice-president of M&A, HRB Business Services, 2000-2001; president, HRB Business Services, 1998-2000 ... Managing partner, Donnelly Meiners Jordan Kline, 1993-1998; partner, 1978-1998;

**Other Affiliations:** President, CPA Consultants Alliance ... Co-author, *CPA Firm Mergers & Acquisitions* ... AICPA ... Illinois CPA Society ... Florida Institute of CPAs ... University of Kansas Accounting/Information Systems Advisory Council ... Treasurer, Cornerstones of Care ... Past president, Plaza Rotary Club ... Board member and past president, Ozanam ... Past president, Milburn Country Club ... Past board member, Kansas City Ballet.

**Education:** College University of Kansas, 1978, BS Business-Accounting.

**Personal:** Born 1954, Kansas City, Mo. ... Married to Mary ... Two children.

**Blog:** [cpaconsultantsalliance.com/blog/](http://cpaconsultantsalliance.com/blog/)



### Jean Rogers CEO and founder, SASB

If you're wondering whether sustainability reporting is a real thing, consider this: In just five years, Rogers has created an internationally recognized organization with a staff of 35 and a budget of \$6.7 million to set the standards for it. It's not just a real thing — it's the future, and accountants will want to get on board.

**Career Highlights:** CEO and founder, Sustainability Accounting Standards Board, 2011-present ... Principal, Ove Arup and Partners Ltd., 2001-2011 ... Loeb Fellow, Harvard University, 1997-1998 ... Management consultant, Deloitte, 1993-1997 ... Environmental engineer, Montgomery Watson, 1990-1993.

**Other Affiliations:** Ex officio board member, SASB ... East Bay Agency for Children ... Loeb Fellowship Network.

**Education:** Harvard University, 1998 post-doctorate fellow ... Illinois Institute of Technology, 1989, PhD ... Manhattan College, 1986, BE, ME.

**Personal:** Born 1963, White Plains, N.Y. ... Married to Gary Cox ... One child.



## Q&amp;A

## The value of mentors

When we asked the T100 if they'd ever had a mentor, we didn't expect the overwhelming response: Only eight hadn't had one, and the vast majority of the rest reported more than one — and often many more. Senior firm partners and other professional mentors were the most frequently cited, but college professors were common, as were fathers, including many who were CPAs or entrepreneurs.

"Too many to mention" was a regular refrain, and Karen Abramson explained the range of mentors available: "Whether it was an executive early on who gave me the business savvy and perspective to help me reach my full potential, or some of our Millennial staff who have provided fresh thinking and new ways of looking at things — mentorship can come in many forms and from many people."

Not all of Jason Marx's mentors knew it: "Some of them knew they were mentors and willingly shared their guidance, expertise and experience; with others, I was able to study from a distance and take away the key lessons — good and bad."

But most are fully conscious of their role: "The CPA profession is built on a foundation of mentoring — an older, more experienced person guides, teaches, coaches a younger, less experienced person," explained Rita Keller. "It is how accountants have been passing along their skills and expertise for decades. Sometimes, I think they forget they are actually mentoring!"

They may forget that they're mentoring, but they are never forgotten. Sandy Johnson described meeting her peers at the National Conference of CPA Practitioners: "I was surrounded by my peers and discovered a group of people willing to share what they knew with their competitors and friends. ... While they did not know it, this group of CPAs became my mentors. They taught me to be a better CPA. They taught me to be a better businesswoman. And as I rose through the ranks at NCCPAP, they taught me to be a leader. I am eternally grateful to this group of wonderful men and women."

To learn about the mentors of all the T100 candidates, visit [AccountingToday.com](http://AccountingToday.com).



### Darren Root President and CEO, RootWorks

Root has a vision of CPA firms that work smarter, not harder, to give their owners and staff something much more meaningful than mere "work-life balance" — and he's getting the word out through articles, books, countless speaking engagements and presentations, and his own high-tech consulting practice.

**Career Highlights:** CEO, RootWorks, 2006-present ... Executive editor, *CPA Practice Advisor*, 2008-2014 ... President, Root & Associates, 1985-present.

**Other Affiliations:** Publisher, *CPA Life* Magazine ... Past member, CTP Credential Committee, AICPA ... Past board member, INCPAS ... Author, *The Intentional Accountant* ... Co-Author, *YOUtility for Accountants*; *The E-Myth Accountant* ... Founder, Thomson Reuters Partner Summits ... Past director, Bloomington Hospital Foundation ... Past chairman, Bloomington United Way Campaign ... Guest lecturer, Indiana University School of Business ... Sherwood Oaks Christian Church ... Director, German American Bancorp.

**Education:** Indiana University, 1984, B.S., Accounting.

**Personal:** Born in Bloomington, Ind. ... Married to Michelle ... Three children.



### Marc Rosenberg President, The Rosenberg Associates

His authoritative MAP survey is one of the most reliable guides to where firms have been and where they're going, while his ongoing monograph series is illuminating every corner of the modern accounting practice.

**Career Highlights:** President, The Rosenberg Associates, 1994-present ... National director of management consulting, PDI, 1988-1994 ... Chief operating officer, Friedman, Eisenstein, Raemer & Schwartz, 1982-1988 ... Vice president of finance, International Division, Mark Controls Corp., 1974-1982 ... Senior auditor, Ernst & Ernst, 1970-1974.

**Other Affiliations:** Founder, The Rosenberg MAP Survey ... Author, *The Rosenberg Practice Management Monograph Series* (13 volumes); The Rosenberg Blog ... AICPA ... ICPAS ... Founding member, New Horizons Group ... Leader of three managing partner roundtable groups ... Fundraiser, Ron Santo Walk for the Cure for Diabetes; Chicago Board member-Jewish Student Connection.

**Education:** University of Illinois, Chicago, 1970, BS Accounting.

**Personal:** Born 1948, Chicago ... Married to Ellen ... Two children.

**Blog/Twitter:** <http://blog.rosenbergassoc.com> / @mrosenbergcpa



### Rep. Paul Ryan R-Wis.

As the new chair of the Ways & Means Committee, Ryan is, like

his counterpart in the Senate, Orrin Hatch, in a prime position to influence tax legislation — and he's proven in the past that he has a lot of ideas on the subject.

**Career Highlights:** Chair, House Ways & Means Committee, U.S. House of Representatives; chair, Budget Committee, 2011-present; elected 1998 ... Marketing consultant, Ryan Inc. Central, 1997 ... Legislative director, Sen. San Brownback, 1995 ... Speechwriter, Empower America, 1993 ... Legislative aide, Senator Bob Kasten, 1992.

**Other Affiliations:** House Republican Caucus ... Caucus of House Conservatives Republican Study Committee ... International Conservation Caucus ... Middle East Economic Partnership Caucus ... Sportsmen's Caucus ... Past member, National Commission on Fiscal Responsibility and Reform

**Education:** Miami University, 1992, BA Economics and Political Science.

**Personal:** Born 1970, Janesville, Wis. ... Married to Janna ... Three children.



### James Schnurr Chief accountant, SEC

In a series of public forums, Schnurr has re-opened a debate many had thought closed, over the possible use of International Financial Reporting Standards in the U.S.

**Career Highlights:** Chief accountant, Securities and Exchange Commission, 2014-present ... Vice chair and senior professional practice director, Deloitte, 2009-2014; MP, professional practice, 2002-2009; senior partner for M&A services, 1994-2002; partner, 1985; joined, 1975.

**Other Affiliations:** FASB ... Past member, Standing Advisory Group, PCAOB ... AICPA.

**Education:** Rutgers University, MBA ... College of the Holy Cross.



### Todd Shapiro President and CEO, ICPAS

Like Gary Bolinger in Indiana, Shapiro is turning his state into a hotbed of innovation, particularly in the area of education, where he has championed changes to decades-old models that are gaining ground across the country.

**Career Highlights:** President and CEO, Illinois CPA Society, 2013-present; CFO, 1998-2013 ... Director of financial planning and analysis, home and personal care USA, Unilever, 1992-1998 ... Director of finance, Pet Foods Division, Quaker Oats, 1982-1992.

**Other Affiliations:** President and CEO, CPAs for the Public Interest ... CPA/Society Executives Association ... FEI ... American Society of Association Executives ... Association Forum of Chicagoland ... Ex officio board member, CPA Endowment Fund of Illinois ... Accountancy Advisory Board, University of Illinois at Urbana-Champaign ... Future of Learning Task Force, AICPA; Peer Review Board ... Member and past president, Lyons Township High School Board of Education ... Past president, La Grange Park Library District.

**Education:** DePaul University, 1982, MBA ... University of Illinois at Urbana-Champaign, 1979, BS Finance.

**Personal:** Born 1957, Kankakee, Ill. ... Married to Leslie ... Two children.

**Twitter:** @ToddICPAS



### Joel Sinkin President, Transition Advisors

With his partner Terry Putney, Sinkin is a tireless educator on some very hot subjects: firm structure and value, succession planning and exit strategies, and M&A — and that's to say nothing of the countless firm mergers that their company consults on every year.

**Career Highlights:** President, Transition Advisors LLC, 2004-present ... President, J. Sinkin Consulting Group, 2003-2004 ... Division manager, GlobalForce International, 1990-2003.

**Other Affiliations:** Succession advisor, AICPA; editorial advisor, Small Firm Solutions; member, Editorial Review Board, *The CPA Journal* ... Co-author, *Buying, Merging CPA Firms*.

**Education:** SUNY Brockport, 1981.

**Personal:** Born 1958, Brooklyn, N.Y. ... Married to Kathy ... One son and one daughter.



### Doug Sleeter Founder, The Sleeter Group

Sleeter may have sold his trademark annual tech conference, but that has just freed him up from day-to-day logistics to focus on his real role of being a thought leader on the ways technology is changing accounting, and how accountants need to change in return.

**Career Highlights:** Founder, The Sleeter Group Inc., 1994-present, acquired by Diversified Communications in 2015 ... Director of product marketing, Quorum Software Systems, 1991-1994 ... Desktop Publishing and Accounting evangelist, Apple Computer, 1986-1991 ... Postscript evangelist, Adobe Systems, 1985-1986 ... Staff accountant and tax preparer, Stanley W. Dowling CPA, 1979-1982, and Charles Strahl CPA, 1978-1979.

**Other Affiliations:** Host, The Sleeter Group's Accounting Solutions Conference ... Board of Advisors, Bill.com ... Former product development and marketing consultant, Intuit, 1994-2006, SmartVault; Bill.com; Xero; MISys; Avalara; Agiliron; Zenpayroll; Backops ... Board member at two small nonprofits.

**Education:** Santa Clara University, MBA courses ... University of California at Santa Cruz, 1982, BA Computer and Information Sciences.

**Personal:** Born 1959, Fresno, Calif. ... Married to Sherrill ... One son.

**Blog/Twitter:** [www.sleeter.com/blog/](http://www.sleeter.com/blog/) / @dougslleeter @sleetergroup



### Brad Smith President and CEO, Intuit

Under Smith, Intuit has risen to the challenge posed by a host of new online challengers, amping up its presence in the cloud and more deeply engaging with its users through events like the new QuickBooks Connect.

**Career Highlights:** President and CEO, Intuit Inc., 2008-present; senior vice president and general manager, Small Business Division, 2006-2007; general manager, QuickBooks Group, 2005-2006; leader, Consumer Tax Group, 2004-2005; vice president and general manager, Accountant Central and Developer Network; joined, 2003 ... Senior vice president of marketing and business development, ADP ... Various sales, marketing and management positions, Pepsi, Seven-Up, Advo Inc.

**Education:** Aquinas College, Master's of Management ... Marshall University, BBA.

**Twitter:** @IntuitBrad



### Jamie Sutherland

General manager,  
U.S. Products & Solutions,  
Xero

With a personal flair for entrepreneurship — he once launched his own taxi-hailing app — Sutherland has been the driving force behind Xero's explosive entry into the U.S. market, and all the positive disruption that has come with it.

**Career Highlights:** General manager, U.S. products & solutions, Xero Inc., 2015-present; president, Xero U.S., 2011-2015 ... Vice president and general manager, Sage Software, 2008-2011; senior director and general manager, 2008-2009; director of strategic marketing, 2007-2008 ... International associate, Leadership Rotational Program, Scotiabank, 2007 ... Senior analyst, Investor Economics, 2005-2007 ... Territory manager, Suncor Energy, 2003-2004; marketing specialist, 2001, online marketing analyst, 2000.

**Other Affiliations:** Board member, Canadian Organization for Development through Education Foundation ... Charter member, C100 ... Co-founder and board director, TaxiNow ... McGill University MBA Mentor Program ... MBA Advisor, Royal Roads University.

**Education:** York University, Schulich School of Business, MBA, 2007 ... McGill University, 1997, Bachelor of Commerce, Finance & International Business.

**Personal:** Born 1974, Oakville, Ont. ... Married to Michelle Zadlyn.

**Blog/Twitter:** blog.xero.com / @sutherlandjamie



### Rick Telberg

Founder and CEO,  
CPA Trendlines

Besides his own insights and those generated by the research arm of CPA Trendlines, Telberg has emerged as a major impresario for new thought leaders (including some of our T100), ushering them into the spotlight through both his Web site and his book publishing operation.

**Career Highlights:** President and CEO, CPA Trendlines, 2004-present ... Founder, president and CEO, Bay Street Group LLC, 2004-present ... Editorial director, director of online content, editor-at-large, CPA2Biz, 2001-2011 ... Vice president and senior editorial director, SmartPros, 2000-2001 ... Vice president, group publisher, editorial director, and editor-in-chief, *Accounting Today*, Thomson Reuters, 1991-2000.

**Other Affiliations:** Association for Accounting Marketing ... IBM Small Business Advisory Board ... Hewlett-Packard Accounting Industry Panel of Influencers ... National Society of Accountants.

**Education:** City University of New York-Baruch, Corporate Finance, 1983 ... New York University, New York City, 1978, Bachelor's.

**Personal:** Born 1956, New York City.

**Twitter:** @cpa\_trendlines



### Arleen Thomas

Senior vice president  
of management  
accounting and global  
markets, AICPA

It may be an American institute, but Thomas' beat is global, and she spends a great deal of time traveling the world building and promoting the young Chartered Global Management Accountant designation, which this year transitioned from its grandfathered phase with the launch of its first exam.

**Career Highlights:** Senior vice president of management accounting and global markets, American Institute of CPAs, 2012-present; senior vice president of member competency and development, 2005-2012; VP of professional standards and services, 1997-2005; VP of SEC Practice Section and self-regulation, 1995-1997; director of accounting standards, 1992-1995 ... Senior manager, audit, KPMG, 1983-1992.

**Other Affiliations:** Chair, XBRL International Inc. ... Consistory of the Reformed Church of Bronxville.

**Education:** Metropolitan State University, 1983, BA Accounting.

**Personal:** Born 1960, Denver ... Married to Steven ... Two children.

**Twitter:** @ArleenCPA



### Ralph Thomas

CEO and executive  
director, NJCPA

Thomas' is a respected voice on many of the issues that currently matter most to the profession, with a particular emphasis on diversity and inclusion.

**Career Highlights:** CEO and executive director, New Jersey Society of CPAs, 1999-present ... Vice president, Structured Products Group, Citibank, 1987-1999 ... Staff manager, American Bell and AT&T Information Systems, 1982-1987 ... Senior systems accountant, Potomac Electric Power Co., 1980-1982 ... Senior accountant, Price Waterhouse, 1977-1980.

**Other Affiliations:** Member, American Institute for CPAs Foundation Board; past member, AICPA National Committee on Diversity and Inclusion, Strategic Planning Committee, Council, AICPA Group of 100, Pre-Certification Education Executive Committee; Peer Review Executive Committee Board, and CPA Vision Project ... Past member, CPA/SEA Board ... Member, State Society Network Inc., Shared Services LLC ... Lifetime member and past national president and corporate advisory board member, National Association of Black Accountants ... Trustee and former chair, Diversity and Inclusion Subcommittee, Lehigh University; member, Lehigh University Audit Committee and College of Business Dean's Advisory Council ... Member, Accounting Advisory

## Melancon wins again

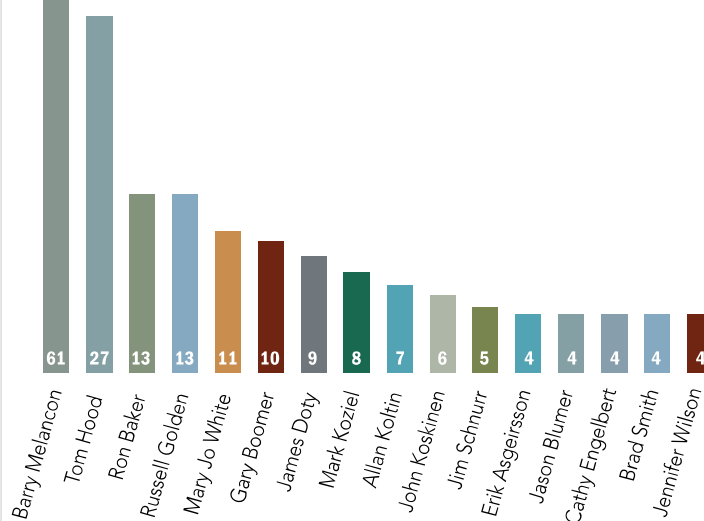
We have to make this chart bigger every year.

Usually it's because when we ask candidates for the T100 who they think are the three most influential people in accounting, American Institute of CPAs' president and chief executive Barry Melancon gets way more votes than anyone else.

And this year was no different — more than half of our respondents named Melancon among their three, citing the breadth and depth of his knowledge about the profession, his communication skills, and the way he is leading accounting into the future. For all those, he stands more or less alone at the top of the list.

Where things got interesting this year was just below that, with both Maryland Association of CPAs chief Tom Hood and value-pricing philosopher Ron Baker jumping significantly up the list. Both are high-profile communicators with strong visions, so their rise is not as surprising as the drop of Securities and Exchange Commission chair Mary Jo White, who resonated much less with the T100 this year than last.

New to this group were Deloitte's Cathy Engelbert, who became one of the first women to helm a Big Four accounting firm this year (along with KPMG chief Lynne Doughtie, who also got a couple of votes), and Thriveal Networks founder Jason Blumer, who keeps busy serving as an example of what a 21st century practice can be.



Of 115 responses



Boards, Lehigh, Rutgers, Seton Hall and Montclair State Universities and Thomas Edison State College ... Member, NASBA State Society Relations Committee ... New Jersey State Chamber of Commerce Cornerstone Group ... Chair, Audit Committee, Shiloh Baptist Church.

**Education:** Lehigh University, 1977, MBA; 1976, BS Business & Economics

**Personal:** Born 1954, Washington, D.C. ... Married to Valerie ... One daughter.



## Jeffrey Thomson President and CEO, IMA

Thomson has seen another record year of growth at the IMA, with a renewed emphasis on innovation, boosting its CMA credential — and fending off the AICPA's rival CGMA credential.

**Career Highlights:** President and CEO, Institute of Management Accountants, 2008-present; vice president of research and applications development, 2005-2008 ... Teacher, Mount Olive Township High School, 2002-2005 ... Chief financial officer of business sales, AT&T, 1979-2002.

**Other Affiliations:** Voting member, International Integrated Reporting Council ... Past board member, Committee of Sponsoring Organizations of the Treadway Commission; County Social Services for the Mentally Challenged Education.

**Education:** Executive education programs, Wharton School of Business for Finance and Accounting; Columbia Business School; MIT Sloan School of Business ... Montclair State University, MS Mathematics and Statistics; BS Mathematics.

**Personal:** Born 1955, Paterson, N.J. ... Married to Harriett ... Three children.

**Blog/Twitter:** @IMAJeffThomson / CEO blog <http://linkupima.com>



## David Vaudt Chairman, GASB

When it comes to setting standards, GASB under Vaudt is a veritable machine, with a steady pipeline at all stages of the process, to say nothing of a new strategic plan, and a revised GAAP hierarchy for state and local governments.

**Career Highlights:** Chairman, GASB, 2000-present ... State auditor, Iowa, 2003-2013 ... Audit partner, KPMG, 1976-2001.

**Other Affiliations:** AICPA ... AGA ... GFOA ... Iowa Society of CPAs ... Past chair, National Association of State Boards of Accountancy

**Education:** Upper Iowa University, 1976, BA Acctg.

**Personal:** Born 1953, Iowa. ... Married.

**Twitter:** @FAFNorwalk



## Amy Vetter Global vice president of education and head of accounting, USA, Xero

Vetter boasts a cloud accounting pedigree that's second to none, so when she touts the capability of the technology to turn ac-

countants into "Connected Advisors," people listen.

**Career Highlights:** Global vice president of education and head of accounting, USA, Xero, 2014-present ... Senior CPA Programs Leader, Intacct, 2011-2014 ... Key accounts manager, Southeastern Region, Intuit, 2009-2011 ... President, Technology in a Box/AV Accounting Services, 2001-2010 ... Senior financial analyst, Ryder Systems, 1999-2001 ... Senior accountant, KPMG, 1996-1999.

**Other Affiliations:** AICPA; Technology Advisory Panel, *Journal of Accountancy* ... NAPW ... Intuit Trainer/Writer Network, 2006-2011 ... Yoga Alliance ... Managing member, Drishti Yoga.

**Education:** Nova Southeastern University.

**Personal:** Born 1974, Los Angeles ... Married ... Two boys.

**Blog/Twitter:** [www.thedrishtiqcpa.blogspot.com/](http://www.thedrishtiqcpa.blogspot.com/) / @amyvettercpa



## Jennifer Warawa Global vice president of product marketing, Sage

Her new title may be global, but her mission is in the cloud: showing accountants how Sage's raft of new online tools can transform their practices.

**Career Highlights:** Global vice president of product marketing, Sage, 2015-present; vice president and general manager, Sage Accountant Solutions, Sage North America, 2013-2015; vice president of partner programs & channel sales; joined, 2008... Owner and operations manager, Dreamscape Business Services Ltd., 1995-2008.

**Other Affiliations:** Volunteer, Information Technology Alliance... Family Promise Volunteer ... Past board member, Courage for Youth Association ... Founder and past board member, Uptown Rutland Business Association ... Team captain, Sage's American Cancer Society Relay for Life team, 2013 and 2014.

**Education:** Harvard Business School Executive Education, 2012 ... Okanagan University College, 1997.

**Personal:** Born Kelowna, B.C. ... Married to Shane.

**Blog/Twitter:** [www.jenniferwarawa.com/](http://www.jenniferwarawa.com/) / [www.virgin.com/author/jennifer-warawa/](http://www.virgin.com/author/jennifer-warawa/) / @jenniferwarawa



## Mary Jo White Chair, SEC

Under White, the commission has been busy protecting whistleblowers, requiring greater executive compensation disclosure, and scrutinizing audit committee disclosures. At the same time, it has restarted a debate over IFRS in the U.S. that many had thought was over ...

**Career Highlights:** Chair, Securities and Exchange Commission, 2013-present ... Chair, Litigation Department, Debevoise & Plimpton, 2002-2013; litigation partner, 1983-1990; associate, 1976-1978 ... U.S. Attorney for the Southern District of New York, 1993-2002; acting U.S. attorney for the Eastern District of New York, 1992-1993; first assistant U.S. attorney; chief appellate attorney, Criminal Division; assistant U.S. attorney for the Southern District of New York, 1978-1981.

**Other Affiliations:** Fellow, American College of Tri-

al Lawyers; International College of Trial Lawyers ... Past board member, Nasdaq ... Council on Foreign Relations.

**Education:** Columbia Law School, 1974, JD ... New School for Social Research, 1971, MA in Psychology ... College of William & Mary, 1970, BA.

**Personal:** Born 1947, Kansas City, Mo.



## Sandra Wiley Shareholder and chief talent innovator, Boomer Consulting

As the profession struggles with an epic staffing crunch, Wiley's expertise on topics like recruiting, retention and talent management is much in demand.

**Career Highlights:** Shareholder and chief talent innovator, Boomer Consulting Inc., 1995-present ... Vice president of human resources, FirstBank, 1989-1994 ... Financial analyst, First Interstate Bank, 1979-1988.

**Other Affiliations:** Author, *The Engaged Employee* (Fall 2015); *The Journey Ahead: A New Roadmap To Collaboration in Your Firm* ... Chairman, CPA Consultants Alliance ... Member, AT Advisory Group ... Creator, The P3 Leadership Academy... Creator, The CEO Advantage Program...Team member, The Advisory Board ... Past committee member and marketing leader, Tech+ Conference Committee, AICPA ... Guest lecturer, Kansas State University ... Co-publisher, *Performance3* ... Board president and campaign chair, United Way of Riley County ... Executive board member, Manhattan High School Site Council ... Board member, Manhattan Crisis Center ... Youth director, Trinity Presbyterian Church.

**Education:** Friends University, 1990, BS Human Resources.

**Personal:** Born 1960, Stafford, Kan. ... Married to Doug ... Three children.

**Blog/Twitter:** [www.ThinkPlanGrow.net/](http://www.ThinkPlanGrow.net/) / @sandra-wiley



## Jennifer Wilson Co-founder and owner, ConvergenceCoaching

Few people are as willing as Wilson to tackle the thorniest problems facing individual firms — from dysfunctional partnerships to the lack of leadership — and even fewer have the wisdom and experience she brings to solving them.

**Career Highlights:** Co-founder and owner, ConvergenceCoaching LLC, 2000-present ... Co-founder and principal, Success Strategists, 1999-2000; 1995-1997 ... National director, Financial Solutions Group, BDO Seidman, 1997-1999 ... Vice president of sales and customer services, State of the Art Inc., 1989-1995 ... Regional sales manager, Pro Systems Inc., 1984-1988.

**Other Affiliations:** Founding member, CPA Consultants' Alliance ... New Horizon Group ... Past Chair, Education Committee, Association for Accounting Marketing ... Association for Accounting Administration ... CPA Leadership Panel ... Digital CPA Planning Committee; Past chair, Tech Committee, AICPA; Workload Compression Task Force ... American Marketing Association ... Society for Human Resource Management ... International Coach Federation...

AICPA ... Founding member and board member, Information Technology Alliance ... Board and youth leader, Episcopal Church.

**Education:** University of Nebraska, 2002, BS Marketing ... Landmark Education, Curriculum for Living (Leadership/Communications), 1995-1996.

**Personal:** Born 1964, Hahn Air Force Base, Germany ... Married to Brian ... Three daughters.

**Blog/Twitter:** [www.blog.convergencecoaching.com/](http://www.blog.convergencecoaching.com/) / @JenLeeWilson



## Joe Woodard CEO, Woodard Companies

His flagship annual conference continues to be a must-attend event, while Woodard himself cements a reputation as an educator and thought leader in the space where accountants, technology and small businesses meet.

**Career Highlights:** Host, Scaling New Heights, 2008-present; host, Woodard Network ... CEO, Woodard Consulting, 2003-present ... Intuit contracted writer, trainer and event producer 2003-present ... Vice president of instruction, Sleeter Group, 2000-2003.

**Other Affiliations:** Intuit Premier Reseller ... Intuit Writer/Trainer Network ... QuickBooks ProAdvisor Program,

**Education:** University of New Orleans, 1997-1999, graduate studies in Accounting ... Mercer University, 1990, BA Classical Greek.

**Twitter:** @joewoodard



## Sen. Ron Wyden D-Ore.

Wyden has proved himself a fount of ideas on the tax front, introducing lots of legislation on tax-related topics ranging from the treatment of same-sex married couples to the tax breaks available to reinsurers. Not much has gone very far, it's true, but he and a few of his colleagues from the other side of the aisle are at least keeping the debate over tax reform alive. Maybe when the air clears after the election ...

**Career Highlights:** U.S. Senate, 1996-present; past chair and ranking member, Finance Committee; chair, Joint Committee on Taxation; past chair, Committee on Energy and Natural Resources ... U.S. House of Representatives, 1981-1996 ... Director, Oregon Legal Services for the Elderly, 1977-1979; member, Oregon State Board of Examiners of Nursing Home Administrators, 1977-1979 ... Gerontology professor, several Oregon universities.

**Other Affiliations:** Founder, Oregon Chapter, Gray Panthers ... Congressional Coalition on Adoption ... Congressional Fire Services Caucus ... Congressional Internet Caucus ... International Conservation Caucus ... Renewable Energy and Energy Efficiency Caucus ... Senate Diabetes Caucus ... Senate Economic Mobility Caucus ... Senate Oceans Caucus

**Education:** University of Oregon School of Law, 1974, JD ... Stanford University, 1971, BA.

**Personal:** Born 1949, Wichita, Kansas ... Married to Nancy ... Five children.