

# The Top 100 Most Influential People in Accounting

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The first thing to know is that this isn't an award.

Though its members are often praiseworthy, being named to the Top 100 Most Influential People in Accounting list is not in itself meant as praise — rather, it's what we hope is a clear-eyed assessment by our editors of the individuals who are having the biggest impact on the current state and the future direction of the profession.

The second thing to know is that it's not big enough. In the two decades we have been compiling this list, accounting has grown into new areas, attracted new regulators, come to use new tools, and developed new skills. All of that means new areas of influence, and new influencers. Every year we need to balance them all, measure their current levels of influence and make difficult, often unfair choices. Moving off the list does not necessarily mean someone is no longer a player; and in fact, many members return.

The third thing to know is that this year's roster may be one of the most influential ever. The changes currently under way in the profession are so significant that the decisions they make now and in the coming years and months will have repercussions that will be felt for decades to come.

With that sobering (but also hopeful) thought, welcome the 2018 Class of the Most Influential People in Accounting!





## Joe Adams

### Managing partner and CEO, RSM US

*Closing in on \$2 billion in revenue, Adams' RSM remains focused on developing new resources to serve the middle market, but without losing sight of the need to develop its people to their highest potential.*

Career Highlights: Managing partner and CEO, RSM US, 2011-present; regional managing director, Great Lakes Region, 2008-2011; audit partner, 1987; joined, 1971.

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

Education: DePaul University, Chicago, MBA Operations Management; BA Acctg.

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



**Alan Anderson****President, Accountability Plus**

*A long-time leader in the audit space, Anderson has his fingerprints all over the future of this core service, from leading programs on incorporating big data and analytical tools, to helping design CPA.com's recently released prep, comp and review tool.*

Career Highlights: President, Accountability Plus, 2010-present ... Founder, Leadership Leagues, 2017-present...Principal, LarsonAllen, 2007-2010 ... Senior VP, Franklin Templeton Investments, 2005-2007 ... Senior VP, AICPA, 1997-2005 ... Partner, McGladrey & Pullen, 1979-1997.

Other Affiliations: CPA.com.

Education: Southwest Minnesota State University, BS Acctg.

Personal: Born 1955, Canby, Minn. ... Two children.

**August Aquila****President and CEO, Aquila Global Advisors**

***Through the sort of practice management wisdom that can only come from long years of experience, Aquila is dedicated to helping his many accounting firm clients move to the next level.***

Career Highlights: President, Aquila Global Advisors LLC, 1995-present ... Director of practice management consulting, The Growth Partnership, 2003-2005 ... VP of M&A, American Express Tax & Business Services, 1996-2003; VP of field management, 1994-1996 ... Senior VP, Practice Development Institute, 1987-1994 ... Partner, Friedman, Eisenstein, Raemer & Schwartz CPAs, 1985-1994 ... Group director of marketing, Coopers & Lybrand (Chicago Group), 1979-1983.

Other Affiliations: Founding board member, Association for Accounting Marketing ... Author, "What Makes a Great Partnership;" "How to Become the Firm of Choice;" "Price It Right: How to Value Accounting Services;" "CPA Firm Merger Strategies That Work;" "CPAs That Sell;" "Client at the Core: Marketing and Managing Today's Professional Services Firm;" "Compensation as a Strategic Asset;" "Leadership at Its Strongest: What Successful Managing Partners Do;" "How to Engage Partners in the Firm's Future" ... Associate member, AICPA.

Education: Indiana University, Ph.D ... DePaul University, MBA, BA.

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

Twitter: @aquilaadvisors



**Erik Asgeirsson**  
**CEO, CPA.com**

***For years a major proponent of the importance of technology to accountants, of late Asgeirsson has also been leading the way in building the technology of the future, from the Rivio clearinghouse to this year's OnPoint PCR tool.***

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.

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

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

Twitter: @erikasgeirsson



### **Ron Baker**

**Founder, VeraSage Institute; chief value officer, Armanino**

***Whether you call him the godfather of value pricing or its inventor, there can be no doubt that Baker laid down its philosophical underpinnings long ago, and is finally seeing his hard work pay off as his ideas bear fruit across the profession.***

Career Highlights: Founder, VeraSage Institute, 1998-present ... Chief value officer, Armanino LLP, 2018-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 ... CalCPA ... Author, "The Soul of Enterprise: Dialogues on Business in the Knowledge Economy;" "Implementing Value Pricing;" "Mind Over Matter;" "Pricing on Purpose;" "Professional's Guide to Value Pricing, 6th Edition;" "The Firm of the Future;" "Burying the Billable Hour;" "Trashing the Timesheet" ... Faculty member, Professional Pricing Society ... Cato Institute ... Heritage Foundation ... American Enterprise Institute.

Education: San Francisco State University, 1984, BS Accounting ... Santa Rosa Junior College, 1982, AA.

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

Twitter: @ronaldbaker



### **Jon Baron**

**Managing director, Professional Segment, Thomson Reuters Tax & Accounting**

*Few software execs have Baron's long history of delivering valuable tools to accountants, and with Thomson Reuters investing in exploring the frontiers of AI, blockchain and other new tools, he looks set to provide value deep into the future.*

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; EVP, accounting market, and president and CEO, Creative Solutions, 2004-2005; president and CEO, Thomson Reuters/Creative Solutions, 1998-2004; VP of product development, 1992-1998

... VP of product development, national customer training and Western regional support, CCH, 1980-1992.

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

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



### **Joanne Barry**

#### **Executive director and CEO, NYSSCPA**

***As head of one of the largest and most influential state societies, Barry is a major voice for strong professional education, vigilance in maintaining accounting's integrity in its public service role, and more inclusion for women and minorities.***

Career Highlights: Executive director and CEO, New York State Society of CPAs, 2010-present; executive director, Foundation for Accounting Education, 2010-present; executive director, Moynihan Scholarship Fund, 2017; publisher, "The CPA Journal;" deputy executive director, 2008-2009; managing director of communications, 2006-2008; director, Communications Division, 1986-1989; assistant director of PR, 1981-1986. ... Assistant director of public information and publications editor, Hackensack Medical Center, 1980-1981 ... PR, New York City School Volunteer Program, 1977-1981.

Other Affiliations: American Society of Association Executives ... President, 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 ... Past chair, AICPA PR Conference.

Education: New School for Social Research, MS ... Montclair State University, BA.

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



**Wayne Berson**

**CEO, BDO USA**

***Under Berson, BDO has gone from strength to strength, continuing to expand both organically and through M&A and firmly entrenching itself among the elite cadre of billion-dollar firms.***

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

Other Affiliations: Board member, Center for Audit Quality ... Co-founder, BDO Institute for Nonprofit Excellence ... Past member, PCPS Executive Committee, AICPA ... Past president, Greater Washington Society of CPAs.

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



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



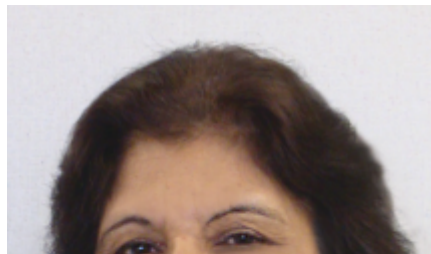
**Chandra and Sharada Bhansali**  
**Co-founders, AccountantsWorld**

*Double acts are rare in business, but you will find few partnerships as close as this husband-and-wife team, who have been inseparable in building both their company and their vision of a cloud-based profession — they're so close, in fact, that we're combining their entries, since their accomplishments and their vision are fully shared between them.*

**Chandra Bhansali**

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: State University of New York, 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.

Twitter: @cbhansali

### **Sharada Bhansali**

Career Highlights: President and co-founder, AccountantsWorld, 1984-present.

Other Affiliations: Director, Will & Vision Foundation.

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

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





## Ken Bishop

### President and CEO, NASBA

*Even as he works on a day-to-day basis to strengthen his association and its ability to serve its constituents, Bishop is also asking the big questions about the shape of the profession going forward, and what it needs to do maintain the CPA credential as a going concern.*

Career Highlights: President and CEO, National Association of State Boards of Accountancy, 2012-present; EVP, COO, 2010-2011; senior VP and director, 2007-2010 ... President and CEO, Professional Credential Services, 2007-2010 (former NASBA subsidiary) ... 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 ... Current member, Vanderbilt University MAcc Advisory Board ... Board, The PhD Project; Nashville Downtown Partnership.

Education: University of Missouri, Master's in Criminal Justice; Bachelor's in Education ... Federal Criminal Justice Academy ... Missouri State Highway Patrol Academy.



**Gary Boomer****Visionary and strategist, Boomer Consulting Inc.**

*Boomer's combination of longevity with vast experience in the field has yielded tremendous wisdom on everything from practice management to his signature field of technology — and he shares that wisdom, as he always has, with thousands and thousands of accountants every year.*

Career Highlights: Visionary and strategist, Boomer Consulting Inc., 2016-present; CEO, 1996-2016 ... Partner, Varney & Associates, to 1996.

Other Affiliations: AICPA Council; past chair, Life Insurance/Disability Plans Committee; past chair, IT Executive Committee; member, CPA Horizons 2025 ... Accounting Advisory Board, Kansas State University ... The Advisory Board ... Co-founder, Winning Is Everything Conference ... Past president, Kansas Society of CPAs.

Education: Kansas State University, BS & MS Acctg.

Personal: Married to Mary ... Three children.

Twitter: @lgboomer

**Jim Boomer****CEO and shareholder, Boomer Consulting Inc.**

*Heading one of the top consulting teams in the profession, Boomer brings his own deep*

***experience to helping firms improve in a range of areas, starting in technology but extending to practice management, new service areas, HR issues and more.***

Career Highlights: CEO and shareholder, Boomer Consulting, 2006-present ... Consultant, BearingPoint, 2002-2004 ... Senior consultant, Arthur Andersen Business Consulting, 1999-2002.

Other Affiliations: AICPA; Chair, Conference Steering Committee, AICPA Tech+ ... Kansas Society of CPAs; immediate past chair, Executive Committee.

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

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

Twitter: @jimboomer



**Jim Bourke**

**Partner, WithumSmith+Brown**

***Bourke's passion for technology and all that it can do for accounting firms is literally worldwide, as he travels the country and the globe evangelizing for the tech-enabled move to more advisory services — all while maintaining a full-time practice at a high-powered firm.***

Career Highlights: Partner-in-charge of firm technology, managing director of advisory services, Firm Executive Committee member, WithumSmith+Brown; joined, 1987.

Other Affiliations: Past president, New Jersey Society of CPAs ... Past member, Board of Directors, Council, AICPA; past chair, CITP Credential Committee; chair, AICPA Engage 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



**Rep. Kevin Brady**

**R-Texas**

***As one of the triumvirate of Republican congressional leaders who pushed through the passage of the Tax Cuts and Jobs Act, Brady's influence will be felt for years to come.***

Career Highlights: Chair, Ways & Means Committee; U.S. House of Representatives, 2015-present; chair, House-Senate Joint Economic Committee; elected, 1996 ... Texas House of Representatives, elected, 1990 ... Beaumont (Texas) Chamber of Commerce ... Rapid City Common Council ... Rapid City Chamber of Commerce.

Other Affiliations: Army Caucus ... Congressional Missing and Exploited Children Caucus ... Congressional Rural Caucus.

Education: University of South Dakota, 1990, BA.

Personal: Born 1955, Vermillion, S.D. ... Married to Cathy ... Two sons.



### **Wesley Bricker**

#### **Chief accountant, SEC**

*Bricker has a keen eye for the details of public company reporting, speaking out on businesses' progress in adopting new accounting standards, as well as the issues raised by tax reform, and warning about potential "mischief" in non-GAAP reporting.*

Career Highlights: Chief accountant, Securities and Exchange Commission, 2016-present; deputy chief accountant, 2015-2016; professional accounting fellow, Office of the Chief Accountant, 2009-2011 ... Partner, PwC, 2011-2015; to senior manager, 1999-2009.

Other Affiliations: New York State Bar Association.

Education: American University Washington College of Law, 2007, LLB ... Elizabethtown College, 2000, BS.

Personal: Married ... Three children.

Twitter: @wes\_bricker





## Dawn Brolin

### CEO, Powerful Accounting

*Brolin is a role model for the firm leader of the future: tech-forward, innovative, flexible, and passionate about her practice, her people and the profession. What's more, she's always eager to share what she's learned with her peers, so they can follow in her footsteps.*

Career Highlights: CEO, Powerful Accounting LLC, 2011-present ... Partner, Anderson, Brolin & Coba CPAs LLC ... Partner, Unspoken, 2005-2011 ... Member, RKD Accounting Services, 1999-2005.

Other Affiliations: AICPA ... Association of Certified Fraud Examiners ... Connecticut Society of CPAs ... American Board of Forensic Accounting ... Partner, Tax Genius ... Treasurer, Jesse Lewis Choose Love Foundation.

Education: Eastern Connecticut State University, 2005, Master's; 1992, Bachelor's.

Personal: Born 1970, Manchester, Conn. ... Married to Kevin ... Two daughters.

Twitter: @dawnbrolin







## **Paul Caron**

**Publisher and editor-in-chief, TaxProf Blog**

*Even after his elevation to dean, Caron remains one of the most trusted voices on tax in the blogosphere, helping direct the conversation on multiple fronts.*

Career Highlights: Dean, Pepperdine University School of Law, 2017-present; professor 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, 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, LLM (Tax)... Cornell Law School, 1983, JD ... Georgetown University, 1979, AB.

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



**Richard Chambers****President and CEO, Institute of Internal Auditors**

***A prolific writer and speaker, Chambers not only brings leadership to internal auditors — he also brings visibility, a higher profile, and a strong sense of the value they offer businesses and markets.***

Career Highlights: President and CEO, Institute of Internal Auditors, 2009-present ... National practice leader, internal audit advisory services, PwC, 2004-2008 ... VP, IIA Learning Center and Research Foundation, 2002-2004 ... Inspector general, Tennessee Valley Authority Corp., 2000-2002 ... 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; auditor, 1976-1980 ... Accountant, Atlanta Health and Human Services, 1980-1981 ... Accountant, U.S. GAO, 1976 ... Internal auditor, Trust Company Bank, 1975.

Other Affiliations: Author, "Trusted Advisors: Key Attributes of Outstanding Internal Auditors;" "Lessons Learned on the Audit Trail" ... Board, COSO; IIRC ... Advisory Council, Georgia State University School of Accountancy ... Advisory Board, University of Alabama's Culverhouse School of Accountancy.

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

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

Twitter: @rfchambers



**Fayezul Choudhury****CEO, IFAC**

*With international issues — from tax competition to tariffs to the accounting habits of multinationals — looming ever-larger, Choudhury's influence at the center of a network of national accounting groups has only grown.*

Career Highlights: CEO, International Federation of Accountants, 2013-present ... To controller and VP of strategic resource management, World Bank Group, 1985-2011 ... Price Waterhouse, 1974-1985.

Other Affiliations: Treasurer, Partnership for Transparency Fund ... Past member, Standards Advisory Council, IASB ... Past chair, Global Steering Committee, International Forum of Accountability Development ... Past member, Public Interest Oversight Board ... ICAEW.

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

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

**David Cieslak****Chief cloud officer, RKL eSolutions**

*He may have merged his old practice into a Top 100 Firm, but Cieslak remains a voice accountants trust when it comes to learning about what new tools and new technologies will really mean for their day-to-day work.*

Career Highlights: EVP and chief cloud officer, RKL eSolutions, 2018-present ... Principal, Arxis Technology, 1994-2017 ... Partner, Cieslak, Boynton & Speakman CPAs, 1985-1994 ... Financial analyst, Associated Financial Corp., 1984-1985 ... Senior accountant, PwC, 1982-1984.

Other Affiliations: Past chair, Sage Business Partner Advisory Council ... Past chair, AICPA IT Executive Committee ... Past board member, Information Technology Alliance ... Past president, California CPA Education Foundation, 2000-2001 ... 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



## Jay Clayton

### Chairman, SEC

***With a goal of increasing the number of public companies in the U.S., while also making it easier to understand and to demonstrate compliance with SEC rules, Clayton is in a position to significantly affect the profession.***

Career Highlights: Chair, Securities and Exchange Commission, 2017-present ... To co-MP, General Practice Group, Sullivan & Cromwell, 1995-2017 ... Law clerk, Judge Marvin Katz, U.S. District Court for the Eastern District of Pennsylvania, 1993-1995.

Other Affiliations: American Bar Association ... Adjunct professor, University of Pennsylvania, 2009-2017 ... New York City Bar.

Education: University of Pennsylvania Law School, 1993, JD ... University of Cambridge, 1990, BA MA ... University of Pennsylvania, 1988, BSE.

Personal: Married to Gretchen.



### **Lauren Clemmer**

**Executive director, AAM**

*As ever-fiercer competition makes marketing more important for firms than ever, Clemmer has been ceaseless in her efforts to professionalize the function — from an expanding roster of resources and education, to salary surveys for marketing directors.*

Career Highlights: Executive director, Association for Accounting Marketing, 2015-present ... Marketing manager, Ciuni & Panichi Inc., 2007-2015 ... Marketing manager, Magnet, 2003-2005 ... Various sales and marketing roles in various industries.

Other Affiliations: American Society of Association Executives ... Fellowship Committee, Chagrin Falls United Methodist Church ... Women's Board, Boys and Girls Club Cleveland.

Education: Dickinson College, 1978, BA.

Personal: Born 1956, York, Pa. ... Married to Dennis ... Three daughters, two grandsons.

Twitter: @laurenclemmer



### **Gale Crosley**

**President, Crosley+Co.**

*Few consultants chart the shifting pathways to accounting firm growth as well as Crosley, who continually hones the advice she gives to practices across the country to help them thrive in uncertain times.*

Career Highlights: Founder and president, Crosley+Co., 2001-present ... EVP of sales and marketing, AnswerThink Consulting Group, 1998-2000 ... Founder and president, Synchrony Networks, 1995-1998 ... VP of marketing, VoiceCom Systems, 1994-1995 ... Director of marketing and senior director of sales, MCI, 1989-1994 ... To marketing manager, IBM, 1975-1987 ... Staff auditor, Price Waterhouse, 1973-1975 ... Staff auditor, Arthur Andersen, 1972-1973.

Other Affiliations: Advisory Board, "The 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: @gcrosley

**Loretta Doon****CEO, CalCPA**

*Doon is all about reaching out — to colleges and firms across her state, to non-CPA financial professionals, to minority groups and women, and more — which has not only extended her influence; it's also helped grow the society she heads to more than 45,000 members.*

Career Highlights: CEO, California Society of CPAs, CalCPA Education Foundation, 2006-present; COO, 2005-2006 ... Associate executive director, California Teachers Association, 1979-2005 ... Auditor, Ernst & Young, 1976-1979 ... Controller, North American Reassurance Life Service Co., 1974-1976.

Other Affiliations: Board member, Accounting Career Awareness Program of Northern California; Schwab Charitable Fund ... Advisory Board, Center for Financial Reporting and Management, Haas School of Business, U.C. Berkeley ... Financial Women's Association ... American Woman's Society of CPAs ... Ascend ... AICPA; past member, PCPS Executive Committee; past Council member.

Education: San Francisco State University, MA Education ... University of Hawaii, BA.





## Lynne Doughtie

### Chairman and CEO, KPMG

***With three-quarters of the Big Four helmed by women, the issue is no longer whether women can lead big firms, but where they'll take them, and in Doughtie's case, it's directly into the future, with big bets on AI, data analytics, and all the other tools and business models that are revolutionizing the field.***

Career Highlights: Chairman and CEO, KPMG, 2015-present; vice chair of 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, CAQ ... Board member, NAF ... Board member, LUNGeivity ... Board, Committee Encouraging Corporate Philanthropy ... Board, Catalyst ... Trustee, U.S. Council for International Business...Advisory Board, Pamplin College of Business, Virginia Tech ... AICPA.

Education: Virginia Tech, 1985, BS Acctg.

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





**Phil Drake****Founder and CEO, Drake Software**

*Besides supporting over 50,000 tax practices in filing tens of millions of returns, Drake is now also helping them branch out, having partnered with broker-dealer HD Vest to introduce them to the possibilities of financial planning.*

Career Highlights: CEO, Drake Software, 1977-present ... CEO, Drake Enterprises Ltd., 1976-present ... Teacher, Greenville County Schools, 1973-1976 ... Music and youth director, Rocky Creek Baptist Church, 1975-1976.

Other Affiliations: Board of Trustees, Western Carolina University ... Board of Directors, National Christian Foundation.

Education: Davidson College, 1973, BS Math.

Personal: Married to Sharon ... Three children, six grandchildren.

**William Duhnke****Chair, PCAOB**

***With an entirely new board, Duhnke has a clean slate on which to write his version of accounting oversight — and the profession is watching him carefully to see what it looks like.***

Career Highlights: Chairman, Public Company Accounting Oversight Board, 2018-present ... Majority staff director and general counsel, U.S. Senate Committee on Rules and Administration; majority staff director and general counsel, Senate Committee on Banking, Housing and Urban Affairs; Republican staff director and general counsel, Senate Committee on Appropriations; staff member, Senator Richard Shelby; 1995-2017 ... Presidential Commission on the Assignment of Women in the Armed Forces and Defense Base Closure and Realignment Commission, 1992-1995 ... To lieutenant, U.S. Navy, 1984-1991.

Education: Catholic University Columbus School of Law, 1996, JD ... University of Wisconsin at Madison, 1984, BA.

Personal: Born 1963, Wisconsin.



**Kimberly Ellison-Taylor**

**Immediate past chair, AICPA**

***While serving as chair of the institute and the association helped elevate her profile, Ellison-Taylor's infectious enthusiasm and tireless advocacy for the profession have ensured that she remains influential even after stepping down.***

**Career Highlights:** Global accounting strategy director for the financial and professional services industries, Oracle America, 2015-present; health and human services executive director, public sector industry solutions, 2004-2015 ... Chief information technology officer, public sector, Prince George's County, Maryland ... Information risk manager, KPMG, 1999-2001.

**Other Affiliations:** Immediate past chair, Association of International Certified Professional Accountants; AICPA ... Past chair, MACPA ... Alumni Board of Directors, University of Maryland Baltimore County.

**Education:** Loyola University Maryland, 1996, MBA Business Administration ... University of Maryland, Baltimore County, 1993, BA Information Systems Management.

**Personal:** Born 1970, Baltimore ... Married ... Two sons.

Twitter: @kellisontaylor



**Cathy Engelbert**

**CEO, Deloitte**

*While it's been reported that she wasn't nominated for a second term, Engelbert has already made a lasting impression, not just by being the first woman to lead a Big Four firm, but also*

***by helping Deloitte develop the tools of the future, from trailblazing audit solutions to artificial intelligence, to better ways to visualize and share data, and more.***

Career Highlights: CEO, Deloitte, 2015-present; CEO, Audit & Assurance, 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; manager, 1992-1994; staff auditor, 1986.

Other Affiliations: Chairman, Governing Board, Center for Audit Quality ... Chair, Catalyst ... CEO Roundtable ... Vice chair, Partnership for New York City ... Vice chair, Kennedy Center Corporate Fund Board ... AICPA ... 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.

Twitter: @cathyengelbert



**Jina Etienne**

**Director of diversity and inclusion, Grant Thornton**

***As head of the National Association of Black Accountants, Etienne was a strong voice for diversity — and now she gets a chance to make a difference on the ground, pursuing that agenda at one of the biggest firms in the country.***

Career Highlights: Director of diversity and inclusion, Grant Thornton LLP, 2018-present ... Co-founder and principal consultant, Etienne Partners, 2017-2018 ... President and CEO, National Association of Black Accountants, 2015-2017 ... Director of taxation, AICPA, 2011-2015 ... Managing member, Etienne & Associates LLP, 1993-2011 ... Senior tax manager, Touche Ross, 1988-1993.

Other Affiliations: Member, U.S. Advisory Committee, Xero ... Past member, PCPS Executive Committee, AICPA ... MACPA ... Past president, Women Business Owners of Montgomery County ... Past treasurer, past board member, Tahirih Justice Center.

Education: American University, MS Tax; 1989, BS BA Acctg.

Personal: Born 1967, Baltimore ... Married to Gerard ... Two sons.

Twitter: @misstaxcat



### **Kim Fantaci**

#### **President, CPAFMA**

***There's a revolution going on in the back offices of firms across the country right now, as they get more professional and better organized, and as their value is increasingly recognized — and Fantaci and her organization are playing a major role in that, bringing the tools, resources, education, best practices and community that firm administrators need to pursue the revolution.***

Career Highlights: President/executive director, CPA Firm Management Association, 1993-present ... President and CEO, Advanced Management Concepts, 1998-present; association

executive, 1990-1998.

Other Affiliations: AMC Institute ... AICPA PCPS ... National Society of Accountants to Cooperatives ... CPA Network Ohio ... Officer, Kettering Fairmont Athletic Boosters.

Education: University of Dayton, 1990, BS.

Personal: Born 1967, Dayton, Ohio ... Married to Todd ... Three sons.

Twitter: @kimfantaci



## George Farrah

Editorial director, Bloomberg Tax

***The twin bombshells of the Tax Cuts and Jobs Act and the Wayfair decision have accountants scrambling to understand these once-in-a-generation tax changes, and many of them are turning to Farrah and his crack team for guidance and explanations.***

Career Highlights: Editorial director, Bloomberg Tax, 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.



## Cindy Fornelli

### Executive director, CAQ

***The classic audit is in the midst of a rare makeover, and both statement users and accountants will be looking to Fornelli to see what the ramifications are, and to make sure that audits maintain their credibility with the markets.***

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, 1998-2004 ... Senior associate, Dechert LLP, 1996-1998 .... Fried, Frank, Harris, Shriver & Jacobson LLP, 1990-1996.

Other Affiliations: Washington, D.C., Bar ... American Bar Association ... Disclosure and Transparency Committee, International Corporate Governance Network ... Advisory Board, Ira M. Millstein Center for Global Markets and Corporate Ownership... Council of Institutional Investors Markets Advisory Council ... Audit & Risk Oversight Committee Advisory Council, NACD ... Advisory Board, John L. Weinberg Center for Corporate Governance.

Education: The George Washington University Law School, JD, 1990 ... Purdue University, 1985, BA.

Personal: Born 1960, Los Angeles.

Twitter: @cfornelli

**Brian Fox****Founder and president, Confirmation.com**

*Having created one of the first of the new generation of online audit solutions, Fox plays a major role in audit-related innovation, building up his own product while also working with CPA.com and the AICPA on other tools in the category.*

Career Highlights: Founder and president, Confirmation.com, 2000-present ... Co-founder and board member, Rivio.com, 2014-present ... Senior, Transaction Services Group, PricewaterhouseCoopers, 1998-1999 ... To senior, Audit Group, Ernst & Young, 1996-1998.

Other Affiliations: Adjunct professor, Vanderbilt University, 2012-2014 ... Task Force for the Future, AICPA ... SMU Masters of Accountancy Advisory Board ... Tennessee Society of CPAs ... Mentor, Nashville Entrepreneurship Center ... Nashville Capital Network Advisory Board ... Seven accounting technology patents.

Education: Vanderbilt University Business School, 2001, MBA Finance ... Southern Methodist University, 1996, BBA Acctg.

Personal: Born 1973, Nashville, Tenn. ... Married to Megan ... Five children.

Twitter: @brianfoxcpa







## J. Russell George

### Treasury Inspector General for Tax Administration

***We've said it before: No one keeps the IRS's feet to the fire the way George does, with a constant stream of intensely focused audits on every aspect of the service's performance, from taxpayer service issues to IT security questions, personnel practices and much, much more.***

Career Highlights: Treasury Inspector General for 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.



**Keri Gohman****President, Xero Americas**

***While Xero continually improves its features and expands its reach — recently acquiring Hubdoc, for instance — Gohman is also strongly aware of her accountant users' end goal: to have more time and better tools to serve their clients.***

Career Highlights: President, Xero Americas, 2016-present ... Executive vice president and general manager, Spark Business, Capitol One, 2013-2016; to senior VP, 2008-2013 ... Director, sales and support, Intuit, 2006-2008; director of global professional services business, 2004-2006 .. To senior leadership roles, GE Financial Assurance, 1998-2004.

Education: Lynchburg College, MBA.

Personal: Married ... Three children.

**Russell Golden****Chairman, FASB**

***Standing at the forefront of the huge changes in accounting standards that are coming into place right now — from revenue recognition to lease accounting and CECL — Golden has an impact not just on the profession, but on businesses everywhere.***

Career Highlights: Chairman, FASB, 2013-present; board member, 2010-2013; staff member, 2004-2013 ... Partner, Deloitte & Touche, 2001-2004; joined, 1992.

Education: Washington State University, 1992, BA Business & Acctg.

Personal: Born 1970, Alabama ... Married to Tracey ... One son.



### **Michelle Golden River**

#### **Owner, Fore LLC**

*Having honed her message about advanced pricing inside a Top 100 Firm, Golden River has now hung out her own shingle to share the word with firms everywhere, training them in the billing philosophy of the future.*

Career Highlights: Owner, Fore LLC, 2017-present ... Member/growth leader, KCoe Isom, 2013-2017 ... President, Golden Practices, 1999-2013 ... Marketing director, Husch & Eppenberger, 1998-1999 ... Marketing director, Williams Keepers, 1994-1998 ... Staff accountant, Comprehensive Care Corp., 1987-1993 ... Staff accountant, CooperVision, 1985-1987.

Other Affiliations: Senior fellow, VeraSage Institute ... Author, "Social Media Strategies for Professionals and Their Firms" ... Contributing author, "Bull's-Eye! The Ultimate How-To Marketing and Sales Guide" ... Past board member, Association for Accounting Marketing ... St. Louis Tax Assistance Program.

Education: Columbia College, 1996-1998 ... Irvine Valley College, 1988-1990 ... Santa Ana College, 1982-1984.

Personal: Born 1966, Long Beach, Calif. ... Married to Tracy ... Six children, two grandchildren.

Twitter: @michellegolden



### Kelly Grier

#### U.S. chair and MP, EY

***With Grier's installation in July, the Big Four officially have a majority of female leaders, but that milestone may be less on her mind than the task ahead of her: leveraging EY's investments in technology and training to keep the firm on the cutting edge.***

Career Highlights: U.S. chair and managing partner, EY, 2018-present; Americas Area managing partner, 2018-present; vice chair and Central Region MP, 2015-2018; Americas vice chair of talent, 2014-2015; to managing partner, Chicago office, 1991-2014.

Other Affiliations: Board of Governors, CAQ ... Council on Foreign Relations ... Board member, Partnership for New York City; Chicago Field Museum ... Trustee, Ravinia Festival; Skills for Chicagoland's Future ... Past member, National Advisory Council, U.S. Department of Commerce.

Education: St. Mary's College of Notre Dame, 1991, BA Acctg.

Personal: Born Avon, Minnesota ... Married to John ... One son.



**Angie Grissom****President, The Rainmaker Companies**

*As she regularly expands the range of training programs her organization offers, Grissom builds on Rainmaker's strong foundation as one of the foremost consultants to accounting firms on growth and business development, leadership, culture and practice management.*

Career Highlights: President, The Rainmaker Companies, 2013-present; 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, The Rainmaker Academy, 2004-present; senior consultant, Enterprise Network, 2001-2004.

Other Affiliations: New Horizons ... Board member, CPA Consultants' Alliance ... Past president, AFWA Music City Chapter ... AAM ... Coalition of Professional Service Providers.

Education: Middle Tennessee State University, MBA studies; 2000, BBA.

Personal: Born 1977, Nashville, Tenn. ... Married to Chad ... Two children.

Twitter: @atgrissom



**Eric Hansen****Chair, AICPA**

***Chairing both the institute and the international association at a time of significant change, Hansen brings an insider's perspective on what firms need, a strong sense of where the profession is headed and, perhaps most important, an appreciation for the rapidly increasing speed at which it's headed there.***

Career Highlights: Chief operating officer, BKD, 2010-present; managing partner, Oklahoma office, 1997; partner, 1994; joined, 1984.

Other Affiliations: Chairman, AICPA and Association of International Certified Professional Accountants; Council member; Future of Learning Task Force, 2013-2014; past chair, Audit and Financial Committee ... Missouri Society of CPAs.

Education: Evangel University, 1984, BS Acctg.

Personal: Born 1961, Independence, Missouri ... Married to Jana ... Three children.

Twitter: @erichansencpa





## Roger Harris

### President and COO, Padgett Business Services

***With tax issues at the fore this year, Harris' knowledge and insights from years as a practitioner and from working closely with the IRS make him a much-sought-after expert.***

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, IRS Advisory Council ... NAEA ... President, Padgett Foundation.

Education: University of Georgia Terry College of Business, 1973, BBA Acctg.

Personal: Born 1950, Athens, Ga. ... Two children, two grandchildren.



## Tom Hood

### CEO and executive director, MACPA

***Hood uniquely combines three vital traits: He sees the future of the profession clearly; he discovers or creates supremely practical ways to move the profession toward that future; and he generates tremendous enthusiasm for the move in everyone he meets.***

Career Highlights: CEO and executive director, Maryland Association of CPAs, 1997-present; president and CEO, Business Learning Institute ... 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: Past president, CPA State Executives Association ... Member; CPA Horizons 2025; former member, Special Committee on Mobility and Special Committee on Enhanced Business Reporting; past chair, CPA Vision Project, AICPA ... American Society of Association Executives.

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

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

Twitter: @tomhood



## Hans Hoogervorst

### Chairman, IASB

***Convergence may be slowly receding, but the direction taken by international standards remains of significant interest for the U.S. profession, and Hoogervorst is firmly in charge of that direction, with a brand-new conceptual framework to guide him.***

Career Highlights: Chairman, International Accounting Standards Board, 2011-present ... Chair, 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, 1998-2002 ... Member of Parliament, 1994-1998 ... Policy assistant on finance, People's Party for Freedom and Democracy, 1988-1994 ... International banking officer, National Bank of Washington, 1983-1986.



Other Affiliations: Past chair, IOSCO Technical Committee ... Past co-chair, Financial Crisis Advisory Group to the IASB ... 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.



**Sarah Johnson Dobek**

**President and founder, Inovautus Consulting**

*Johnson Dobek has expanded her consulting expertise well beyond growth and marketing, bringing valuable advice on a wide range of subjects to her many clients, and simultaneously to the members of the firm organization she heads.*

Career Highlights: President and founder, Inovautus Consulting, 2011-present ... President, CPAsNet, 2016-present ... Director of marketing consulting, PDI Global Inc. ... Marketing and HR director, Chicago accounting firm.

Other Affiliations: Past board member, AAM ... Past president, CPA Consultants' Alliance.

Education: Purdue University, Business, Marketing and International Business.

Personal: Born in Dallas ... Married ... One son, one dog, one cat.

Twitter: @inovautus



## Randy Johnston

**Executive vice president and partner, K2 Enterprises; CEO, NMGI**

*From the minutiae of individual software and the critical details of data security, to the biggest, broadest picture of the impact of blockchain and AI on accounting, Johnston's understanding of accounting technology is as comprehensive as his sharing of it is generous.*

Career Highlights: EVP 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 chair, AICPA Technology Conference ... Author, "Basic Using Micros;" "Business Computing Systems;" "Computers: An Introduction;" "Technology Best Practices;" "Accounting Software Solutions;" "Paperless Office;" "Accounting Firm Operations and Technology Survey."

Education: 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, seven grandchildren.

Twitter: @rpjohnston





## David Kautter

### Acting IRS commissioner

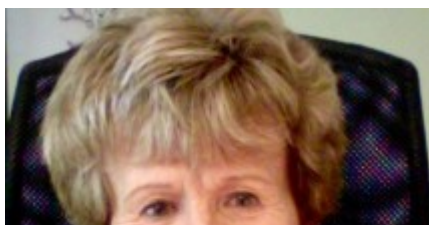
*While he should soon be stepping aside for Trump nominee Charles Rettig, Kautter will remain an undersecretary for tax policy, and his work so far getting the IRS up to speed on the changes wrought by the Tax Cuts and Jobs Act — from creating new forms to issuing needed guidance — guarantees his influence going forward.*

Career Highlights: Acting commissioner, IRS, 2017-present; assistant secretary for tax policy, Treasury Department, 2017-present ... Partner-in-charge, Washington National Tax Practice, RSM US, 2015-2017 ... Managing director, Kogod Tax Center, American University, 2011-2015; executive-in-residence, Kogod School of Business ... Director of national tax, Ernst & Young, 2000-2010; national director of human resource services, 1994-1999 ... Director of national tax, Arthur Young, 1986-1989; tax manager, 1974-1979 ... Tax legislative counsel, Sen. John Danforth, 1979-1982.

Other Affiliations: American Accounting Foundation ... American Bar Association ... AICPA.

Education: Georgetown University Law School, JD ... University of Notre Dame, BBA.

Personal: Born 1948, Plymouth, Pa. ... Married to Kathy ... Two adult children.



**Rita Keller****President, Keller Advisors**

***A veteran of the rise of the professional firm administrator, Keller is a respected voice on practice management and administration issues, and she keeps the important conversations going with a strong social media presence.***

Career Highlights: President and founder, Keller Advisors, 2008-present ... Shareholder/COO, 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 ... Past board member and president, CPA Firm Management Association; co-founder, Ohio Chapter; past president, Indiana chapter ... Blogger, "Solutions for CPA Firm Leaders."

Education: St. Mary of the Woods College.

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

Twitter: @cpamanagement



**Roman Kepczyk****Director of consulting, Xcentric**

*As a speaker, a writer, a consultant and a leader, Kepczyk is one of the elite cadre of technology-savvy sherpas who are guiding the profession as it grapples with disruptive changes in its tools, workflows and services.*

Career Highlights: Director of consulting, Xcentric LLC (a division of Right Networks), 2011-present ... President, InfoTech Partners North America, 1999-2011 ... Consultant, Varney Mills/Boomer Consulting, 1996-1999 ... Partner and director of IT/administration, Henry & Horne CPAs, 1986-1996.

Other Affiliations: Advisory Board, CPAFMA, 1994-present ... Past chair, IT Executive Committee, Top Technologies, AICPA ... Past board member, Arizona Society of CPAs ... Columnist, "CPA Practice Advisor."

Education: Arizona State University, 1994, BS Acctg.

Personal: Born 1961, Berlin, Germany ... Married ... Two children.

Twitter: @romancitp

**Ed Kless****Senior director, Sage**

***There's a lot of talk about "thought leadership" these days, but there aren't many people who actually lead the profession through their thinking alone. Kless is one of them, because his thinking is constructive, innovative, principled — and interesting.***

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 ... Host, Sage Advice Podcast ... Chair, Collin County Libertarian Party ... Candidate, Texas State Senate, 2010-2012.

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**

***Koltin is reshaping the profession two firms at a time, orchestrating a veritable host of mergers — but even when he's not facilitating M&A, he's busy educating accountants on what it takes to build a great firm.***

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

Other Affiliations: Founding member, The Advisory Board ... AAM ... Publisher/author, "Successful Merger & Acquisition Strategies;" "CPAs That Sell" and "How to Market a Consulting Niche" ... Past board member, Outsource Partners International; NACVA; H&R Block Business Services Group; AAM.

Education: University of Wisconsin, Madison and Milwaukee, 1980 BS Acctg. and Marketing.

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



### **Mark Koziel**

**Executive vice president — public accounting, Association of International Certified Professional Accountants**

*Koziel has been called "the E.F. Hutton" of the accounting profession, and we couldn't put it better: When he speaks (which is often, on topics that are of daily importance to accountants everywhere), people listen.*

Career Highlights: Executive vice president of public accounting, Association of International Certified Professional Accountants, 2016-present; vice president of firm services & global

alliances, AICPA, 2011-2016; director, specialized communities/firm practice management, 2009-2011; senior technical manager, firm practice management/PCPS, 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 ... Board, AAM, 2016-2017... Past president, Buffalo Chapter, NYSSCPA; founding member, Buffalo Chapter Young CPAs Committee.

Education: Canisius College, 1991, BS Acctg.

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

Twitter: @markkoziel



### **Art Kuesel**

**President and owner, Kuesel Consulting**

*Kuesel built his influence as a consultant one firm at a time — working with a growing roster of very happy clients to bring them up to speed on 21st century marketing, business development, practice management and more.*

Career Highlights: President/owner, Kuesel Consulting, 2013-present ... Director of marketing consulting services, PDI Global/Koltin Consulting Group, 2007-2013 ... Director of marketing



and business development, Brown Smith Wallace LLC, 2002-2007 ... Regional/niche marketing coordinator, Wipfli LLP, 1999-2002.

Other Affiliations: Past national secretary, AAM; past president, AAM Chicago; past board member, AAM Wisconsin ... Volunteer education, WICPA ... Junior Achievement.

Education: University of Wisconsin, 1997, BBA, Marketing, Business Communication.

Personal: Born 1974, Milwaukee ... Married to Colleen ... One son.



## Rene Lacerte

Founder and CEO, Bill.com

***The serial entrepreneur may be having his greatest success of all with Bill.com, as his product gradually takes over more and more aspects of the critical functions of billing, invoicing and payments, so that everyone from other software vendors and service providers to accountants is eager to partner with him.***

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 ... VP 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.

Twitter: @rlacerte



### **Gregory LaFollette**

**Strategic advisor, CPA.com**

***Despite constant threats to retire, LaFollette remains a leading voice in the transformation being wrought on the profession by and through technology, helping practitioners and vendors alike understand what accounting will look like when the dust settles.***

Career Highlights: Strategic advisor, CPA.com, 2014-present; VP of product strategy, CPA.com, 2011-2014 ... Executive editor, "The 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, chair, CITP Credential Committee; past member, Tech+ Steering Committee ... SDCPA Society ... Chair, City of Sioux Falls Ethics Committee.

Education: Augustana University, 1975, Professional Acctg.

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

Twitter: @glafollette



### **Taylor Macdonald**

**Senior vice president of channel sales, Sage Intacct**

***Sage's acquisition of Intacct hasn't diminished Macdonald's influence as a partner for accountants interested in the cloud — if anything, it's given him a larger platform.***

Career Highlights: Senior vice president of channels, Sage Intacct, 2016-present; vice president of channels, Intacct, 2010-2016 ... 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; EVP of channel and sales operations, 2004-2006; senior VP of business partners and VP 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 ... VP of finance, Resort Storage Management, 1985-1987 ... Manager, Policy Management Systems, 1981-1985.

Other Affiliations: Board, ITA ... Past board member, Southeastern Software Association.

Education: Yale University, 1977, BS.

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

Twitter: @taylormacd

**Stephen Mankowski****President, NCCPAP**

***Mankowski may be approaching the end of his stint bringing invaluable information, leadership and resources to his organization, but he will remain a font of knowledge, particularly with tax issues so critical as the provisions of the Tax Cuts and Jobs Act roll out.***

Career Highlights: Owner, Stephen F. Mankowski CPA, 2017-present ... Owner, Mankowski Associates CPA, LLC ... Partner, EP Caine & Associates, 2014-2017 ... Owner, Quantum Management Services, 1993-2014 ... Controller, Modern Dental Concepts, 1991-1993 ... Internal auditor, Campbell Soup Co., 1989-1991 ... Auditor, Coopers & Lybrand, 1987-1989.

Other Affiliations: President, National Conference of CPA Practitioners ... AICPA ... PICPA.

Education: LaSalle University, 1987, BS.

Personal: Born 1965, Philadelphia.

Twitter: @stevemankowski





## Samantha Mansfield

**Director of professional development and community, CPA.com**

***The team at CPA.com is well-known for its leadership on issues involving technology and the future of accounting, but even among them Mansfield stands out for her constant, wide-ranging efforts to get the word out that the former is absolutely critical to the latter.***

Career Highlights: Director of professional development and community, CPA.com, 2017-present; director of corporate communications, 2015-2017; senior manager of program development, 2014-2015 ... Senior technical consultant, Thomson Reuters, 2011-2013; to account representative, Creative Solutions, 2000-2004.

Other Affiliations: Salvation Army ... President, Living History Organization ... Past board member, HOA.

Education: Hillsdale College, 2000, BA Business Administration/Marketing.

Personal: Born 1977, Topeka, Kansas.

Twitter: @snmansfield



**Jason Marx****CEO, Wolters Kluwer Tax & Accounting North America**

*In tune with the “always on” workplace, Marx is taking pains to make sure the tools his unit of WK produces fit the needs of his professional users — while also making sure they keep up with the latest developments in technology.*

Career Highlights: CEO, Wolters Kluwer Tax & Accounting North America, 2015-present; president, CCH Small Firm Services, 2013-2015; VP and general manager, residential and indirect lending, Wolters Kluwer Financial Services, 2007-2013 ... EVP, FMF Capital, 2004-2007 ... VP of operations, Kaufman Financial Group, 2000-2003 ... Co-founder and managing director, AMRESO Residential Credit Corp., 1995-1999 ... VP, director of portfolio acquisitions, Household Finance Corp., 1988-1995.

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

**Chuck McCabe****Founder, president and CEO, The Income Tax School**

*At a time when more tax practitioners are examining the underpinnings — and the future — of their practices, McCabe’s sage advice on building a strong tax business is more valuable than ever.*

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

Other Affiliations: Author, "Guide to Starting and Growing Your Successful Tax Business" ... IRS Electronic Tax Advisory Committee ... Founding chair, Virginia Council of CEOs ... Board chair, Better Business Bureau of Central Virginia ... Director, Greater Richmond Chamber ... University of Richmond Dean's Advisory Board ... State Council of Higher Education of Virginia College Advisory Board Executive Committee.

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

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



## Sen. Mitch McConnell

R-Ky.

***McConnell played a critical role in shepherding the Tax Cuts and Jobs Act through, so his influence on the profession is ensured, no matter what happens during the midterm elections.***

Career Highlights: Majority leader, U.S. Senate, 2015-present; majority whip, 2003-2007; chair, Senate Rules Committee, 2001; elected, 1984 ... Judge-executive, Jefferson County, 1977-1984 ... U.S. assistant attorney general, Office of Legislative Affairs, 1975 ... Chief legislative assistant, Sen. Marlow Cook.

Education: University of Kentucky, 1967, JD ... University of Louisville, 1964, BA.

Personal: Born 1942, Sheffield, Ala. ... Married to Elaine Chao ... Three daughters.





## Scott McFarlane

**Co-founder and CEO, Avalara**

***In just one short week earlier this year, McFarlane handled two once-in-a-lifetime changes, either one of which would rivet industry watchers: launching his sector-leading tax compliance company's initial public offering, and responding to the game-changing Supreme Court decision in Wayfair.***

Career Highlights: Co-founder and CEO, Avalara, 2004-present ... Senior VP of business development and strategy, Check Point Software, 1998-2004 ... President and COO, MetaInfo (acquired by Check Point), 1996-1998 ... COO, CSS, 1993-1996 ... VP of development, AIRCOA, 1982-1992 ... Co-founder and president, NAS Fitness, 1977-1982.

Other Affiliations: NW Forum ... Information Technology Alliance.

Education: Claremont McKenna College, 1979, Economics.

Personal: Born 1957, Cleveland ... Married to Janet ... Two children.







## **Jim McGeever**

**Executive vice president, Oracle NetSuite Global Business Unit**

*Even as he works to maintain NetSuite's position as a leading cloud-based accounting platform, McGeever is also moving into the future, exploring tools like artificial intelligence and machine learning to stay on the cutting edge.*

Career Highlights: Executive vice president, Oracle NetSuite Global Business Unit, 2016-present; president, NetSuite, 2015-2016; COO, 2010-2015; CFO, 2000-2010 ... Controller, Clontech, 1998-2000 ... Controller, Photon Dynamics, 1994-1998 ... To auditor, Ernst & Young, 1988-1994.

Other Affiliations: Board member, Twilio.

Education: London School of Economics, BS.



## **Mike McGuire**

**CEO, Grant Thornton**

*Under McGuire, Grant Thornton has pushed forward with a number of brand-building initiatives, even as it also places innovation and emerging technologies at center stage.*

Career Highlights: CEO, Grant Thornton LLP, 2015-present; Board of Governors, Grant Thornton International; national managing partner of operations, Grant Thornton, 2013-2014; national managing partner of markets, industry, people and culture, 2010-2013; Carolinas managing partner, 2002-2010 ... Head of Carolinas Audit Division, Arthur Andersen, 1999-2002; audit staff, 1982-1984.

Other Affiliations: Center for Audit Quality ... Business Roundtable ... Economic Club of Chicago ... Bechtler Museum of Modern Art ... Queens University of Charlotte ... Johnson & Wales University Epicurean Society ... American Heart Association ... Komen Pink Tie Guys.

Education: Bowling Green State University, 1982, Bachelor's degree in Acctg. and MIS.

Personal: Born 1958, West Unity, Ohio ... Married to Melissa.

Twitter: @mikemcguirect



**Barry Melancon**

**President and CEO, AICPA**

***Leading both versions of the AICPA — the institute and the association, with more than half a million members worldwide — Melancon is indisputably the most influential person in accounting. But it's not numbers that make the difference: It's his vision for where the profession is headed, including major plans for the audit, and his ability to bring accountants along with him.***

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) ...Chairman, International Integrated Reporting Council ... U.S. Delegation, IFAC ... Chairman, XBRL-US ... U.S. Chamber of Commerce's Center for Capital Markets Competitiveness ... Board, Global Accounting Alliance.

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

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

Twitter: @barrymelancon



## **Edward Mendlowitz**

### **Partner, WithumSmith+Brown**

*There are many veterans who've been in the profession for decades, but few of them have Mendlowitz's facility for mining those years for a seemingly endless array of useful lessons — and even fewer can match his devotion to sharing that hard-won wisdom with his peers.*

Career Highlights: Partner, WithumSmith+ Brown, 2005-present ... Partner, Mendlowitz Weitsen LLP, 1988-2005 (merged into Withum in 2005) ... Shareholder, Siegel, Mendlowitz & Rich, 1974-1988 ... Shareholder and employee, Jack Grushan & Co., 1970-1973 ... Self-employed 1969-1970 ... Staff accountant, various firms, 1963-1969.

Other Affiliations: AICPA ... NYSSCPA... NJCPA ... Trustee, Accounting Club of America...  
President, Congregation Beth Ohr Men's Club ... Author, 27 professional books.

Education: Baruch School, City College of New York, 1963, BBA.

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

Twitter: @emendlowitz



## Steven Mnuchin

### Treasury Secretary

***Mnuchin's Treasury is working overtime to release the guidance businesses and their advisors need to implement the Tax Cuts and Jobs Act, while at the same time striving to carry out an administration mandate to cut red tape and government regulations.***

Career Highlights: U.S. Secretary of the Treasury, 2017-present ... Chairman and CEO, OneWest Bank, 2009-2015 ... Founder and CEO, Dune Capital Management... Co-founder, SFM Capital Management ... Vice chairman, ESL Investments ... To CIO, Goldman Sachs, 1985-2002; partner, 1994.

Other Affiliations: Founder, RatPac-Dune Entertainment ... Past board member, Junior Achievement; Hirshhorn Museum and Sculpture Garden.

Education: Yale University, 1985, Bachelor's.

Personal: Born 1962, New York City ... Married to Louise Linton ... Three children.



**Stan Mork**

**President, ITA**

***With technology looming large in so many accountants' doomsday scenarios, it's easy to forget the profession boasts some very fine, very cutting-edge technologists itself — and Mork and the ITA represent some of the finest, boldly taking firms, vendors, consultants and others into a future others are still afraid of.***

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, 1994-1996 and 2004-2006 ... System analyst, Farm Credit Services, 1982-1984 ... Sales representative, Digital Equipment, 1980-1982 ... Territory representative, Burroughs Corp., 1978-1980.

Other Affiliations: Volunteer chair, 2003 Leadership St. Paul Planning Committee.

Education: Concordia College, BA BA.

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

Twitter: @stanmork





### Jay Nisberg

**President, Jay Nisberg & Associates**

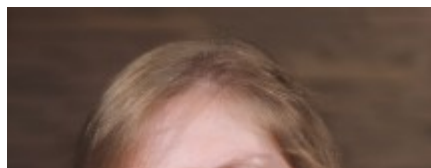
***A perennial influencer, Nisberg is a long-time consigliere and advisor to many of the most prominent firms in the profession, moving them forward one conversation, one firm retreat, and one consultation at a time.***

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.





## Nina Olson

### National Taxpayer Advocate, IRS

*The NTA adroitly performs two crucial functions: the more high-profile one of keeping an eye on the IRS to make sure it's serving the American taxpayer well, and the less well-known one of keeping an eye out for the IRS, to make sure it has the resources it needs to handle vast new mandates like the changes brought about by tax reform.*

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 ... 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 ... Faculty, Harvard Kennedy School of Government Comparative Tax Policy and Administration Program.

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.





## Jody Padar

**CEO and principal, New Vision CPA Group**

*With her second book coming out, Padar's crusade to make all firms "Radical CPAs" — cloud-based, forward-thinking practices that embrace value-billing and advisory services — is only gaining steam.*

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," "From Success to Significance"... AICPA Practitioners and Tech+ Steering Committee ... Maryland Association of CPAs ... Adjunct professor, Accounting Advisory Board, Oakton Community College.

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

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

Twitter: @jodypadarcpa



## Hitendra Patil

**Director of practice development, AccountantsWorld**

*Patil takes a fresh approach to identifying — and proposing solutions for — some of the biggest challenges accountants face, sharing them in frequent blogs, social media posts, and other outlets.*



Career Highlights: Director of practice development, AccountantsWorld, 2016-present ... COO, Pransform Services Inc., 2011-2016 ... COO, Saraff Infotech Co., 2005-2011 ... Assistant vice president of global financial services, Viteos Technologies Ltd., 2004 ... VP of business development and operations, Central Depository Services (India) Ltd., 1998-2003 ... General manager of systems, Sharepro Services, 1997 ... Senior officer of transformation, Reliance Consultancy Services Ltd., 1991-1996.

Other Affiliations: Author, "Accountaneur: The Entrepreneurial Accountant" ... Past chair, Information & Communications Technology Committee, India-Thai Chamber of Commerce.

Education: University of Mumbai, 1992, MS ... Sathaye College, 1989, BS ... IBM Blockchain Essential Certification, 2017.

Personal: Born 1967, Mumbai ... Married to Soni.

Twitter: @hitendrarpatil



### **Carl Peterson**

**Vice president of small firm interests, AICPA**

*Peterson is the ombudsman of the country's countless small practitioners, staying deeply in touch with their concerns and their challenges so that he can represent them at the highest levels, and offer them guidance and advice in return.*

Career Highlights: Vice president of small firm interests, American Institute of CPAs, 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 Ramme Co., 1985-1989 ... Staff accountant, Berc & Fox Ltd., 1980-1985.

Other Affiliations: Chair, Minnesota State Board of Architecture, Engineering, Land Surveying, Landscape Architecture, GeoScience and Certified Interior Design ... Chair, Legislative Affairs Committee, MNCPA; trustee, MNCPA PAC ... Technical advisor, IFAC.

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

Personal: Born 1958, Peoria, Ill. ... Married to Joan (also a CPA) ... Three children (one of whom is a CPA).



### **Scott Peterson**

**Vice president of U.S. tax policy and government relations, Avalara**

*It's not Peterson's background in South Dakota that gives him such unique insight into the implications of the landmark Wayfair sales tax case (though it certainly doesn't hurt) — it's his long experience in the field, including serving as head of the Streamlined Sales Tax Governing Board.*

Career Highlights: Vice president of U.S. tax policy and government relations, Avalara, 2013-present ... Executive director, Streamlined Sales Tax Governing Board, 2006-2013 ... Sales tax

director, South Dakota Department of Revenue, 1995-2006 ... Principal research analyst, South Dakota Legislative Research Council, 1995-2002.

Education: University of South Dakota, 1982, MPA ... Black Hills State University, 1980, BS.

Personal: Born 1955, Mobridge, S.D. ... Married to Loren ... One child.

Twitter: @\_scottcpeterson



### **Terri Polley**

#### **President and CEO, FAF**

***Busy on a day-to-day basis facilitating the work of the two main accounting standards boards in the U.S., Polley will be extra-busy (and even more influential) as the FAF begins to look for successors to the current chairs of FASB and GASB, whose terms end in 2020.***

Career Highlights: President and CEO, 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 ... Immediate past chairman, Greater Norwalk Chamber of Commerce ... Board of Trustees, St. Francis University.

Education: St. Francis University, 1982, BA Acctg. and French.

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



### **Terry Putney**

**CEO, Transition Advisors**

*Whether it's the details of the latest tweaks to firm valuations and partner payouts, or the cultural sticking points that can make or break a merger, Putney's vast stock of knowledge makes him one of the pre-eminent advisors in accounting M&A.*

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, 1986-1998.

Other Affiliations: Co-author, "CPA Firm Mergers & Acquisitions" ... Past president, CPA Consultants Alliance ... Consultants Trust ... AICPA ... University of Kansas Accounting/Information Systems Advisory Council.

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

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

**Ron Quaranta****Chairman, Wall Street Blockchain Alliance**

*Through his group's partnership with the AICPA and CPA.com, Quaranta has become "the human face" of blockchain, helping accountants wrap their heads around a technology that has been billed as having the power to destroy accounting as we know it.*

Career Highlights: Chairman, Wall Street Blockchain Alliance ... Managing partner, DIG.Capital, 2017-present ... COO, Loyyal, 2016 ... CEO, Digital Currency Labs, 2014-present ... Global head of trading analytics, head of exchange trading for the Americas, Thomson Reuters, 2004-2013 ... President and founder, Net2b.com Inc., 1999-2000 ... Head of business analysis and product management, Davidsohn Global Technologies, 1997-2004.

Other Affiliations: YMCA of Freehold ... Advisory board, BanQu Inc.; BlockEx Global Capital Markets; Brave New Coin Inc.; Coin.co; CueFin Solutions; Marco Polo New World Inc.; Moneero.

Education: Villanova University, 2005, Masters Certificate in Information Systems and Technology Project Management ... St. John's University, 1995, MBA International Finance; 1989, BS Finance.

Personal: Born 1967, Brooklyn.

Twitter: @ronqman



**Darren Root****CEO, Rootworks and Liscio**

*As a practitioner himself, Root knows exactly the kind of advice and the tools that practitioners need, and he delivers both in his dual roles as head of a network of firms, and as chief of a software developer that's building a new way for accountants and their clients to interact.*

Career Highlights: CEO, Rootworks, 2006-present ... CEO, Liscio, 2016-present ... Executive editor, "CPA Practice Advisor," 2008-2014 ... President, RootAdvisors, 1985-present.

Other Affiliations: Past member, CITP Credential Committee, AICPA ... Past board member, INCPAS ... Author, "The Intentional Accountant" ... Co-Author, "The E-Myth Accountant;" "YOUtility for Accountants" ... Founder, Thomson Reuters Partner Summits.

Education: Indiana University, 1984, BS Acctg.

Personal: Married to Michelle ... Three grown children.



**Marc Rosenberg****President, The Rosenberg Associates**

*This die-hard Cubs fan is a prime source of practice management advice from way back, sharing his wisdom through his ever-expanding monograph series and in roundtable groups — and by reaching out to younger generations by mentoring accounting students.*

Career Highlights: President, The Rosenberg Associates, 1994-present ... COO, Friedman, Eisenstein, Raemer & Schwartz ... Senior auditor, Ernst & Young.

Other Affiliations: Author, The Rosenberg Practice Management Book Series (15 titles) ... Founder, Rosenberg MAP Survey ... Founder, Rosenberg Chicago Roundtable Groups ... The Rosenberg Blog ... Founding member, The New Horizon Consulting Group ... AICPA ... ICPAS.

Education: University of Illinois-Chicago, BS Acctg.

Personal: Born in Chicago ... Married to Ellen ... Two children, one grandchild.

**Paul Ryan****R.-Wis.**

*He may be planning on retiring from Congress at the end of the year, but Ryan has already left his mark, having been one of the lead players in the once-in-a-generation tax reform completed last December, which will keep the profession very busy for the foreseeable future.*

Career Highlights: Speaker, U.S. House of Representatives, 2015-present; chair, Ways & Means Committee, 2015; chair, Budget Committee, 2011-2015; elected, 1998 ... Marketing consultant, Ryan Inc. Central, 1997-1998 ... Legislative director, Sen. Sam Brownback, 1996-1997 ... Speechwriter, Jack Kemp, 1996 ... Speechwriter, Empower America ... Legislative aide, Sen. Bob Kasten, 1992.

Education: Miami University, Bachelor's.

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

## Tim Ryan



### Timothy Ryan

**Chairman and senior partner, PwC US**

*Ryan is looking after his staff with initiatives like a \$45 million investment in wellness bonuses and a new workforce engagement app, while also broadening his Big Four firm's horizons with moves like opening an independent law firm in the U.S.*

Career Highlights: Chairman and senior partner, PwC US, 2016-present; past member, Global Board; vice chairman and leader of U.S. markets, strategy and stakeholders, 2013-2016; vice chairman of assurance, 2009-2013; leader, U.S. financial services industry practice, 2005-2009.

Other Affiliations: AICPA ... Governing Board, CAQ ... Trustee, SEC Historical Society ... Board, Children's Aid Society.

Education: Babson College, 1988, Acctg./Communications.



Personal: Born in Dedham, Mass. ... Six children.



### **Russell Shapiro**

**Partner, Levenfeld Pearlstein**

*As long as there are mergers happening in the field (and that's likely to be for a long time), people will be looking to this CPA and lawyer for his insights into deal structure, and to make sure they've dotted all their i's and crossed all their t's.*

Career Highlights: Partner, Executive Committee member, Levenfeld Pearlstein LLC; past head, corporate and securities practice ... Attorney, Sonnenschein Nath & Rosenthal, 1989-1993.

Other Affiliations: Spertus Institute ... Corporate Law Section, American Bar Association.

Education: University of Pennsylvania Law School, 1989, JD ... University of Illinois, Urbana-Champaign, 1986, BA Acctg.

Personal: Born 1964, Chicago ... Married to Lori ... Three children.





## Todd Shapiro

### President and CEO, ICPAS

*Shapiro is leading his society to explore important — and sometimes difficult — issues in the profession, from the potential technological divergence between small and large firms, to the reasons not enough accountants take the CPA Exam, to the ways traditional accounting culture may conflict with firm goals.*

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.

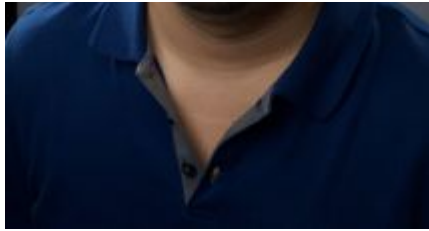
Other Affiliations: President and CEO, CPAs for the Public Interest ... CPA/Society Executives Association ... FEI ... American Society of Association Executives ... Ex officio board member, CPA Endowment Fund of Illinois ... Accountancy Advisory Board, University of Illinois at Urbana-Champaign ...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

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





## Donny Shimamoto

**Managing director, IntrapriseTechKnowlogies**

*They may be trusted advisors, but CPAs could use a little advice themselves, and when it comes to technology, Shimamoto is one of the profession's most trusted advisors, working individually with firms, as well as sharing his wisdom at conferences and in frequent public appearances.*

Career Highlights: Managing director, IntrapriseTechKnowlogies, 2001-present ... Principal consultant, Data House, 2001 ... Senior consultant, PwC LLP, 1997-2001.

Other Affiliations: Past chair, Information Management & Technology Assurance Executive Committee, AICPA ... Past board member, Hawaii Society of CPAs ... Past board member, AITP Honolulu Chapter ... ISACA ... IIA.

Education: University of Hawaii at Manoa, 1997, BBA Acctg. & MIS.

Personal: Born 1975, Honolulu, Hawaii.

Twitter: @donnyitk



**Joel Sinkin****President, Transition Advisors**

*Sinkin has consulted on more than 750 mergers and acquisitions over the past three decades, and he's going to put that tremendous experience to use on all the mergers to come — as well as offering it to accountants at large in his frequent presentations and articles.*

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, one daughter.

**Brad Smith****Chairman and CEO, Intuit**

*Smith may be stepping down at the end of the year, but during his tenure he has more than doubled Intuit's customers and revenues, and the decisions he makes today will impact hundreds of thousands of accountants for years to come.*

Career Highlights: Chairman and CEO, Intuit Inc., 2016-present; president and CEO, 2008-2015; senior VP and general manager, Small Business Division, 2006-2007; general manager, QuickBooks Group, 2005-2006; leader, Consumer Tax Group, 2004-2005; VP and general manager, Accountant Central and Developer Network; joined, 2003 ... Senior VP 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



## Rick Telberg

Founder and CEO, CPA Trendlines

*Telberg reaches literally hundreds of thousands of accountants with his newsletters, connecting them with both new and established thought leaders through his publishing efforts, and gleaning valuable insights about the profession from their responses to his surveys.*

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: AAM ... 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, 1978, Bachelor's.

Personal: Born 1956, New York City.

Twitter: @cpa\_trendlines



### Ralph Albert Thomas

**CEO and executive director, NJCPA**

***Thomas' 15,000-plus members rely on him for resources that meet their ever-changing needs and to represent their interests at all levels, even as the profession nationwide relies on him for leadership in areas like diversity and inclusion, and valuable input on the direction of accounting.***

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: New Jersey Economic and Fiscal Policy Working Group ... AICPA Foundation Board; inaugural National Commission on Diversity and Inclusion; past member, AICPA Council, AICPA Group of 100; CPA Vision Project ... Past board member, CPA/Society Executives Association ... State Society Network Inc. ... Shared Services LLC ... Past national president, NABA ... Accounting advisory boards, Lehigh; Rutgers; Seton Hall; Montclair State University; Felician University; Thomas Edison State University; Middlesex County College ... Member and past chair, NASBA State Society Relations Committee; member, Diversity and Inclusion Committee.

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**

***As his institute gets ready for to celebrate its first hundred years in 2019, Thomson is working to get it ready for its next hundred, including creating a competency framework for management accountants that will prepare them for the future.***

Career Highlights: President and CEO, Institute of Management Accountants, 2008-present; VP 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, IIRC ... Past board member, Committee of Sponsoring Organizations of the Treadway Commission ... Association of Society Executives.

Education: Montclair State University, MS Mathematics and Statistics; BS Mathematics.

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

Twitter: @ima\_jeffthomson



## Donald Trump

### President of the United States

***Love him or hate him, his signature on the Tax Cuts and Jobs Act has kept accountants busy all year and will keep them occupied for the foreseeable future, even as his administration looks to reduce regulation elsewhere.***

Career Highlights: U.S. president, 2017-present ... President, The Trump Organization, 1971-2017 ... Executive producer, "The Apprentice," 2003-2015.

Other Affiliations: The Donald J. Trump Foundation.

Education: The Wharton School, University of Pennsylvania, 1968, BS Econ.

Personal: Born 1946, Queens, N.Y. ... Married to Melania ... Three sons, two daughters; eight grandchildren.



Twitter: @realdonaldtrump



### **Therese Tucker**

**CEO and founder, BlackLine**

***Closing the books is a recurring nightmare for businesses and their accountants, but Tucker's efforts to streamline the process through software are paying off, leading more and more firms to partner with her company to benefit their clients.***

Career Highlights: CEO and founder, BlackLine, 2001-present ... Chief technology officer, SunGard Treasury Systems, 1997-2001 ... CTO, ADS Associates, late 1980s-1997.

Other Affiliations: Board member, California Community Foundation.

Education: University of Illinois, BS Mathematics and Computer Science.

Personal: Born 1961, Illinois ... Married to Brian ... Two children.



**David Vaudt****Chairman, GASB**

*His term may end in 2020, but Vaudt is not slowing down, focusing on stakeholder outreach and implementation support to help transition to major new standards on non-pension retirement benefits, even as his board continues to release a stream of proposals, guidance and updates.*

Career Highlights: Chairman, GASB, 2013-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.

**Jennifer Warawa****Executive vice president of partners, accountants and alliances, Sage**

*You might expect Warawa to spread the word of her company's products while working with its many partners, and she does — but she also takes every opportunity to teach accountants more broadly about the profession's technology-enabled future, and what they need to do to thrive there.*

Career Highlights: EVP of partners, accountants and alliances, Sage, 2017-present; global VP of product marketing, Sage, 2015-2017; VP and general manager, Sage Accountant Solutions, Sage North America, 2013-2015; VP of partner programs & channel sales; joined, 2008 ... Owner and operations manager, Dreamscape Business Services Ltd., 1995-2008.

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

Education: Okanagan University College, 1997.

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

Twitter: @jenniferwarawa



## Geni Whitehouse

### Founder, Even a Nerd Can Be Heard

*Whitehouse spends her days "banishing boring," and she's certainly anything but, lending excitement and interest to every field she touches, whether it's accounting for wineries, communicating complicated subjects, or, most recently, helping accountants move away from compliance work to higher-value-added services.*

Career Highlights: Countess of Communication, Brotemarkle, Davis & Co. LLP, 2007-present ... Founder, Even a Nerd Can Be Heard, 2007-present ... Level 5 evangelist, Mentor Plus, 2018-present ... Vice president, Sage Software, 2004-2007 ... Vice president, Accpac, 2002-2004 ... COO, Accounting Software Advisor, 2002 ... COO, Elliott Davis Technology Solutions, 2001-

2002 ... Director of product marketing and strategic alliances, Navision US, 1999-2002; manager, CPA Alliances, 1998-1999 ... Software trainer and implementer, Evans Technology, 1995-1998 ... Partner, Gross Duke & Nelson, 1991-1995 ... Contract controller, Touch Industries and PHP Inc., 1989-1990 ... Corporate tax director, Dental Research Corp., 1988-1989 ... Corporate tax manager, Super Valu, 1986-1988 ... To senior accountant, Deloitte, Haskins and Sells, 1982-1986.

Other Affiliations: Instructor, WISE Academy, 2009-present ... Author, "How to Make a Boring Subject Interesting" ... Mentor Plus Consulting Accountants Roundtable ... XBRL steering committees ... Girl Scouts.

Education: University of North Carolina, Chapel Hill, 1981, BSBA Concentration in Accounting.

Personal: Born 1959, Atlanta ... Married to Charles ... Two children, one grandchild.

Twitter: @evenanerd



### **Sandra Wiley**

**President and shareholder, Boomer Consulting**

*A frequent speaker on recruiting, retention and other personnel issues, Wiley is one of the profession's most useful allies in its struggle to deal with the staffing crisis, even as she helps train and raise up its next generation of leaders.*

Career Highlights: President and shareholder, 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" and "The Journey Ahead: A New Roadmap to Collaboration in Your Firm" ... Chairman, CPA Consultants Alliance ... Co-creator, Business Transformation Playbook ... Creator, The P3 Leadership Academy ... Creator, The CEO Advantage Program ... 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.

Education: Friends University, 1990, BS HR.

Personal: Born 1960, Stafford, Kansas ... Married to Doug ... Three children, four grandchildren.

Twitter: @sandrawiley



**Jennifer Wilson**

**Co-founder and owner, ConvergenceCoaching**

*Wilson is outspoken in her drive to make firms better, particularly when it comes to how they*

***manage their staff and their practices. But as one admirer notes, her clients and those who hear her at her many speaking engagements always thank her for her "tough love."***

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 ... VP 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...The Consultants' Trust ... Past chair, Education Committee, AAM ... CPA Firm Management Association ... CPA Leadership Panel ... Digital CPA Planning Committee; past chair, Tech Committee, AICPA; Workload Compression Task Force ... American Marketing Association ... Society for Human Resource Management ... Founding member and board member, ITA.

Education: University of Nebraska, Omaha, 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.

Twitter: @jenleewilson



**Joe Woodard**

**CEO, Woodard Events**

***Even while weathering a tough year, Woodard's Scaling New Heights event remains one of the top gatherings for accountants looking to understand the confluence of accounting and technology.***

Career Highlights: CEO, Woodard Events, 2003-present; host, Scaling New Heights conference, 2008-present; host, Woodard Network; host, Woodard Institute, 2016-present ... Intuit training and event production contractor, 2003-present.

Education: University of New Orleans, 1999-2000, graduate studies in Accounting ... Mercer University, 1990, BA Classical Greek.

Twitter: @joewoodard



### **Candace Wright**

#### **Chair, Private Company Council**

*Having been recently appointed to a second term, Wright continues to lead the PCC in helping FASB take the needs of private businesses into consideration while setting accounting standards.*

Career Highlights: Director and service line leader, Accounting & Assurance Services Group, Postlethwaite & Netterville, 1995-present; joined, 1985 ... Accountant, Medi-Save Pharmacies Inc., 1983-1985.

Other Affiliations: Chair, Private Company Council, 2015-present ... AICPA PCPS Technical Issues Committee; chair, PCPS Executive Committee ... Financial Institutions Committee, Louisiana Society of CPAs ... Past president, Baton Rouge Chapter of CPAs ... Healthcare Financial Management Association ... Small Business Advisory Committee, FASB.

Education: McNeese State University, Lake Charles, La., 1983, BS Acctg.

Personal: Born 1962, Baton Rouge, La.



### **Diane Yetter**

#### **President, Yetter Tax**

***Long a major source of sales tax wisdom for the profession, Yetter's star has only risen further as accountants and businesses look to her for help understanding the ramifications of Wayfair.***

Career Highlights: President, Yetter Tax, 1996-present ... Tax manager, Arthur Andersen, 1989-1996 ... Sales tax accountant, Quaker Oats Co., 1988-1989 ... Auditor II, Kansas Department of Revenue, 1985-1988.

Other Affiliations: Founder, Sales Tax Institute ... Certified Implementation Partner and trainer, Thomson Reuters Indirect Tax ... Certified Training and TDM Specialist, Vertex ... Accounting & Consulting Partner, Avalara... Institute of Professionals in Taxation ... Council on State Taxation ... Chicago Tax Club ... AICPA ... Illinois CPA Society ... Institute of Finance & Management ... Author, "Drop Shipments: Taxation, Compliance and Planning;" "Multistate Guide to Sales and Use Tax: Manufacturing;" "IBFD VAT Worldwide" ... Past chair, Dean's Advisory Board, University of Kansas School of Business; adjunct professor.



Education: DePaul University, 1994, MS Taxation ... University of Kansas, 1985, BS Acctg. and Business Administration.

Personal: Born 1963, Chicago.

Twitter: @yettertax, @salestaxinst

See this year's "[Ones to Watch](#)" list.