THE TOP 100 MOST INFLUENTIAL PEOPLE

THE THOUGHT LEADERS AND VISIONARIES WHO ARE SHAPING THE ACCOUNTING PROFESSION

Accounting’s biggest issues P. 18  What they’re most excited about P. 22  Productivity enhancers P. 25  Who they think is influential P. 27
Want to be an influential person in accounting? Here’s how

GAINING ENTRY TO OUR ANNUAL LIST OF THE TOP 100 Most Influential People in Accounting isn’t easy, but it can be done. We’ve put together a list of some of the activities that most of our T100 engage in. All you have to do is commit yourself to the following for the next year or so.

Innovate and create. One sure-fire way to influence the accounting profession is to build something useful for them—a tool that revolutionizes how audit confirmations are collected, for instance, or a clearinghouse for safely sharing financial information, or just the software they use everyday. But you can also create ideas—like standards for sustainability, or new ways to market professional services.

Educate. Whether it’s big game-changing ideas or the intricate details of the least-important section of the Tax Code, teaching the profession something it didn’t know is a sure path to influence. (Just be sure to teach a lot of people.)

Regulate. Enforcing the rules automatically comes with one form of influence, and that’s the kind we recognize most often. But in the right hands, it also creates the ability to call for the best in those being regulated.

Cross-pollinate. A small but vibrant subset of our T100 is composed of people who specialize in bringing together firms through M&A—but on a broader level, everyone on this list is constantly in contact with people throughout the profession and beyond, making introductions and connections and bonds that might not have happened without their influence.

Elevate. The profession has high ideals and a very bright future. Those who help it meet those ideals, and those who are actively planning that bright future, are among the most influential of all. All you have to do is become a nationwide thought leader, or start envisioning and building the structure of the profession for the next five, 10 or 20 years.

Finally, to guarantee your spot on the list, you should also travel far, far too much. If there’s one thing that unites almost all of the Top 100, it’s that they spend an awful lot of time in airports. Even in these days of Skype and social media, building influence is still often best done face to face (or face to faces).

With all that in mind, we invite you to meet this year’s class of the Top 100 Most Influential People—and we hope you’ll join them next year!

— The Editors
fluency — but it doesn’t hurt either, and the fundraising opportunity it created is just one very conspicuous example of the ways Barry is rethinking things at the New York society.

Others include a major new conference on sustainability accounting, a proposal to open membership to non-CPA professionals, and using IT and big data solutions to target prospective members.


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

In just four years, Berson has used both strong organic growth and a string of high-profile mergers to double his firm’s revenue — and make it the first new billion-dollar firm in almost a decade.


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


Chandra Bhansali
CEO, AccountantsWorld

Few people have been in the cloud as long as Dr. Bhansali, and even fewer have his passion for trying to convince the profession of its benefits.


Education: State University of New York, 1979, Ph.D. Indian Institute of Science, 1979, MS … MBM Engineering College, 1968, BE.

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

Blog/Twitter: http://community.accountantsworld.com / @cbhansali

Jason Blumer
Founder and CEO, Thriveal Network

Blumer’s virtual firm and his network of similarly minded progressive accountants are real-life incubators for new ideas, approaches and new visions of what it means to be a practicing accountant.


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


Blog/Twitter: www.blumerpcas.com/blog / www.thriveal.com/blog / @jasonblumer

Gary Bolinger
President and CEO, Indiana CPA Society

A former high school band director, Bolinger has truly orchestrated some far-reaching changes, pushing the profession and state legislators to embrace more innovative ways of educating CPAs, from competency-based education to nano-learning.


Other Affiliations: American Society of Association Executives … Advisory Council, Indiana State University Accounting Department … Past member, Strategic Planning Committee, AICPA; past member, Peer Review Board, State Legislative Committee … Institute for Organization Management … University of Texas at Austin, 1999, MA, 1975.

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

Blog: “I was just thinkin’ …” http://blogs.incpas.org

Gary Boomer
Founder, visionary strategist, Boomer Consulting Inc.

Boomer was formally named the “visionary” at his eponymous technology consulting group this year, but in reality he has been a visionary for many years, demonstrating the value of future technologies to the profession for decades.


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

Education: Kansas State University, BS and MS in Accctg.

Personal: Married to Mary … Three children.

Blog/Twitter: www.thinkplangrow.net / @gboomer

Jim Boomer
CEO and shareholder, Boomer Consulting Inc.

Now CEO of one of the foremost consultancies to the profession in the country, Boomer has been building a reputation as a thought leader who can help accountants create next-generation firms.


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

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

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

Blog/Twitter: www.thinkplangrow.net / @jimboomer

Jim Bourke
Partner, WithumSmith+Brown

While Bourke’s role leading technology efforts at a top accounting firm is thankfully becoming more common in the profession, his rare ability to guide others in building future-ready practices has only risen in demand — keeping him busy spreading the gospel of good tech.


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

Education: Kean University, 1987, BS Accctg.

Personal: Born 1964, Jersey City, N.J. … Married to Judy … Three children.

Twitter: @jimbourke

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

A prolific blogger, Caron’s widely read site thoroughly covers the latest developments in the field of tax, particularly with his ongoing coverage of the scandal involving IRS employees’ extra scrutiny of tax-exempt applications from conservative groups. Caron also blogs extensively about issues related to academia.
Career Highlights: Associate dean for research and professor of law, Pepperdine University School of Law, 2013-present ... Summer visiting professor, University of San Diego School of Law, 2001-2014; ... Professor, University of Cincinnati College of Law, 1990-2013 ... Associate, Tax Department, Sullivan & Worcester, 1985-1990 ... Law clerk, Chief Judge William Holloway, U.S. Court of Appeals for the Tenth Circuit, 1983-1985.

Other Affiliations: Owner and publisher, Law Pro- fessor Blogs Network ... Series editor; Graduate Tax Series; Law Stories ... Author, Tax Stories; Federal Wealth Transfer Taxation; Federal Income Tax An- thology.

Education: Boston University, 1988, LLM (Tax)... Cornell Law School, 1983, JD ... Georgetown Universi- ty, 1978, AB.

Blog/Twitter: http://taxprof.typepad.com / @socal-taxprof

Jack Ciesielski
Publisher, The Analyst’s Accounting Observer

Ciesielski has kept a close watch on corporate accounting with his publication for nearly a quarter of a century and he is frequently quoted in the mainstream press. His opinions on the misuse of non-GAAP financial measures helped drive a debate this past year that has drawn increasing scrutiny from the SEC.


Other Affiliations: Past member, Accounting Stan- dards Executive Committee, AICPA ... Past member, Emerging Issues Task Force, FASB ... MACPA ... CPA Institute.

Education: Loyola University, 1984, BA; 1976, BA.

Personal: Born 1954, Baltimore ... Married to Mau- reen ... Two sons.

Blog/Twitter: http://accountingobserver.com/blog / @jciesielski

David Cieslak
Principal, Arxis Technology

While Cieslak is often invited to events to share his ever-pertinent IT security knowledge, his alter ego, Inspector Gadget, also garners plenty of stage time as CPAs embrace the business case for cool new devices.


Other Affiliations: Past chair, Sage Business Partner Advisory Council ... Past chair, AICPA IT Executive Committee ... Past board member, Information Tech- nology Alliance ... Past president, California CPA Ed- ucation Foundation, 2000-2001 ... Member and past chair, CalCPA State Technology Committee ... Associ- ate instructor, K2 Enterprises.

Education: University of California, 1982, BA Eco- nomics.

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

Twitter: @dacieslak

Lauren Clemmer
Executive director, AAM

While relatively new to her post, Clemmer brings leadership and focus to AAM’s ongoing mission to educate accounting firms about marketing, and to spotlight the best for others to learn from.

Career Highlights: Executive director, Association for Accounting Marketing, 2015-present ... Marketing manager, Ciani & 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.

No one knows how to grow an accounting firm like Crosley, but while her knowledge of time-tested strate- gies is second to none, her real secret is an uncanny eye for the emerging opportunity, and her willingness to share it.


Other Affiliations: Advisory Board, Journal of Ac- countancy ... AICPA ... Georgia Society of CPAs ... Ohio Society of CPAs ... Author, At the Crossroads.

Education: University of Akron, 1972, BS Accg.

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

Twitter: @gcroscley

Loretta Doon
CEO, CalCPA

CalCPA continues to hit mem- bership records, but Doon isn’t letting up on her outreach to students, young professionals, women and minority groups to encourage both growth and diversity in accounting.


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

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

Phil Drake
Founder and CEO, Drake Software

This early e-file visionary and software veteran has built his company from the ground up to become the largest independent company in the tax preparation software industry.


Other Affiliations: Board of Trustees, Western Caro- lina University ... Board of Directors, National Chris- tian Foundation.


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

James Doty
Chairman, PCAOB

While he’s been known to wear cowboy boots to the office, Doty is no cowboy — he’s more of a questing knight, protecting the integrity of the public markets even as he pursues the Holy Grail of high-quality audits and auditors.


Other Affiliations: American Law Institute ... Amer- ican Bar Association ... State Bar of Texas ... Houston Bar Association.

Education: Yale Law School, 1969, LLB ... Harvard University, MA in History ... Oxford University, 1964, AB ... Rice University, 1962, BA in History.

Personal: Born in Houston ... Three grandchildren.

Twitter: @jamesdoty

Kimberly Ellison-Taylor
Incoming chair, AICPA

Among the many perspectives this Oracle exec represents, that of the CPAs in industry might be the most important, as the institute reaches out to them with offers- like the CGMA credential.

Career Highlights: Global accounting strategy di- rector for the financial and professional services in- dustries, 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: Incoming chair, AICPA ... Past chair, MACPA ... Alumni Board of Directors, Univer- sity of Maryland Baltimore County ... Community service president, Sigma Gamma Rho Sorority Inc. ... Education: Carnegie Mellon University, 2008, MSIT IT Management; 2003, CIO Certificate ... Loyola University Maryland, 1996, MBA Business Administra- tion ... University of Maryland, Baltimore County, 1993, BA Information Systems Management. 

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

Twitter: @kelltontaylor

Cathy Engelbert
CEO, Deloitte

As the first woman to lead a Big Four firm, Engelbert isn’t just an inspiration for women (and men, too!) — she’s actively encouraging the next genera- tions to join and stay with the profession, even as she leads her firm to new heights.

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Other Affiliations: Chair, Governing Board, Center for Audit Quality ... Catalyst ... American Heart Association ... CEO Roundtable ... Kennedy Center Corporate Fund Board ... Business Roundtable ... Accounting Advisory Board, Lehigh University ... AICPA ... New Jersey Society of CPAs ... Past member, FASAC.

Education: Lehigh University, 1986, BS Accctg.

Personal: Born 1964, Collingswood, N.J. ... Married ... Two children.

Twitter: @cathyengelbert

Jina Etienne
President and CEO, NABA

Etienne brings personal experience from almost every corner of the profession — at firms small and large (including her own), in volunteer roles at business and civic organizations, and in a leadership role at the AICPA — which will stand her in good stead as she pursues NABA’s mission of boosting opportunities for people of color in accounting and finance.


Other Affiliations: Past member, PCPS Executive Committee, AICPA ... MACPA ... Past president, Women Business Owners of Montgomery County ... Past member, Membership Committee, Greater Silver Spring Chamber of Commerce ... Past treasurer, Tahiri Justice Center.

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

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

Twitter: @naba_ceo; @misstaxcat

Kim Fantaci
President, CPAFMA

In her more than two decades of working on behalf of firm administrators, Fantaci has helped raise their profile and their skill set enormously — and just last year she raised her organization’s profile with a timely rebranding.


Other Affiliations: American Society of Association Executives ... AMC Institute ... AICPA PCPS ... 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, Tax and Accounting, Bloomberg BNA

Farrah oversees the acquisition, organization, analysis and dissemination of tax information to tens of thousands of tax professionals, and his insights and efforts keep Bloomberg BNA at the forefront of the tax information business.


Other Affiliations: AICPA.

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

Personal: Born in Norwich, Conn.


Lewis Ferguson
Board member, PCAOB

Ferguson has helped the PCAOB stay in contact with its counterparts abroad through his involvement with the IFIAR, whose members have been able to share information about the problems they are seeing around the world. His reappointment at the PCAOB last year means he will stay involved in overseeing important new standards.


Other Affiliations: Chair, Global Public Policy Committee Working Group, International Forum of Independent Audit Regulators, 2013-present; past chair ... Past adjunct professor of law, Georgetown University Law School.

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

Personal: One child.

Cindy Fornelli
Executive director, Center for Audit Quality

Fornelli has good reason to celebrate as the CAQ gets set to mark its 10th anniversary: She has led it to become an indispensable source of information on the world of auditing, and of guidance and advice on how to make that world a better place.


Other Affiliations: Washington, D.C., Bar ... American Bar Association ... Accounting and Auditing Committee, International Corporate Governance Network ... Advisory Board, Ira M. Millstein Center for Global Markets and Corporate Ownership ... Council of Institutional Investors Markets Advisory Council ... 2016 NACD Directorship 100 ... National Association of Corporate Directors’ 2010 Blue Ribbon Commission on the Audit Committee ... Board of Trustees, SEC Historical Society.

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

Personal: Born 1960, Los Angeles.

Twitter: @cfornelli

Brian Fox
Founder and president, Confirmation.com

Fox and his automated confirmation service are at the forefront of the coming wave of change in auditing, as technology radically reshapes work practices and attitudes that are decades old.

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; Alumni Council ... Task Force for the Future, AICPA ... SMU Masters of Accountancy Advisory Board ... Tennessee Society of CPAs ... Mentor, Nashville Entrepreneurship Center ... Mentor, JumpStart Foundry ... Nashville Capital Network Advisory Board.

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

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

Twitter: @brianfoxcapa

Jeanette Franzel
Board member, PCAOB

Franzel has been an outspoken voice calling on auditing firms to improve the quality of their work, and urging firms to diversify their workforce, improve audit reports, toughen their audits of internal controls over financial reporting, and better serve the investing public.


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

Education: Senior Executive Fellow program, Harvard University ... George Mason University, MBA ... College of St. Teresa, IA Accctg, and Spanish.

Personal: Two daughters, recently launched.

Russell Fujioka
President, Xero US

Brought onboard to grow Xero’s North American market share, Fujioka has done just that, parlaying his deep industry knowledge and marketing smarts...
The most important issue facing the accounting profession involves its ability to maintain trust and confidence and follow fundamental core principles in light of a quickly changing environment of complex risks. — Jeanette Franzel

The inability of many current leaders to recognize and confront complacency and false urgency. — Sandra Wiley

For CPA firms, I think the most important issues are adapting to change and increasing the relevancy of services they provide to clients. Advisory services are becoming much more important as we move forward, and CPAs need to have strategic plans in place to make that transition. — Erik Aegirson

The proliferation of technology—and how investors use technology to consume financial information. — Russell Golden

The long-term globalization of accounting practices. Just as globalization has moved manufacturing jobs abroad, accountants face the risk of a shrinking pie for their core services. — Sharada Bhansali

For smaller firms in particular, the growing competition for tax preparation, accounting services and consulting by non-CPA firms. — Carl Peterson

We have always reported on the past, last year, last quarter, or last year. However, in today’s world of instant information, we must adjust. — Roger Harris

The most important issue facing the accounting profession is overregulation. It gives little wiggle room for firms to manage changing demographics in the accounting profession. — Ralph Thomas

Staffing and succession, which are very much related to each other, since if we had a plethora of young talent we would have less of a succession issue. — Joel Sinkin

How the profession embraces leadership and diversity is critical to its future success. — Olivia Kirtley

Clients are requesting new services that CPAs are not trained to fulfill. — Randy Johnston

I think the issue continues to be losing some of our best talent to corporate jobs. — Jeff Phillips

I believe change management is the most important issue facing accounting firms today…. The speed at which change is occurring is nothing short of breathtaking. — Jon Baron

Making earnings presentations relevant again. — Jack Cieslinski

The profession is faced with the need to transform. Change is not enough. Mindsets, skillsets and toolsets must all change to meet the client’s wants and needs. — Gary Boomer

I believe the biggest issue is that, more and more, non-licensed and non-degreed businesses are being loosely tied to the profession. It’s time for the “the profession” to clearly articulate our value and draw a clear distinction. If we lose this distinction, we run the risk of further commoditization. — Darren Root

How we will effectively transition firms from the current Baby Boomer owners to the next generation of owners. — Jason Blumer

Balancing the needs of clients with the needs of the staff that serves these clients. — Art Ruesel

The proliferation of fraud and cyberattacks, especially in the area of tax administration. — J. Russell George

The need for firms to offer more advisory services is growing, and clients are expecting more support from their accountants. — Angie Grissom

The issue of attracting and retaining women has become even a greater concern. — Rita Keller

The transition from current firm leadership to the next generation — the largest changeover in the profession’s history. — Taylor Macdonald

Maintaining an extensive understanding of the ever-changing and increasingly complex tax laws and compliance requirements has placed an incredible burden on accounting professionals. — Jason Marx

I see technological disruption as the most important issue. — Brian Peccarelli

To read the full responses of all the Top 100 candidates, visit Accounting Today.com.

J. Russell George Treasury Inspector General for Tax Administration

Quite possibly the hardest working man in the government, George oversees investigations into the performance of the IRS, and his reports documenting the failures and successes of the service are sought after by congressional members for direction in formulating policy.


Education: Harvard University Law School, JD … Howard University, BA.

Personal: Born in New York City.

Russell Golden Chairman, FASB

The position itself — head of the most important standard-setter in the country, if not the world — brings a certain amount of automatic influence, but Golden earns his own influence on top of that as he charts a steady course for U.S. GAAP in the post-convergence era.


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

Angie Grissom President, The Rainmaker Companies

Grissom and her group continue to find ways to bring fresh ideas to accounting firms, with a new Innovation Center, a national focus on women’s initiatives, a new leadership program and training offerings, and a host of other ways to help firms grow.


Other Affiliations: New Horizons member … Board member, CPA Consultants’ Alliance … Vice president, AFWA Music City Chapter … National Speaker’s Association … Association of Accounting Marketing … Nashville Rotary … Nashville City Club … Association for Talent Development.

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

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

Blog/Twitter: http://www.therainmakercompanies.com/blog / @agrisson

Jay Hanson Board member, PCAOB

Hanson is an engaged and influential voice on the board, frequently interacting with accountants and auditors at industry conferences and events. He has been involved in revamping the auditor’s reporting model while improving the PCAOB’s outreach to audit committee members and developing audit quality indicators, and has helped the board integrate more economic analysis into its standard-setting work.


Education: Concordia College, BA Business Administration, acctg. and Math.

Personal: Born 1957, St. Paul, Minn. … Two grandchildren.

Roger Harris President and COO, Padgett Business Services

A veteran leader and spokesperson for small business, Harris is familiar with the ways of Washington as he is with the intricacies of a tax return. He regularly appears at the IRS and before Congress to share his practical wisdom on tax policy matters.


Other Affiliations: National Society of Accountants … Past chair, Internal Revenue Service Advisory Council … National Association of Enrolled Agents … President, Padgett Foundation … Treasurer, Padgett Foundation …
Stephen Howe
Managing partner, EY
Double-digit growth isn’t the only way Howe makes his Big Four firm stand out: 21st century benefits and programs like corporate social responsibility sabbaticals and increased amounts of parental leave help, too.

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

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


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

Twitter: @stevenhowey

Sarah Johnson Dobek
President and founder, Inovatus Consulting

Johnson Dobek attacks the problem of growth from multiple angles, bringing her CPA firm clients valuable strategies on everything from marketing and social media to recruiting and retention — and she recently expanded her reach by taking the helm at the firm consortium CPAANET.

Career Highlights: President and founder, Inovatus Consulting, 2011-present ... President, CPAANET, 2016-present ... Director of marketing consulting, PDI Global Inc., 2008-2011 ... Marketing and HR director, Chicago accounting firm, 2002-2008.

Other Affiliations: Past Board member, AAM; content strategy chair; past Web site chair; past education chair; past president, AAM Chicago ... President, CPA Consultants’ Alliance.

Education: Purdue University, 2003, Business, Marketing and International Business.

Personal: Born 1981, Dallas ... Married to David ... One son, one dog, one cat.

Blog/Twitter: Practical Ideas for Growth www.inovatus.com/blog / @inovautus

Randy Johnston
Executive vice president and partner, K2 Enterprises; CEO, NMG

Johnson’s impact extends well beyond educating accountants about the sort of technology tools they should use; he’s equally influential in telling software developers what type of tools they should be building for the profession.


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

Education: Western Washington University, postgraduate ... James Madison University, postgraduate ... University of Central Oklahoma, postgraduate ... Wichita State University, 1981, MCS ... Kansas State University, 1977, BS CS Math ... Hutchinson Commu-
firms — particularly at the larger end of the spectrum — with growth, succession, transition and other issues.

There are also practitioners who share their expertise with the rest of the profession (and the world), often in interesting ways. Among this group we recommend two to your attention this year: Seth David, of Nerd Enterprises, who uses his YouTube channel, online “School of Bookkeeping” online hangouts, speaking engagements and other outlets to educate, inform and inspire; and Hector Garcia, a Miami-based CPA and QuickBooks expert who also uses YouTube, as well as his blog, webinars and live presentations to help the profession make the most of QBO, one of its most common tools.

They aren’t the only ones sharing their expertise. While we’ve long noted the influence of tax blogger Paul Caron, many others are now using the blogsphere to share tax information, analysis, insights and, occasionally, humor. This year we’re going to cite two, both of whom appear on Forbes.com: WithumSmith+Brown partner Anthony Nitti (who also writes on taxes for many other outlets, and frequently teaches well-received CPE courses), and Kelly Phillips Erb, a tax lawyer whose “Tax Girl” blog draws lots of eyeballs. And while we’re on the subject of taxes, you might want to keep an eye on Howard Gleckman, a fellow at the Tax Policy Center think tank, whose thoughts on tax policy are often sought after by the mainstream media.

Last but not least (and in no particular order), we want to include a number of people in the tech sphere:

- Mike Sabbatis, a veteran who recently returned to the field by joining workflow pioneer XCM Solutions.
- Marc Schiepe, who took the reins at Sage earlier this year.
- Josh Braunstein, who is in charge of research and learning (including the IntellIconnect platform) at Wolters Kluwer.
- Steve Mendelsohn, who runs Thomson Reuters’ Checkpoint research platform.
- Matt Rissell, whose TSheets scheduling and time tracking solution is generating major buzz.
- Brian Hamilton, whose SageWorks provides the profession with valuable analytical data.

— The Editors

**Ed Karl**

**Vice president of taxation, AICPA**

Karl is the voice of the AICPA at the IRS, the Treasury and Congress, where his tax policy recommendations always gain a hearing.

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

**Other Affiliations:** Greater Washington Society of CPAs ... Maryland Association of CPAs ... Global Accounting Alliance.

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

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

**Blog:** http://blog.aicpa.org/edward-karl CPA/

**Olivia Kirtley**

**President, IFAC**

At a time when international issues and opportunities are assuming an unprecedented importance, Kirtley is perfectly positioned to explain America’s viewpoint to the rest of the world, and vice versa.


**Other Affiliations:** Council member, past chair, AICPA; past chair, Board of Examiners ... Member, Integrated Reporting Council ... Non-executive director, US Bancorp; Papa John’s International; ResCare ... Past chair, Community Foundation of Louisville ... Board, National Center for Family Literacy; SOZO International ... Member, Bank Governance Leadership Network.

**Education:** Georgia State University, 1980, Master’s in Taxation ... Florida Southern College, 1972, BS Acctg.

**Personal:** Born 1950 ... Married to Dr. Louis Ray Kirtley ... Three sons.

**Ed Kless**

**Senior director, Sage**

Kless brings philosophy, theory and practice together in thinking about the profession, its future, and its interactions with, and in place, the broader world of business and the economy.

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

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

**Education:** Pace University, 1998, BA Liberal Studies.

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

**Allan Koltin**

**CEO, Koltin Consulting Group**

According to one firm MP who would know, it isn’t just the sheer number of accounting firm mergers that Koltin has helped midwife that matters, so much as the quality of the transactions, and the unrivaled knowledge of people and of firm dynamics that he brings to the table each time.

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

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

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

**Personal:** Born 1957, Milwaukee ... Married to Sharon ... Three children.
Education: Canisius College, 1991, BS Accrig.
Personal: Born 1968, Buffalo, N.Y. ... Married to Maryann ... One son.
Twitter: @markkoziel

Art Kuesel
President and owner, Kuesel Consulting

If you’ve decided to get strategic about growing your firm, Kuesel is on the short list of advisors you’ll want to consider for top-flight advice on marketing, sales and practice growth.

Career Highlights:
- President/owner, Kuesel Consulting, 2013-present ... Director of marketing consulting services, PDI Global/Kolin 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 and two-term board member, Association for Accounting Marketing; past president, AAM Chicago; past board member, AAM Wisconsin ... Volunteer education, WICPA ... Junior Achievement.
- Personal: Born 1974, Milwaukee ... Married to Colleen ... One son ... One King Charles Cavalier.
Blog: http://kueselconsulting.com/blog/

René Lacerte
Founder and CEO, Bill.com

Increasingly, Lacerte is the man everyone wants to know, as his Bill.com secures a central place in the functions of accounting departments and businesses across the country, and more and more software vendors look to integrate with, leverage, and otherwise work with his platform.

Career Highlights:
- Other Affiliations: Board member, Kent School ... Columbus, Inc.
- Education: Stanford University, 1989, MS Industrial Engineering; 1988, BA Economics and Quantitative Economics.
- Personal: Born 1967, Virginia ... Married to Joyce ... Two children.
Blog/Twitter: bill.com / @rlacerte

Taylor Macdonald
Senior vice president of channels, Intacct

Intacct’s rapid speed in forming new VAR and CPA partnerships can be attributed to Macdonald’s efforts, as can the vocal satisfaction these partners have expressed in the program and the product.

Career Highlights:
- 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

Samantha Mansfield
Director of corporate communications, CPA.com

Mansfield has emerged as a champion for CPA.com’s educational efforts, with an active social media presence, numerous speaking engagements, and an enthusiasm for helping firms implement profitable new business models using technology.

Career Highlights:
- Other Affiliations: Salvation Army ... Past board member, living history organization ... Past board member, HOA.
- Education: Hillsdale College, 2000, BA Business Administration/Marketing.
- Personal: Born 1977, Topeka, Kansas.
Blog/Twitter: www.cpa.com/blog / @smansfield

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

McCabe is a cheerleader for the independent tax preparer — those who love tax, but don’t necessarily want to be a part of a national franchise system or a larger accounting firm. Through his school and blog, he supports them with advice, education, business skills, and a forum.

Career Highlights:
- Other Affiliations: IRS Electronic Tax Advisory Committee ... Founding chair, Virginia Council of CEOs ... Board chair, Better Business Bureau of Central Virginia ... University of Richmond Dean’s Advisory Board ... State Council of Higher Education of Virginia College Advisory Board and Executive Committee ... Leadership Metro Richmond.
- Education: Pace University, 1983, ABD; 1981, Executive MBA ... Adelphi University, 1979, BS.
- Personal: Born 1944, New York City ... Married to Marilyn ... Two children.
Blog/Twitter: www.theincometaxschool.com/blog / @peoplestax, @taxschool

Scott McFarlane
Co-founder and CEO, Avalara

McFarlane has led Avalara’s accelerated growth over the past few years, through new rounds of funding, an expanded number of employees and office locations, and myriad strategic partnerships that capitalize on the urgent business need to automate complex tax calculations. This year, the company’s successful first user conference solidified its big presence in that space.

Career Highlights:
- Other Affiliations: NW Forum ... Information Technology Alliance.
- Education: Claremont McKenna College, 1979, Economics.
- Personal: Born 1957, Cleveland ... Married to Janet ... Two children.

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

In the past year, Marx moved from his old role serving small firms to a new position with a broader constituency — but that won’t change his focus on creating tools that are tailored to practitioners’ needs.

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

Jim McGinnis
Vice president, Accountant Segment, Intuit

With Intuit committed to leading its millions of small-business users into the cloud, McGinnis is committed to explaining its value to the accountants who advise those small businesses.

May you live in exciting times

As part of our Top 100 Most Influential People in Accounting report, we asked the candidates what has them most excited about the future of the profession. A sampling of their responses follows.

What isn’t exciting about the future of accounting? There are clients who are more engaged than ever and looking for collaboration and advisory services from their accounting professionals.
— Karen Abramson

What has me most excited may be what others most fear: That the profession is on the cusp of revolutionary change. The intersection of technology and generational shifts is dramatically redefining this profession.
— Joanne Barry

I see a lot of firms and accounting professionals that are open to new ideas and ways of thinking.
— James Doty

I’m most excited about the major transformation that is taking place in public accounting, whereby firms are reinvesting and retooling from being compliance shops to truly being in the business of helping their clients with their business and financial problems ... whatever they may be!
— Allan Koltin

The bright young leaders coming into the profession. They are smarter, more connected, more efficient, and less attached to “old ways and Ideas.” — Jennifer Wilson

I periodically travel around the country to meet with accounting students at various universities, and I am excited to see the enthusiasm these students demonstrate for a career in public accounting.
— Jay Hanson

Millennials and the change they are forcing in the industry is very exciting. With so many Boomers leaving the industry, the industry is being forced to look at new ways to do business. — Lauren Clemmer

The development of advanced data and analytics combined with another quickly emerging capability — cognitive computing — is exciting.
— Lynne Doughtie
The people! I am inspired by the passion, commitment, and hard work of accountants.
— Kimberly Ellison-Taylor

What makes me most excited about the future of accounting is how much fun it is! I know that sounds corny but I can tell you honestly that I am having more fun now than I ever have.
— Brian Fox

The opportunity to shape our future. We’re not stuck in a dull, never-changing industry or world. To the contrary, disruption is all around us. That gives us the opportunity to be disruptive as well, to help shape the way businesses and markets work in the future. That can be scary, but it’s really exciting, too!
— J. Michael McGuire

We now have a real opportunity to run a firm like an entrepreneur. We can take risks, price higher, and offer new and valuable services that earlier practitioners didn’t have the opportunity to offer.
— Jason Blumer

The rapid pace of change and innovation — we’re able to witness firsthand how the traditional role of the audit is changing due to the fusion of our physical, biological, and digital worlds. … What excites me most is the increased scope for higher-order thinking and insights that these changes will enable.
— Cathy Engelbert

I think the evolving and expanding role of accountants is something that’s very exciting, particularly for the younger people just joining the profession.
— Terri Polley

We are expanding and growing to be more inclusive in every way — not just in terms of racial diversity, but also with regard to roles, backgrounds, service offerings, and more.
— Jina Etienne

The profession’s changing, diverse workforce: Accounting and auditing will be shaped in exciting ways as the profession taps assertively into a talent pool that is growing more diverse culturally, that has shown fresh ways of thinking, and that can bring the profession critical new skillsets.
— Cindy Fornelli

The ramping up by firms to do a better job making their firms great places to work that train people well and develop them into leaders.
— Marc Rosenberg

I am particularly excited about globalization, not only in the accounting profession, but also across our middle-market client base.
— Joe Adams

Watching leading firms transform their business models from simply compliance/transitional services to more advisory model.
— Jim Boomer

The forward-looking nature of the profession. Moving from looking backwards to forwards to really help clients manage their businesses in a proactive real-time manner.
— Taylor Macdonald

Blockchain technology. Even though it was not invented by the accounting profession, it is destined to transform and disrupt how and what accountants do.
— Ron Baker

The trend of greater specialization by smaller and midsized firms.
— Bonnie Buol Rusczcyk

In my view, our profession is standing on the doorstep of a high-tech revolution, where big data, workflow tools, data analytics and artificial intelligence are the first steps being taken on the path to an amazing future.
— Todd Shapiro

Our profession will be retiring many Baby Boomers and, more than ever, we will be able to offer tremendous opportunity to young people from the Generation Xers, to the Millennials, and eventually to Generation Z.
— Denny Schleper

It will be exciting to see whether the profession can leverage the growing demand for some form of assurance on new matters such as interim financial information, cybersecurity, sustainability, and perhaps other areas as an opportunity to increase the relevance of the audit.
— Lewis Ferguson

It is the new breed of CPA firm that is producing outsized profits for its owners with strategic vision, exceptional talent, and fanatical client service. Mostly they are flying under the radar, driven by a single savvy owner or a small group of tightly knit partners.
— Rick Telberg

The pace of change. I enjoy the challenges brought on by change and I am ready to change and adapt to the new marketplace.
— Jim Bourke

To read the full responses of all the T100 candidates, visit AccountingToday.com.
Zach Nelson
CEO, NetSuite
Oracle’s recent acquisition of NetSuite put a big price tag on the value the company has been cultivating for years as an innovative and true cloud provider for fast-growing companies, with industry veteran Nelson leading the confident charge forward.
Other Affiliations: Board member, NetSuite … Board member, App Annie … Patent holder.
Education: Stanford University, MA, BS.
Personal: Born 1961, Omaha, Neb. … Married to Elizabeth … One daughter.

Caleb Newquist
Founding editor, Going Concern
Having found a new home at recruiting platform Accountingfly, Newquist’s Going Concern remains the virtual water cooler for young accountants (particularly at the larger firms), and now he’s branching out with his own content studio, particularly at the larger firms), and now he’s branching out with his own content studio, which aims to teach firms how to tell their own stories.
Education: Colorado State University, Fort Collins, Colo., 2003, MS … University of Nebraska at Kearney, 2002, BS.
Personal: Born 1979, Ord, Neb. … Married.
Blog: Twitter: http://goingconcern.com @go_yarn, @newquixst, going_concern

Jody Padar
CEO and principal, New Vision CPA Group
If enthusiasm alone could change accounting, it would have long since been remade according to Padar’s vision of the “New Firm.” But she matches her boundless enthusiasm with savvy communications and the ability to build connections across the profession, and that is what will make all the difference.
Other Affiliations: Author, The Radical CPA … Practitioners and Tech+ Steering Committee, AICPA … MACPA … Adjunct professor, Oakland Community College … Founder and president, Chicago QuickBooks Pro Advisor User Group.
Education: Northern Illinois University, 2005, MST … Saint Mary’s College, 1994, BBA.
Personal: Born 1972, Chicago … Married to Christopher … Two children.
Blog: Twitter: www.accountingtomorrow.com / @jodypadarcpa

Brian Peccarelli
President, The Tax & Accounting business of Thomson Reuters
Peccarelli is attuned to the massive technological disruption embodied in the move to the cloud, and is making sure his team is in the forefront, not least with tools like their award-winning new Onvio platform.
Other Affiliations: AICPA … American Bar Association … Texas State Board of Public Accountancy.
Education: Southern Methodist University, MBA … Hamline University School of Law, JD … Carthage College, BA Acctg. and Business Administration.
Personal: Born 1960, Wisconsin … Married to Jane … Two children.

Carl Peterson
Vice president of small firm interests, AICPA
There are more than 40,000 small firms in the country, and as one of Peterson’s fellow T100 points out, who can better represent them than a former small-practice owner? Peterson travels the country constantly, talking with, learning from, advising and representing exactly the kind of practice he knows so well.
Other Affiliations: Chair, Minnesota State Board of Architecture, Engineering, Land Surveying, Landscape Architecture, Geoscience and Certified Interior Design … Chair, Legislative Affairs Committee, MNPAC; trustee, MNPAC PAC.
Education: Kansas State University, 1980, BS BA/ Acctg.
Personal: Born 1958, Peoria, Ill. … Married to Joan … Three children (one of whom is a CPA).

Jeff Phillips
CEO, Accountingfly
Everyone’s looking for young accountants, and Phillips and his team at recruiting platform Accountingfly know how and where to find them, and what it will take to get and keep them.
Other Affiliations: Board, Greater Pensacola Chamber of Commerce … Board, Fiesta of Five Flags.
Education: Baylor University, 1998, BBA in Economics … Southern Methodist University, 2007, MBA.
Blog: Twitter: accountingfly.com / @jephphillips

Terri Polley
President and CEO, FAF
As the standards-setters she supports move further and further away from convergence, Polley is in a position to help them chart a new and independent course for the future.
Other Affiliations: AICPA … Connecticut Society of CPAs … Chairman, Greater Norwalk Chamber of Commerce.
Education: St. Francis College, 1982, BA Acctg. and French.
Personal: Born 1960, Brooklyn, N.Y. … Married … One son.
Blog: “From the President’s Desk” on www.accountingfoundation.org

Terry Putney
CEO, Transition Advisors
Putney and his partner, Joel Sinkin, are among the elite cadre of M&A consultants, having helped guide hundreds and hundreds of deals to completion. It’s not that scorecard that makes them stand out, though; it’s their deep knowledge of the inner workings of firms, and their ability to turn that into actionable advice.
Other Affiliations: Co-author, CPA Firm Mergers & Acquisitions … Immediate past president, CPA Consultants’ Alliance … AICPA … Florida Institute of CPAs … University of Kansas Accounting/Information Systems Advisory Council … Treasurer, Cornerstones of Care … Past president, Plaza Rotary Club … Past board member, Kansas City Ballet.
Education: College University of Kansas, Lawrence, 1978, BS Business-Acctg.
Personal: Born 1954, Kansas City, Mo. … Married to Mary … Two children.
Blog: cpaconsolidationsadvice.com/blog/

Jean Rogers
CEO and founder, SASB
Rogers has led SASB in rolling out a series of provisional reporting standards for measuring different companies’ environmental impact, is gathering feedback before finalizing the standards, and has begun offering guidance to help apply its findings.
Career Highlights: CEO and founder, Sustainability Accounting Standards Board, 2011-present … Principal, Ove Arup and Partners Ltd., 2001-2011 …
Darren Root
President and CEO, RootWorks

From his new Learning Center in Indianapolis, Root continues his long-time mission of serving as a trusted advisor to the nation’s trusted advisors — helping firms across the country run better, smarter and more profitably.

Career Highlights:
- CEO, RootWorks, 2006-present
- Executive editor, CPA Practice Advisor, 2008-2014
- President, Root & Associates, 1985-present
- Past member, CIPM Credential Committee, AICPA
- Past board member, Indiana Society of CPAs
- Author, The Intentional Accountant
- Co-Author, YOUility for Accountants: The Every-Myth Accountant
- Founder, Thomson Reuters Partner Summit
- Past director, Bloomington Hospital Foundation
- Past chairman, Bloomington United Way Campaign
- Guest lecturer, Indiana University School of Business
- Sherwood Oaks Christian Church
- Director, German American Bancorp

Education:
- Indiana University, 1984, B.S., Acctg.
- Personal: Born in Bloomington, Ind. Married to Michelle. Three children.

Marc Rosenberg
President, The Rosenberg Associates

Rosenberg’s ever-expanding series of monographs are the last word on managing a CPA practice, but he’s not about a static view of the profession. He keeps fresh by consulting with firms and mentoring young accountants.

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

Other Affiliations:
- Author, The Rosenberg Practice Management Book Series; The Rosenberg Blog
- Founding member, The New Horizons Group
- Founder, The Rosenberg MAP Survey; ICPAS; Founder, The Rosenberg Chicago Roundtable Groups

Education:
- University of Illinois, 1970, BS Acctg.

Bonnie Buol Rusczysky
President, bbr marketing

Rusczysky brings real-life experience both inside and outside of accounting to her job teaching accountants and other professionals how to successfully reach wider audiences, and has made a name for herself as one of a small group of experts helping to make professional services marketing more, well, professional.

Career Highlights:
- President, bbr marketing, 2009-present
- Marketing director, Windham Branlon, 2007-2009
- Product marketing manager, QAD, 2005-2007
- Client service director, FunctionDesign, 2003-2005
- Writer, Knock Out Communications, 2001-2003
- PR director, SportBrain, 2000-2001
- Client service manager, Deeley Trumble, 1995-1996
- International marketing manager, Turner Broadcasting, 1993-1995
- Marketing assistant, Mighty Distributing System, 1991-1993

Other Affiliations:
- Board member, Association for Accounting Marketing; former president and current board member, Atlanta Chapter
- Marketing committee chair, CPA Consultants’ Alliance
- Author, Take Your Marketing Online: Proven Ways to Grow Your Firm in the Digital Age
- Contributing author, Bridging the Gap: Strengthening the Connection between Current and Emerging Leaders in the CPA Profession
- Founding member, Atlanta Independent Women’s Network
- Past board member, National Association of Women Business Owners

Education:
- Georgia State University, 2001, MBA
- Troy State University, 1991, BA Journalism, Public Relations & French

Timothy Ryan
Chairman and senior partner, PwC

Ryan just took the helm at the start of July, but he brings a focus on client service and firm culture that will serve his Big Four firm well.

Career Highlights:

Other Affiliations:
- Governing Board, CAQ
- Trustee, SEC Historical Society
- Board, Children’s Aid Society

Education:
- Babson College, 1988, Accounting/Communications

Todd Shapiro
President and CEO, ICPAS

Shapiro is one of those using his state society as an incubator for new ideas in a range of areas (professional education is a big one), while at the same time advocating for more innovation in the profession nationwide.

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

Bill Sheridan
Chief communications officer, MACPA

Sheridan is both the medium and the message — his work for his association sets a high standard and offers an object lesson in social media and communications, while his writing and frequent public appearances offer insights into the future of learning, leadership and the profession.

Career Highlights:
- Chief communications officer, MACPA / Business Learning Institute, 2000-present
- Editor, CBSSports.com, 1997-2000
- Editor, Gaston, N.C., Gazette, 1995-1997
- Features editor/Sunday editor, Greensboro Newspapers, 1991-1995

Other Affiliations:
- Author, Look, Lead, Love Learn

Education:
- University of Buffalo, 1990, Communications

Denny Schleper
CEO, CliftonLarsonAllen

Even in an era of relentless M&A, Schleper and CLA stand out, frequently announcing a few deals at once (they probably announced one while you were reading this). But he isn’t neglecting organic growth, either, and is fast becoming a role model for regional firm leaders who want to make their mark.

Career Highlights:
- Chief executive officer, CliftonLarsonAllen, 2015-present
- Chief business officer
- Managing principal of offices; principal-in-charge
- Principal; manager; joined, 1989
- Chief financial officer, Good Shepherd Lutheran Home, 1987-1989
- Staff accountant to manager, McMahon Hartmann Amundson & Co., 1983-1987

Other Affiliations:
- AICPA
- Board member, Bridging Freedom
- CollaborateMD
- St. John’s University, 1983, BS Acctg. & Business

Personal:
- Born 1960, St. Cloud, Minn.
- Married to Cookie Jones Schleper
- One son, one daughter.
Joel Sinkin  
President, Transition Advisors  
Sinkin and his partner, Terry Putnam, rank among the top M&A consultants to accountants, a position that has given them a behind-the-scenes look at how hundreds of firms work—which they have turned into expertise they share generously with the rest of the profession.


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

Education: SUNY Brockport, 1981.

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

Rick Telberg  
Founder and CEO, CPA Trendlines  
Since his days as head of Accounting Today, Telberg has made a practice of introducing new voices, and he’s continuing that now as one as a one-man publishing house for a host of people with important things to tell the profession — to say nothing of the valuable insights he unearths through his research projects.

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, SmartPro, 2000-2001 ... Vice president, group publisher, editorial director, and editor-in-chief, Accounting Today, 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

Arleen Thomas  
Senior VP of management accounting and global markets, AICPA  
With the exam for the institute’s management accounting credential now fully established and its international joint venture with CIMA deepening, Thomas’ dual role looks likely only to grow in influence.


Other Affiliations: Past chair, XBRL International Inc. ... Consistory of the Reformed Church of Bronxville.

Education: Metropolitan State University, 1983, BA Acctg.

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

Twitter: @aetherncpa

Ralph Thomas  
CEO and executive director, NJCPA  
As a state society leader, Thomas is one of a handful of changemakers the profession looks to; as a voice for diversity and inclusion in the profession, he is in a class by himself.


Other Affiliations: Member, AICPA Foundation Board; past member, National Committee on Diversity and Inclusion, Strategic Planning Committee; AICPA Council, AICPA Group of 100, AICPA Pre-Certification Education Executive Committee; AICPA Peer Review Executive Committee Board, and CPA Vision Project ... Past member, CPA/SEA Board ... State Society Network Inc., Shared Services LLC ... Lifelong member and past national president, National Association of Black Accountants ... Trustee emeritus, Lehig University; member and past chair, Audit Committee ... Member, Accounting Advisory Boards, Lehig, Rutgers, Seton Hall, Montclair State University, Thomas Edison State College ... Chair, NASBA State Society Relations Committee ... Treasurer, Opportunity NJ ... New Jersey State Chamber of Commerce Cornerstone Initiative.

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

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

Twitter: @ralph_thomas

Dave Stende  
Managing partner and CEO, Eide Bailly  
Stende was re-elected last year, allowing him to continue pursuing a five-year vision for Eide Bailly that has seen the firm become one of the most aggressive acquirers in an aggressive field, with deals all over the West, the Southwest and the Mountain States.


Other Affiliations: Major Firms Group, AICPA; past member, Government Technical Standards Subcom-
Mary Jo White  
**Chair, SEC**

White’s no-nonsense approach to regulation continues, with strong warnings about “creative” accounting and non-GAAP numbers, but at the same time, her commission is working to streamline reporting.


**Other Affiliations:** Fellow, American College of Trial Lawyers ... Past board member, Nadasaq ... Council on Foreign Relations.

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

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

Sandra Wiley  
**President and shareholder, Boomer Consulting Inc.**

Accounting’s staff crunch is both a short-term crisis and a long-term problem, and Wiley is the go-to person for solutions to both, offering wise advice to firms and managers on hiring now, and then keeping those employees for the rest of their careers.


**Other Affiliations:** Author, *The Engaged Employer: The Journey Ahead, A New Roadmap to Collaboration in Your Firm* ... Chairman, CPA Consultants’ Alliance ... Creator, The P3 Leadership Academy ... Creator, CEO Advantage Program ... Team member, The Advisory Board ... Past committee member and marketing leader, Tech+ Conference Committee, AICPA ... Co-publisher, Performance3 ... Board president, United Way of Riley County ... Youth director, Trinity Presbyterian Church.

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

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

Blog/Twitter: www.thinkplangrow.net / @sandrawiley

Jennifer Wilson  
**Co-founder and owner, ConvergenceCoaching**

Already influential from her work inside firms as a consultant, Wilson continues to expand her influence with new surveys and programs on issues that are crucial to the profession, as well as frequent speaking engagements and webinars.


**Other Affiliations:** Founding member, CPA Consultants’ Alliance ... New Horizon Group ... Past chair, Education Committee, AAM ... CPAFMA ... CPA Leadership Panel ... Digital CPA Planning Committee; past chair, Tech Committee, AICPA; Workload Compression Task Force ... American Marketing Association ... Society for HR Management ... AICPA ... Founding member and board member, ITA ... Board and youth leader, Episcopal Church.

**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.

Blog/Twitter: www.blog.convergencecoaching.com / @jenlewilson

Joe Woodard  
**CEO, Woodard Companies**

Not content to sit back at the helm of his technology consulting and event empire, Woodard is always working to add new program perks, community improvements and innovative thinkers that challenge member firms to spark needed change at various levels of the network.

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

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

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

**Twitter:** @joe Woodward

Candace Wright  
**Chair, PCC**

As only the second person to head the council, Wright has a chance both to build on the work of her predecessor in serving the financial reporting needs of private businesses, and to leave her own mark in the area.

**Career Highlights:** Director, Postlethwaite & Netterville, 1995-present ... Accountant, Medi-Save Pharmacies Inc., 1983-1985.

**Other Affiliations:** Chair, Private Company Council, 2015-present ... PCPS Executive Committee, AICPA ... Financial Institutions Committee, Louisiana Society of CPAs ... Past president, Baton Rouge Chapter of CPAs ... Healthcare Financial Management Association ... Small Business Advisory Committee, FASB ... Board member, Baton Rouge Area Foundation; Adult Literacy Advocates.

**Education:** McNeese State University, 1983, BS Accdg.

**Personal:** Born 1962, Baton Rouge, La.