

Financial Services

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- Client Nurturing
- Retirement Planning
- Insurance
- Giving Strategies

FINANCIAL SERVICES
January 2009 Journal of Accountancy

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A Special Advertising Supplement in the
January 2009

Journal of Accountancy

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December 1, 2008

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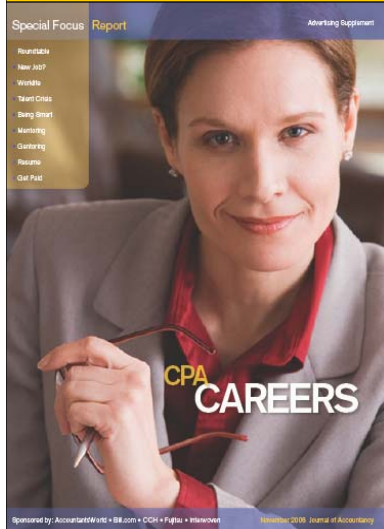
Financial Services is in focus in the January 2009 issue of *Journal of Accountancy*, offering readers best practices and research on financial services, and an executive roundtable of thought influencers from the corporate, public accounting and academic circles to share their insights.



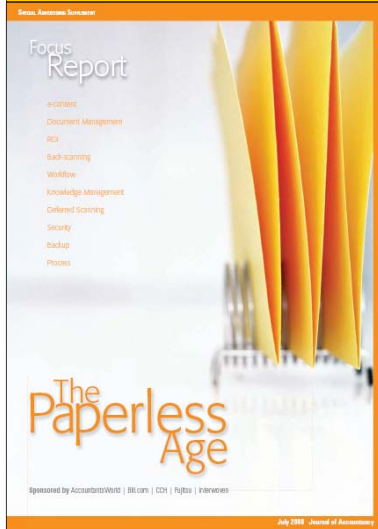
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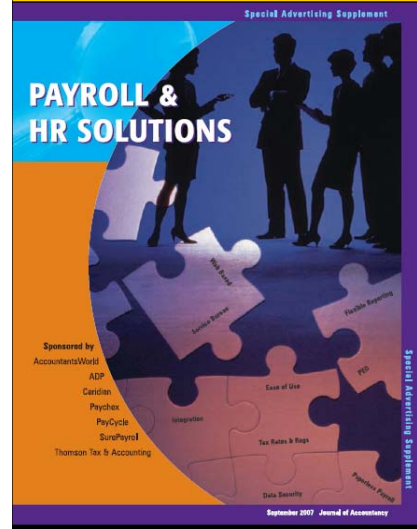
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Example of the Executive Roundtable

This is your opportunity to establish your organization's authority in the profession! A top executive from your company will have the chance to respond to selected questions from our readers and editors. We'll also include a headshot and brief bio of the participating executive from your company.

Special Advertising Supplement

Executive Roundtable:

We caught up recently with **Jonathan A. Baron**, President and CEO, Thomson Creative Solutions; **Dr. Chandra Bhansali**, President & Co-Founder of Accountants World, LLC; **Ray Jimison**, Sr. Vice President and General Manager Best Software - Specialized Business Solutions, and **Cary Rosenzweig**, Vice President of Intuit QuickBooks Payroll, to get their perspectives on important technology issues, opportunities and challenges facing CPAs today.



Jonathan A. Baron
Creative Solutions



Dr. Chandra Bhansali
Accountants World



Ray Jimison
Best Software



Cary Rosenzweig
Intuit QuickBooks

Gentlemen, from a technology or software solutions standpoint, what trends are having the greatest impact on CPAs today?

DR. CHANDRA BHANSALI (Accountants World): "Adoption. Most CPAs are still using only a fraction of the power of current technology. The Internet is the dominant core technology for accountants today. Accountant-centric technology will emerge as the most important technology for helping CPAs develop their practices and serve clients more effectively."

JONATHAN A. BARON (Creative Solutions): "Paperless office technology, including document management systems, paperless audit tools and Web-based client communication and collaboration tools. Firms that have transitioned to paperless offices are seeing immediate savings in paper, toner and storage space. More important, they're accessing information more conveniently, employing off-site staff, doing better planning for disasters and better serving clients through private portals."

Why is technology such an important issue today for CPAs and their small to medium size clients?

Jimison: "Since Sarbanes-Oxley [passed], there is heightened attention paid to reporting and accountability across the board -- at private companies as well as at public companies. Accounting and business management software is essential for helping these small to medium size businesses stay on track through thorough reporting and analysis capabilities."

Baron: "As the MAP survey confirms, finding and retaining qualified staff is the top challenge for most firms since they have to do more work, and offer more services, without adding staff. Seamless software integration and advanced data sharing techniques enable professionals to capture the original source of data and share them electronically, rather than entering the same data multiple times into various systems."

Bhansali: "Technology has greatly influenced the profession for the



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