



## **Kim Austin**

### **Avalara**

**Kim Austin is Director, Global Strategic Accounting Partnerships at Avalara.**

Kim's career includes 18+ years of experience in the accounting, document management, workflow, and cloud technology space. She's been named three times to Accounting Today's Top 100 Most Influential People in Accounting list, is a six-time CPA Practice Advisor 40 Under 40 honoree, and has been recognized by CRN as a Woman of the Channel for the past nine years. Kim currently serves on UC Santa Barbara PACE Customer Experience Advisory Board.

Kim's passion is delivering amazing service to her clients and her partners. Find her on Twitter & Instagram @MrsAustinNexus, or follow her blog: [www.viewfrommyshoes.com](http://www.viewfrommyshoes.com).



## **Darcy Boerio**

### **DAB Partners**

Darcy Boerio is President at DAB Partners, specializing in helping software publishers grow and strengthen their partner channels. She is also a co-host of Enterprise Software Podcast.

A 20+ year software industry veteran, Darcy has found her true passion lies in working with ERP channel partners and ISVs. She enjoys sharing best practices from the hundreds of VARs she's worked with over the years to help partners connect with ISVs and create great ERP experiences for their clients.

Previous Board roles including the Construction Financial Management Association (CFMA) Orlando chapter and the International Association of Microsoft Channel Partners (IAMCP) Tampa chapter. Darcy also currently serves on the Board of Directors for Acu-connect.

A native Oregonian, Darcy graduated from the University of Texas at Austin. She lives in the Tampa area with her husband, Tim (who is also in the software business), and their son.



## **Irfan Dossani**

### **Whitley Penn**

Irfan Dossani is Partner in Charge of Client Accounting & Advisory Services (CAAS) at Whitley Penn. In his position Irfan oversees outsourced accounting, ERP implementation, data analytics & transformation and technology integration teams. In his 25+ career in public accounting, Irfan has focused on tax compliance and consulting, financial advisory, process automations in the healthcare, real estate and technology space. Irfan is passionate about innovation and transformation and leads many of these initiatives for Whitley Penn. He is a doting dad of a soon to be high school senior daughter. Outside of leadership, he loves to travel, golf, meditate and read.

#### Professional Certifications

- Certified Public Accountant (CPA)

#### Education

- B.B.A in Accounting and Finance, Texas Christian University



## **John A. Fleischer**

**Senior Vice President and Chief Information Officer  
CBIZ, Inc.**

John A. Fleischer is the Senior Vice President and Chief Information Officer of CBIZ, a national provider of professional business services that help clients better manage their finances and employees. Prior to joining CBIZ, Mr. Fleischer held CIO roles at TTT Holdings (a Talisman Capital Partners company), Ferro Corporation, The Goodyear Tire & Rubber Company, and T-Systems. He began his career as an active duty Army officer and served in numerous senior leadership roles, which included directing large-scale systems development and integration projects in communications and computing.

Mr. Fleischer is a Distinguished Military Graduate of Princeton University, where he received his bachelor's degree in politics and economics. He holds a master's degree in business administration from The Ohio State University – Fisher College of Business. He is also an Honor Graduate of both the United States Army Logistics Management College and the United States Army Command and General Staff College.



## **Todd Perlman**

**President**

**BT Partners**

Todd Perlman is President of BT Partners, as well as a Principal with Miller, Cooper & Co., Ltd. He has worked in public accounting and has served as Controller and Operations Manager for several diversified companies in private industry. Todd has been with the firm since 1997.

Todd's responsibilities include supervision and management of the overall operations of BT Partners, including oversight of all implementation and consulting engagements. He has directly managed over seventy-five ERP implementations for small to mid-size distributors and manufacturers in diverse industries. Todd is certified in several complementary applications and has a demonstrated expertise in all facets of ERP and systems and business consulting.

Todd received a Bachelor of Science in Accountancy from Northern Illinois University, DeKalb and is a Certified Public Accountant. He is also certified in several popular software applications and has completed several continuing education programs. Todd is a CPA Magazine All-Star for excellence in manufacturing. He has also served as an active committee chair in the Illinois CPA Society and is a member of the American Institute of Certified Public Accountants (AICPA) and the Association of Supply Chain Management (ASCM, formerly APICS).

He resides in Chicago's North suburbs with his wife and two children.



## **Kane Polakoff**

**Principal, Managed Services & Outsourcing  
CohnReznick**

Kane has more than 25 years of experience developing and implementing strategic services and solutions to help businesses drive operational growth and value. His industry experience includes private equity, banking and financial services, insurance, manufacturing, automotive, and publishing.

His wide range of expertise includes strategic visioning and implementation; technology innovation, P&L management, global operations, and account management; client accounting advisory services; business process outsourcing, and management consulting. Kane's experience includes helping businesses restructure and reestablish operational excellence by transforming from a discrete service provider to a value-added integrated solution provider. In addition to working with US companies, he has led business process solutions deployment internationally, including in Australia, China, Europe, India, Israel, Mexico, and the Philippines.

Kane's thought leadership has been featured extensively in national publications including Accounting Today, CPA Practice Advisor, and US News & World Report. He has been a featured presenter for key industry organizations including the AICPA, Financial Executives International, Information Technology Alliance, and Digital CPA.

Before joining CohnReznick, Kane was the National Client Accounting Advisory Services (CAAS) Practice Leader for a major public accounting firm.

### Education

- University of California – Riverside, Bachelor of Science in Business Administration

### Affiliations

- Bill.com Accountants Advisory Council, Member
- BotKeeper, Strategic Advisor
- CPA.com CAS Advisory Council, Member
- Information Technology Alliance (ITA), Board Member and Leading CAS Track
- Intuit Large Firm Advisory Council, Member
- Jewish Federation of Metropolitan Detroit Audit Committee, Member



## **Michael T. Pynch, CMA, CPA**

### **Technology Partner/CIO**

#### **Wipfli**

Michael Pynch has more than 25 years of management and information technology consulting experience. He is a partner and leads the firm's internal technology team, providing strategic direction to those responsible for technology vital to achieving the firm's mission and vision.

#### **Certifications**

- Certified Public Accountant
- Certified Management Accountant

#### **Professional Memberships and Activities**

- American Institute of Certified Public Accountants (AICPA) - Member
- Institute of Management Accountants (IMA), Minneapolis Chapter
- Eau Claire Area Chamber of Commerce - Member
- Chippewa Falls Area Chamber of Commerce - Member

#### **Areas of Expertise**

- Strategic planning and execution
- Digital leadership
- Organizational development
- Business process improvement
- Product/Program management

#### **Education**

Marquette University

- Bachelor of science degree in business administration with specializations in accounting and international business

University of Minnesota, Carlson School of Business

- Master of business administration degree

#### **CONTACT INFORMATION**

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## **Brian Terrell, CPA** **BTerrell Group, LLP**

Brian Terrell founded BTerrell Group in 1991 and oversees management and strategy for this Dallas based provider of Sage Intacct financial management software and UiPath automation software and services. He grew up on a farm on the South Plains of Texas, graduated from Texas A&M University, and then started his career with Arthur Andersen & Co. Brian rides 150 miles a week as an avid cyclist and ride leader for local bicycle club. He and his wife Nancy reside in Dallas and recently celebrated the birth of their fifth grandchild.

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