



Geni Whitehouse, CPA.CITP, CSPM

President

Information Technology Alliance

Cell: 925 202 1980

E-Mail: geni.whitehouse@italliance.com

Web: www.italliance.com

Address: 2313 Roberto Street, Napa, CA 94558

Geni Whitehouse, CPA.CITP, CSPM is the President of the Information Technology Alliance (ITA). The ITA is the leading membership-based organization of owners and senior leaders of professional services firms that provide accounting and IT solutions to small and mid-sized businesses. ITA provides its members a collaborative environment in which they share information and build relationships that significantly enhance the way they and their clients do business.

In addition to her role as President of ITA, Geni is a consulting member of www.BDCoCPA.com, where she delivers advisory services to Napa Valley Wineries. She also provides online training to accountants seeking to deliver advisory services through www.TheImpactfulAdvisor.com.

Geni is a graduate of the University of North Carolina at Chapel Hill, where she holds a B.S. in Business Administration with a concentration in accounting. While at UNC, most of her electives were in computer programming.

Geni's accounting career began as a staff accountant in the tax department at Deloitte. She left Deloitte to take on a Corporate Tax role before building her own software consulting practice and accounting firm in Atlanta, Georgia. She took her practice to a local CPA firm and eventually made partner before deciding to take her career in a new direction. After working with a project management software provider and implementing PeopleSoft, she joined Navision Software as head of their CPA Alliance Program. She was promoted to Director of Product Management before leaving the company to go on the speaker circuit. From there, she joined ACCPAC as a VP in charge of their Accounting Program. When Sage acquired ACCPAC, Geni became VP of Product Management for the ACCPAC product and was transferred from Atlanta to Pleasanton, California.

She left Sage in 2007 and joined the BDCoCPA firm as a part-time team member and has worked there ever since. She continued to work on her speaking career, eventually delivering a TEDx talk (in 2011) and moving from educational to inspirational topics. In 2014, Geni joined wine industry veteran, Lesley Berglund, in founding and managing a remote bookkeeping business for wineries which they closed in 2022.

Geni is the author of "How to Make A Boring Subject Interesting: 52 Ways Even a Nerd Can be Heard" and is a regular presenter at Accounting and Technology conferences around the world.

She has received numerous industry awards over the course of her career including:

- Top 100 Influencer in Accounting, by Accounting Today Magazine
- Top 25 Thought Leader in Accounting, by CPA Practice Advisor
- Top 25 Most Powerful Women in Accounting, by CPA Practice Advisor
- LinkedIn Influencer- over 140,000 followers



Lissa Johnsen, CMC, CITP, CPA

Vice President

Information Technology Alliance

Work: (480) 515-2003, Ext. 2

Cell: (919) 272-0673

E-Mail: lissa.johnsen@italliance.com

Web: www.italliance.com

Address: 514 Daniels Street, Suite 361, Raleigh, NC 27607

Lissa Johnsen, CMC, CITP, CPA is the Vice President of the Information Technology Alliance (ITA). The ITA is the preeminent membership based organization of owners and senior leaders of professional services firms that provide IT solutions to small and mid-sized businesses. ITA provides its members with a collaborative environment where they can share information and build relationships that significantly enhance the way they and their clients do business.

Lissa has over twenty-five years of experience implementing business, accounting and human resources solutions. Her professional focus has been helping companies enhance their business processes through the implementation of technology solutions, making them more efficient and profitable as a result. Lissa has a B.S. in Accounting from Appalachian State University with a concentration in Information Systems graduating with honors.

In addition to her role as VP of ITA, Lissa also continues to provide contract business consulting services and project management through Business Technology Solutions.

Lissa holds many certifications, including being a:

- Certified Public Accountant (CPA);
- Certified Information Technology Professional (CITP);
- Certified Management Consultant (CMC);
- Plus certifications in many ERP and HRMS solutions.

Prior to joining ITA in 2016, Lissa was the Employer Solutions Practice Director and Consulting Manager for Net@Work. Lissa was also the founder and President/CEO of Business Technology Solutions for over 8 years until her business was acquired by Net@Work in the fall of 2008. Prior to founding Business Technology Solutions, Lissa was a partner in a large local North Carolina accounting firm where she developed the firm's IT consulting practice. Before this, she was a senior consulting manager and auditor with Price Waterhouse, an international Big Four certified public accounting firm, where she worked on many international and domestic system development and implementation projects for small and large clients alike.

Lissa is a published author, writing articles on accounting and technology for national and regional trade publications. In addition, she is a frequent speaker for and volunteers with a number of accounting and technology membership organizations including the Information Technology Alliance (ITA), American Institute of CPAs (AICPA), Society for Human Resource Manager (SHRM), Sage Software Insights conference, Carolina Visions Conference and the North Carolina Association of CPAs.

Some Business Awards:

- Outstanding Member in Business & Industry-NCACPA, 2010-11
- *Accounting Technology*-Technology Pacesetter 2002, 2003, 2004, 2005, 2006, 2007, 2008
- Featured on March 2003 cover of national magazine, *Accounting Technology*
- *Triangle Business Journal* - 40 under 40 award for 40 successful people under 40 years old in NC Triangle area – 2004
- Named Top 100 NC Small Business by Business Leader Media in 2008