



**Kim Austin**

**Solutions Sales Leader, Outsourced Business Accounting  
Creative Planning Business Services**

**A Division of Creative Planning LLC.**

Kim's career includes 20+ years of experience in the accounting, document management, workflow, sales tax compliance, ERP, and cloud technology space. She's been named four 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 ten times.

Kim's passion is delivering amazing service to her clients and her partners. Find her on Twitter & Instagram @RealCreativeKim, 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**  
**CBIZ**

John A. Fleischer has served as Senior Vice President and Chief Information Officer of CBIZ since August 2014. 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. Prior to these, he held senior IT roles at Volkswagen and Federal-Mogul Corporation. While at T-Systems, Mr. Fleischer also ran the U.S. consulting practice, which provided IT services to clients in a variety of industries. He began his career as a commissioned officer in the United States Army and served twelve years on active duty in numerous roles, which included directing large-scale systems development and integration projects in communications and computing. He is a Distinguished Military Graduate of Princeton University and received his Master of Business Administration degree from The Ohio State University. Mr. Fleischer serves on the Board of Trustees of the Lakeside Chautauqua Association.



## **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, Client Advisory Services**  
**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. He is a Certified Public Accountant (CPA) and member of the American Institute of Certified Public Accountants (AICPA). He is also a Certified Management Accountant (CMA) and a member of the Institute of Management Accountants (IMA). He is active in both the Eau Claire and Chippewa Falls Area Chambers of Commerce.

He has a broad consultant background with expertise in strategic planning and execution, digital leadership, organizational development, business process improvement, and product/program management.

His undergraduate education was at Marquette University in Milwaukee, WI where he received a bachelor of science in business administration with specializations in accounting and international business. He earned his master's degree in business administration from the University of Minnesota – Carlson School of Business.

A native of Wisconsin he resides in Chippewa Falls, WI with his wife and three children.



**Brian Terrell**  
**Managing Partner**  
**BTerrell Group**

Brian Terrell founded BTerrell Group in 1991 and oversees management and strategy for this Dallas based provider of Sage Intacct financial management software, which is the only accounting application ever to be designated by the AICPA as their Preferred Provider of Financial Applications. In addition, BTerrell's experienced developers tailor the application's business functionality to exact customer requirements, when necessary.

Born in Plainview, Texas, Brian grew up on a family farm where he learned to create value through hard work. From there, he received his Bachelor of Science degree from Texas A&M University before starting a career with Arthur Andersen & Co. In February 1991, Brian and his wife Nancy began practicing public accounting with Terrell & Terrell, CPAs. Within a year, the firm refocused all professional services exclusively on business software automation and eventually rebranded as BTerrell Group in 2008.

Brian enjoys cycling and leads group rides for the Plano Bicycle Association. He and his wife Nancy live in Dallas and enjoy spending time with their five grandchildren.

Brian Terrell, CPA  
Managing Partner  
BTerrell Group, LLP  
469.965.9968  
[brian.terrell@bterrell.com](mailto:brian.terrell@bterrell.com)