

2009 – 2010

Intuit Accountant and Advisor Customer Council Members



Beth Boyd, CPA - St. Louis, MO

2008-09, 2009 - 2010 Council Member

Beth established her accounting practice, Beth Boyd, CPA, P.C., in 1997, with a focus is on small business & individual taxes & consulting; QuickBooks consulting & training; payroll services; and remaining small enough to have rewarding personal relationships with our clients.

- ✚ Certified QuickBooks ProAdvisor since 1999
- ✚ Advanced Certified QuickBooks ProAdvisor
- ✚ ProSeries user since 1999

2009 - 2010 Council Member



Marsha Brooks, CPA – Scottsdale, AZ

Marsha started Marsha Brooks CPA PC in 1994 and has been a QuickBooks user from the beginning. The company offers services in small business accounting, outsourced controllership, nonprofit accounting and business, individual and fiduciary income tax returns.

- ✚ Certified QuickBooks ProAdvisor since 1999
- ✚ Certified Sleeter QuickBooks Consultant
- ✚ Member Int'l Academy Collaborative Professionals & Collaborative Divorce Professionals
- ✚ Accountants World Release for journal entries



Jaysson Gurwell, CPA – Anita, IA

2008-09, 2009 - 2010 Council Member

Jaysson recently established his own practice that will focus on QuickBooks consulting and training services. Jaysson previously spent 10 years at a full service CPA firm where he developed a very successful QuickBooks consulting niche service.

- ✚ Certified QuickBooks ProAdvisor since 2002
- ✚ Member of the Intuit Trainer/Writers Network since 2006
- ✚ Lacerte user since 2000



Jan Haugo – Phoenix, AZ

2009 - 2010 Council Member

Jan established her own firm Jan Haugo & Associates as an outsourced bookkeeping and QuickBooks consulting firm for use for small CPA firms to utilize for their clients and in-house staff. The company provides full range bookkeeping services and QuickBooks training Services and focuses on comprehensive maintenance. The firm provides an important link between small businesses and their CPA firms.

- ✚ QuickBooks consultant since 1995
- ✚ ProSeries user since 2005
- ✚ QuickBooks Payroll user since 1999
- ✚ Educator/ Trainer

2008-09, 2009 - 2010 Council Member



Jennifer Hoffman-Borges, MPP – Laguna Beach, CA

Jennifer established Balance Books in 2006 with the aim of “filling the gap” between business owners and their professional advisors. Balance Books provides process consulting and accounting maintenance solutions, mostly in the online environment, to business owners using QuickBooks software to manage operations.

- ✚ QuickBooks user since 1999
- ✚ Certified QuickBooks ProAdvisor since 2006
- ✚ Member, American Institute of Professional Bookkeepers, since 2006



James Jennings, CPA - Jeffersontown, KY

2009 - 2010 Council Member

Jim established his tax practice on a part-time basis over 18 years ago. Twelve years ago he left the corporate office and began focusing his practice on small businesses and their owners. Jim supports clients as their "CFO for Hire" providing accounting, accounting technology, small business consulting, tax planning and preparation, and bookkeeping services.

- ✚ QuickBooks ProAdvisor certified since 1999, Advanced Certified since 2007
- ✚ Enterprise & POS certified since 2008
- ✚ CCH ProSystems FX Tax user since 2000
- ✚ QBs Enhanced Payroll user



Jennifer Katrulya, CPA – Danbury, CT *2008-09, 2009 - 2010 Council Member*

Jennifer founded Business Management Resource Group, LLC in 2004. The company offers Outsourced Accounting, Payroll, CFO/Controller and Business Coaching services for closely held businesses.

- ✚ Certified QuickBooks ProAdvisor since 1999, Advanced & POS Certified in 2009.
- ✚ Member Intuit Solutions Provider Program & QuickBooks Affiliate Program
- ✚ CPA licensed in Connecticut and New York, Member AICPA and CT Society of CPAs
- ✚ RAN ONE Business Advisor



Fred Lake, EA - Slidell, La *2009 - 2010 Council Member*

Fred is a stockholder in Tax2u Inc with Susan Pittman, CPA, JD. The company offers outsourcing Accounting, Payroll, Tax, and Bookkeeping Services.

- ✚ QuickBooks user since 1999, ProSeries user since 1999, Intuit PayCycle user
- ✚ Certified QuickBooks Pro Advisor since 2006
- ✚ Educator, Trainer, Guest Lecture for LSU in Baton Rouge
- ✚ Operates a Virtual, Paperless Office using Outsourcing Assistants



Jim Leffel, CPA – Ritzville, WA *2008-09, 2009 - 2010 Council Member*

Jim is one of five shareholders at Leffel, Otis & Warwick, P.S., an agricultural based accounting practice with four full-time offices, all located in small farming communities. The firm's clientele are primarily farmers, farmers' cooperatives and other small businesses found in Eastern Washington.

- ✚ QuickBooks user since 1990
- ✚ Lacerte user since 1995
- ✚ Currently adopting Lacerte Document Management System
- ✚ Educator / Trainer



Linda Mohan, CPA – Mt. Clemens, MI *2009 - 2010 Council Member*

Linda has been on the staff of Carabell, Leslie & Company for over 10 years. Carabell, Leslie & Company, established in 1959, provides full service public accounting to clients in a wide range of industries.

- ✚ Advanced Certified QuickBooks ProAdvisor
- ✚ Creative Solutions User (list product and since when?)
- ✚ Member AICPA and MACPA
- ✚ Accounting and auditing, business and individual tax preparation and planning, business valuation, estate planning and taxation, forecasting, QuickBooks consulting.



Renee Mengali, CPA – Healdsburg, CA *2008-09, 2009 - 2010 Council Member*

Renee established Mengali Accountancy in 2003 as an outsourced bookkeeping firm. Today the firm also provides tax and consulting services and focuses primarily on the real estate management and investment industries.

- ✚ Advanced Certified QuickBooks ProAdvisor, POS Certified
- ✚ Lacerte user
- ✚ Certified Sleeter QuickBooks Consultant
- ✚ Implemented paperless office with automated workflows in mid-2007



Francine Morrow, CPA - Charleston, SC *2008-09, 2009 - 2010 Council Member*

Francine has been on the staff of Riser, McLaurin & Gibbons, LLP, CPAs for over 20 years. RM&G is a full service, local CPA firm that has offered a comprehensive range of services to its clients for 57+ years

- ✚ 18th tax season with Lacerte
- ✚ QuickBooks consultant since its inception in 1992, ProAdvisor since its inception in 1997
- ✚ DMS user since inception in 2004
- ✚ EasyACCT CWU for the last 4 years



Peter Renzulli, CPA – Bridgewater, NJ *2008-09, 2009 - 2010 Council Member*

Established Bookkeepers2Go in 2001, which offers a full range of bookkeeping and accounting services including CFO/Controller services, onsite and offsite bookkeeping, tax preparation and reporting, tax audit representation and negotiation, QuickBooks consulting, financial statements, and bill payment services.

- ✚ Clients include public companies, retail stores and restaurants
- ✚ Lacerte user since 1992
- ✚ Budget and forecasting models, operational procedures, inventory control procedures, business plans for clients seeking loans or venture capital
- ✚ Tax, litigation, business technology and employee benefit plan consultation



Ed Slovacek, CPA/CPIT – XXX, TX *2009 - 2010 Council Member*

Ed is a sole proprietor serving small business owners since 1974. Ed is passionate about helping his clients improve and grow their businesses by efficiently and effectively using QuickBooks.

- ✚ Member, QuickBooks ProAdvisor Program since 2001
- ✚ Certified Sleeter Group member, AICPA and TSCPA member
- ✚ Member, Rootworks Leadership Community 2009
- ✚ Lacerte user since 1986, QuickBooks Payroll user



Paul Smit, CPA – Lansing, IL *2008-09, 2009 - 2010 Council Member*

Paul established Paul J. Smit & Associates in 2002 after spending seven years in the audit practice of KPMG Chicago. Paul's firm provides accounting, auditing, tax, and QuickBooks consulting services to small businesses, individuals and not-for-profit organizations. Most of the firm's clients use QuickBooks.

- ✚ Lacerte tax user since 2002
- ✚ Lacerte DMS user since 2004
- ✚ Pro Series Fixed Assets Manager user since 2005
- ✚ Member of the QuickBooks ProAdvisor Program

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Tracy Sousa, ACQP - Mansfield, MA

Tracy is the founder of QuickSoft Solutions, a QuickBooks consulting company which has provided QuickBooks setup, training, troubleshooting, bookkeeping and CFO services to small and mid-sized businesses since 2003. QuickSoft also provides data file rebuilds and 3rd party software integration services.

- ✚ Advanced Certified QuickBooks ProAdvisor
- ✚ QuickBooks POS & Enterprise Suite Certified
- ✚ Intuit Solutions Provider and QuickBooks Affiliate
- ✚ Member, AIBP and National Association of Certified Public Bookkeepers

Ron Wolfe, Jr., Enrolled Agent – Baltimore, MD *2009 - 2010 Council Member*

Ron started with Asher & Simons, P.A. in 2009 and is on staff as a Senior Accountant. Asher & Simons, P.A. is a firm that has been in business for more than 30 years servicing clients in the Financial, Hospitality, Legal, Medical, and Retail sectors that range from small operations to those with gross revenues exceeding \$30 million.

- ✚ Member of NAEA, NSA & Maryland Society of Accountants
- ✚ Certified QuickBooks ProAdvisor, ProAdvisor program member since 1999
- ✚ ProSystems Fx user since 1999, Thomson Reuters Creative Write-up with Payroll user
- ✚ Intuit Payroll user

