



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.



Walt Goodfield

Partner, Chief Business Officer

RKL eSolutions LLC

For nearly thirty years, Walt has helped business leaders solve challenging problems through automation and optimization while applying best practices to processes and workflows.

Originally drawn to accounting in college, Walt found his way to business management software solutions through an internship and never looked back. Joining RKL in 2014, Walt holds experience selling, implementing and supporting the application of ERP software in mid-market enterprises. Walt has managed sales and delivery teams at three of the world's largest mid-market software publishers in his career.

At RKL, Walt is responsible for customer success, driving revenue growth through new customer acquisition and managing strategic partner alliances. He recently became a Partner in the firm with the goal of optimizing best practices and systems infrastructure across the organization.

PERSONAL

Walt currently resides in northeast Ohio with his wife and family. He enjoys exploring new destinations and playing golf as often as he can in the short summer months.



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
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Christi Whipple
Partner Marketing Director
BILL

She has worked in partner marketing for 11+ years, collaborating directly and indirectly with hundreds of different VAR, accountant, and ERP publisher partners. She has been leading teams for the past 7+ years. She has also been a member of the ITA for more than ten years, representing three different vendor member companies.

In June of 2023, Christi completed her MBA from the University of Washington. She has always been an Orange County, CA native. She currently resides in Coto de Caza with her husband. They have been foster parents for about four years.