Melissa Craig
Avalara

Melissa Craig is a Senior Manager at Avalara, leading a team of Strategic Alliance Managers focused on mid-market and enterprise-level partnerships. Her team supports both technology and VAR/SI partners, including platforms such as Acumatica, Sage BMS, Sage Intacct, Microsoft, SAP B1, Epicor, and Infor.

With over 25 years of experience in sales and channel development, Melissa has built a career centered on delivering technology solutions through strong partner ecosystems. She was recognized as a 2024 *Woman of the Channel* for her leadership, expertise, and vision within the industry.

Melissa recently celebrated nine years at Avalara, where she remains dedicated to advancing compliance solutions in the sales and use tax space. Based in Atlanta, Georgia, she enjoys spending her downtime on a patio listening to live music—often accompanied by her four-year-old English Cream Golden Retriever.

Melissa Craig
Avalara
Sr. Manager, Strategic Alliances
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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

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 with his wife. They have three adult children with a supermajority being accountants.

Kevin Sexton

Cohen & Co

Chief Information Officer

Kevin's ability to understand both business and technology, as well as his ability to build strong relationships, is key to providing solutions that best meet the needs of the firm and its clients. With prior experience at a Big 4 firm and in the financial services industry, he also brings a unique perspective to the continued evolution of the firm's technology environment and operational processes.

In his Chief Information Officer role leading Cohen & Co's Technology & Operations Services Group, Kevin combines his passions for driving business growth through innovative technology, improving processes, and creating a team culture in which people thrive and excel. He leverages his 30 years of experience delivering technology solutions and leading cross-functional teams to ensure his team provides the technology products, infrastructure and operational support needed to meet the high standards the firm's clients expect and deserve.

Kevin and his wife live in North Royalton, Ohio, and are the proud parents of three children. In addition to spending time with his family, Kevin enjoys playing golf and cheering on Cleveland's sports teams.

Kevin Sexton, CSM
Chief Information Officer
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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
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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.