



# 2025 CPA Firm Tech Report

*Expert Guidance on Where to Invest Next*

## Executive Summary

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## *Where Is Firm Tech Heading?*

Accounting technologies (firm tech) have exploded over the past 12 months. With artificial intelligence (AI) alone, the industry saw a host of new applications and benefits. Some of the more popular applications and benefits are as follows:

- **Predictive Financial Forecasting:** AI can provide predictive insights for financial forecasting using huge volumes of data effortlessly. Firms can offer more timely and accurate advice to clients.
- **Audit Automation:** AI can reduce audit risks and enhance audit integrity by detecting anomalies with precision.
- **Proactive Recommendations:** Financial recommendations based on client data, industry benchmarks, and macroeconomic indicators can now be proactive and include personalized insights and strategic planning.
- **Data Protection:** Through encryption, anomaly detection, and real-time monitoring, AI can reduce the risks of data breaches and their associated costs.
- **Scalable Solutions:** Firm workloads can increase with AI without major infrastructure changes because of the tech's scalability.

This report details how to take advantage of these and other benefits. Within, we include several models and charts (CPA Firm Digital Maturity Model, a Firm Tech Ecosystem chart, and an Accounting Artificial Intelligence Ecosystem chart), address five critical technology challenges that are keeping firms from embracing AI applications and benefits, and take a deep dive into AI trends and considerations. Accounting firms have the ability to respond and adapt quickly, and that is good news. But there are barriers. The five challenges we've identified in this report are:

- Overwhelming Choices and Change Management Overload Lead to Decision Paralysis
- Leadership Hesitation and Resistance to Change
- Justifying Costs and Proving Return on Investment
- Growing Security Risks
- Gaps in Revenue, Skills, and Expertise

# Meet the Experts

This Insights report on CPA Firm Tech brings together the expertise of a distinguished panel of professionals who consult with CPA firms daily on technology adoption and implementation. We are proud to present their latest thoughts on where firms should invest in technology next.

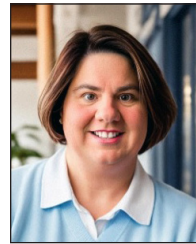
## Arianna Campbell



Arianna Campbell is a shareholder and chief operating officer at Boomer Consultings Inc., where she helps accounting firms focus on the people part of change by leading process improvement initiatives that increase capacity to create more value internally

and externally. Arianna is adept at blending concepts from process improvement and change leadership to drive innovation and continuous improvement. Arianna facilitates the development and cultivation of process managers, project managers, and change leaders in the Boomer Process Circle. She also enjoys the opportunity to share knowledge through regular contributions to the *Boomer Bulletin*, *CPA Practice Advisor*, and other industrywide publications, as well as public speaking at industry conferences. She's been honored several times as one of *CPA Practice Advisor's* Top 25 Most Powerful Women in Accounting and *Inside Public Accounting's* Most Recommended Consultants.

## Jody Padar, CPA



Jody Padar, CPA, is a leading voice of transformation in the accounting profession. Known as *The Radical CPA*, she pioneered the cloud firm model and has been recognized on *Accounting Today's* Top 100 Most Influential People list for over a decade. A three-time

author and sought-after adviser, Jody has helped firms modernize through digital transformation, with leadership roles spanning traditional firms, cloud-based practices, and high-growth startups, including Botkeeper and April. Today, Jody is driving the next evolution of the profession through AI-X, an AI-powered firm model that integrates real-time leadership coaching, advisory innovation, and scalable growth strategies. Through AI-X, she is equipping CPA firms to lead confidently in the age of artificial intelligence, transforming how they operate, deliver value, and evolve. To connect with Jody and explore the future of accounting, follow her on LinkedIn, X, Instagram, and Facebook, or visit [www.Radical.CPA](http://www.Radical.CPA).

## Ellen Choi



Ellen Choi is the CEO/founder of Edgefield Group, a consultancy that helps CPA firms with AI and innovation to drive growth and improve efficiency. She is part of CalCPA's generative AI task force and speaks on AI regularly (i.e., *Accounting Today's* AI Summit).

Her past includes co-founding Aiwyn, a technology company that helps accounting firms digitize their practice management. Aiwyn works with more than 130 of the Top 500 CPA firms and has raised \$113 million, led by KKR and Bessemer Venture Partners. At Aiwyn, she held roles of chief product officer and COO over a four-plus year period.

## Garrett Wasny, MA, CMC, CITP/FIBR



Garrett Wasny, MA, CMC, CITP/FITP, is a certified management consultant and widely recognized AI evangelist, digital navigator, and innovation amplifier. Honored in 2025 with the prestigious MYCPE Award for groundbreaking contributions to AI

and technology education, Garrett has trained tens of thousands of CPAs and accountants in over 60 countries. Garrett's dynamic training unlocks new dimensions of AI synergy that inspire experimentation, drive collaborative intelligence, and transform CPAs into chief future officers.