

Highlights from the

# Boomer CIO Circle

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## Topic Highlights from The Boomer CIO Circle™ 2025 Spring Meeting

The Boomer CIO Circle™ is a community of IT leaders from forward-thinking firms who are committed to aligning technology and strategy at the highest levels. Members focus on developing the skills necessary to improve leadership beyond technology. Learn more at [www.boomer.com](http://www.boomer.com).

This February, our members met in Puerto Vallarta, Mexico. The discussions were lively and insightful as each member shared perspectives on the challenges and opportunities facing their firm and the profession.

- **Innovation in Action**
  - In this session, we examined the biggest innovations happening in the world today, including CoPilot, a financial statement assembly tool, bots to support employees, and a tax law GPT.
  - Our members brought exciting innovations they've discovered recently to present to their peers. We awarded a prize to the best concept presentation.
  
- **Book Discussion**
  - Before the meeting, members were asked to read the book *The Geek Way: The Radical Mindset that Drives Extraordinary Results* by Andrew McAfee and come prepared to discuss.
  - During the meeting, members discussed how the book resonated with them and where they see opportunities to apply the lessons in their firms.
  
- **Sponsor Highlight: Inflo**
  - Our sponsor, Inflo, provided an overview of who they are and how they serve accounting firms.
  - Mark Edmondson, President and CEO, and Rob Lemmon, Chief Audit Partner, discussed Inflo's digital audit platform and how it can transform a core service offered by CPA firms.
  
- **CIO Exchange/Accountability Review**
  - Members shared their top three strategic projects and best practices from real-world experiences during an interactive roundtable discussion.
  - Some of the projects shared include an automation that saved 5,500 hours of work, automating closing of binders after busy season, and modernizing engagement letters.
  
- **Data Governance Workshop**
  - We explored the critical role of data governance in enhancing security, compliance, and operational efficiency within our firms.
  - This session provided actionable strategies for managing data integrity, privacy and accessibility in alignment with regulatory standards. Members learned how to implement effective frameworks and tools to safeguard their data.

- **Sponsor Highlight: Aiwyn**
  - Our sponsor, Aiwyn, provided an overview of who they are and how they serve accounting firms.
  - Justin Adams, CEO, provided an overview of Aiwyn and discussed how their technology serves accounting firms.

It's impossible to cover everything that we discussed at the last Boomer CIO Circle meeting in this short summary. However, the trends described in this report should give you great insight into the technology challenges and solutions that firms are considering today.

### **An Invitation to Participate in The Boomer CIO Circle™**

To learn more about the Boomer CIO Circle community, please visit [www.boomer.com/cio](http://www.boomer.com/cio).

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