



## JORDAN C. KLEINSMITH

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### RECENT PRODUCTS

Jordan was the originating Product Mgr for the following:

- ❑ [Drake Workflow](#)
- ❑ [Drake Hub](#)
- ❑ [Liscio Smart Organizers](#)
- ❑ [Liscio Smart Delivery](#)

### SKILLS

- ❑ A “full-stack” Product Mgr with experience spanning Strategic, Technical, & Sales/Mktg. functions
- ❑ Highly-rated presenter with executive presence
- ❑ Ability to communicate technical subjects to non-technical audiences
- ❑ Adept at deriving clear requirements from observed customer behavior and requests
- ❑ Effective and efficient researcher using a variety of methods

### JORDAN

With a cross-functional background and strategic mindset, Jordan Kleinsmith is a *Pragmatic Institute* certified (PMC-IV) Product Manager with extensive experience in both the B2B software and professional tax & accounting services markets.

### EXPERIENCE

#### Senior Product Manager — Taxwell / Drake Software

Part-Time Remote Contractor — April 2025 to October 2025

Responsible for defining, designing, and launching both Drake Hub and Drake Workflow

- ❑ Successfully launched Drake Hub & Workflow within 5 months to customer acclaim

#### Principal Product Manager — Liscio, Inc (Liscio.me)

Full-Time Remote — January 2024 to February 2025

Responsible for building Liscio’s line of tax automation features for tax professionals.

- ❑ Designed and built an extensive taxonomy for tax form and tax data classification
- ❑ Successfully designed, built, and delivered Smart Delivery for 1040 returns in 5 months

#### Senior Manager — Tax Technology, Marcum LLP

Full-Time Remote — May 2022 to June 2023

Oversaw the ongoing transformation of the Tax Technology used at Marcum LLP, including through the building of new technology in-house to transform the tax practitioner’s workflow.

- ❑ Successfully transitioned Development and Analyst teams to using Azure DevOps
- ❑ Launched and managed first Tax Technology Intern program

#### Director of Product Mgmt. — Advisory, Thomson Reuters

Ann Arbor, MI / Nearby Home Office — July 2020 to January 2022

Responsible for a portfolio of both desktop and web-based tax planning and advisory products.

- ❑ Onboarded a new development team and product owners and shipped a new alpha product within a month, followed by a functional customer beta within three months.
- ❑ Achieved a run rate in excess of \$1.1 million for new SaaS product in under two years

#### Director of Innovation, Thomson Reuters

Dexter, MI / Ann Arbor, MI — January 2018 to July 2020

Manager of ongoing innovation projects and TR’s face of innovation to the profession.

- ❑ Coached two teams through the process of securing funding (\$100,000 each) for innovation projects, also acting as Product Owner and UX Designer for one project
- ❑ Named to the *CPA Practice Advisor’s* “20 Under 40 Superstars” list (2018)

#### Senior Product Manager — Tax & Innovation, Thomson Reuters

Dexter, MI / Ann Arbor, MI — April 2012 to January 2018

Developed market research and go-to-market strategy for TR’s portfolio of tax products.

- ❑ Named to the *CPA Practice Advisor’s* “40 Under 40” list (2013)
- ❑ Founded and managed two customer advisory boards

#### Account Representative, Thomson Reuters

Dexter, MI — March 2011 to April 2012

#### Senior Support Representative, Thomson Reuters

Ann Arbor, MI — October 2006 to March 2011

### EDUCATION

#### Hillsdale College

B.A., History, 2002-2006

### REFERENCES

Available upon request.

### WEBSITE

[jordankleinsmith.com](http://jordankleinsmith.com)