

30th Annual

# 2014 California Accounting & Business Conference Program

## DAY ONE, Monday, June 2

**Conference registration and coffee service** 7:30-8:20 am 2nd floor Conference Complex - take stairs or elevator to '2'

FREE Session 1 8:20 - 10:00 am 2nd floor LAX Hilton Conference Session Room. General Session (2 CPE credits)

### What's New In Technology For Your Accounting Practice, What's Happening In Mobile, Cloud, Big Data, iPads, iPhones. Predictions for 2014.

**Dana 'Rick' Richardson**, CPA.CITP.CGMA, Richardson Media & Technologies, Canton, CT

This year will be Rick's 34th year of forecasting technology futures for both for your practice and personal technologies. Rick does the research you don't have the time to do and because he's a CPA, he knows what you need to run your business and your clients' business. You won't believe how much you'll learn from this 100 minute session.



Dana 'Rick' Richardson

10:00 am - 4:00 pm **Exhibits open** CPE sessions will have scheduled breaks to see the exhibits in 3 halls: International, Pacific and Plaza on the lower level. Exclusive show viewing time 10-11 am.

11:00 am - 2:00 pm **Cash lunch service in the exhibits** Plaza exhibits, lower level of the LAX Hilton.

Session 2 11:00 - 11:50 am 2nd floor LAX Hilton Conference Session Room. General Session (1 CPE credit)

### Keynote: Building the Future – Unleashing the Small Business Ecosystem.

**Jim McGinnis**, Vice President Accountant and Advisor Group, Intuit

More than 5 million small businesses use QuickBooks. This keynote will focus on how Intuit is developing and delivering the products and services accounting professionals need to more efficiently serve their small business clients.



Jim McGinnis

12 noon - 1:20 pm Session 3 **Break in the exhibit hall.** Exclusive show viewing time to see the exhibits in 3 halls: International, Pacific and Plaza on the lower level. Cash lunch service in the exhibits Plaza exhibits, lower level.

1:20 to 3 pm Session 4 Concurrent with CPE sessions **Free Walking Tour** on the Show Floor, conducted by **Jim Baker**, Publisher, *CPA Practice Advisor* and **Gail Perry**, CPA, Editor-in-Chief, *CPA Practice Advisor*. Plaza Level. Please assemble 10 minutes early.



Jim Baker



Gail Perry

**Concurrent Sessions** Select one of two 2nd floor LAX Hilton Conference Session Room. (2 CPE credits)

Session 5: 1:20 - 3:00 pm

### Inspector Gadget – You Might be Buying Yesterday's Technology.

**David Cieslak**, CPA.CITP, GSEC, Principal, Arxis Technology, Inc., Simi Valley, CA

With technology innovation continuing at a dizzying pace, is your organization investing its technology budget wisely? Are you concerned you might be buying yesterday's technology with little or no hope for return on investment? If these questions sound all too familiar, attend this session to get the guidance you need on the latest in technological advancements and trends for 2014 and beyond. From cell phones to tablets, Ultrabooks and the cloud, discover how these gadgets can be utilized to streamline processes, improve control, increase efficiencies and ensure your organization is properly poised to fully leverage technology in the years ahead.



David Cieslak

Session 6: 1:20 - 3:00 pm

### Set a Course Toward the Cloud with QuickBooks Online and QuickBooks Online Accountant.

**Stacy Kildal**, Advanced Certified QuickBooks ProAdvisor, Intuit and Co-host of radiofreeqb.com

This course will introduce you to QuickBooks Online (and why QuickBooks Online clients are important to your practice). We'll help you identify when QuickBooks Online is right for your client, and give guidance on how to determine what subscription level you should recommend. We'll provide an overview of features, pricing and special considerations, as well as how you can use 3rd party add-on software to offer a rich, cloud-based accounting system to the clients who require more flexible access than the desktop editions offer.



Stacy Kildal

3:00 - 4:00 pm **Break in the exhibit hall.** Exclusive show viewing time. Plaza level, lower level of the LAX Hilton. Show concludes at 4 pm.

**Concurrent Sessions** Select one of two 2nd floor LAX Hilton Conference Session Room. 1 CPE credit)

Session 7: 4:00 - 4:50 pm

### 10 Steps for Moving to the Cloud Without Creating a Tornado.

**Doug Sleeter**, President, The Sleeter Group, Inc., Pleasanton, CA

Are you planning to move your applications and data to the cloud, but you're afraid of creating a disaster? Deciding to move to the cloud is the first step, but then what? How many "connected" systems need to be moved, and in what order? If you move the accounting software, what about the payroll, the merchant accounts, the ecommerce, and all of the other business processes? It's critical that you plan the transition carefully and this session will give you a 10-step checklist to avoid creating a tornado.



Doug Sleeter

Session 8: 4:00 - 4:50 pm

### Social Media - Twitter, Facebook, Messaging for CPAs and Their Clients.

**Daniel Hood**, Editor-in-Chief *Accounting Today*, SourceMedia, New York, NY

CPAs and accounting professionals are using social media to communicate quickly, on-the-road, at home, in the client's office. Keep up with your active clients with social media.



Daniel Hood

Show concludes at 4 pm. Conference concludes at 4:50 pm.

Program and speakers subject to change

Register today for the low-cost CPE educational program at \$45/day with 6 CPE credits. \$80 for 2 days with 12 CPE credits. The CPE is accredited by the NASBA. Sponsor Identification number is: 104942.

### 2014 Tax and Accounting Technology Innovation Awards Sponsored by The CPA Practice Advisor

**Mon, June 2, 4-6:30 pm** in a reception location to be designated within the LAX Hilton Hotel. This year, a total of five awards are awarded based upon nominations received from the profession. Exhibitors are invited to attend this 10th Annual reception and award presentation.

## DAY TWO, Tuesday, June 3

**Conference registration and coffee service** 7:30 - 8:20 am 2nd floor Conference Complex-take stairs or elevator to '2'.

FREE Session 10 8:20-10:00 am 2nd floor LAX Hilton Conference Session Room. General Session (2 CPE credits)

### Firms Winning in Today's Reality.

**Teresa Mackintosh**, President & CEO, CCH Tax and Accounting US, Riverwoods, IL

Firms that integrate technology into their everyday business are generally more successful and profitable. Leveraging technology enables these firms to overcome staffing challenges, build/enhance client relationships, and keep pace with change in the profession more effectively than those that don't.



Teresa Mackintosh

10:00 am - 4:00 pm **Exhibits open** CPE sessions will have scheduled breaks to see the exhibits in 3 halls: International, Pacific and Plaza on the lower level. Exclusive show viewing time 10-11 am.

11:00 am - 2:00 pm **Cash lunch service in the exhibits** Plaza exhibits, lower level of the LAX Hilton.

10:20 - 12 noon Session 11 Concurrent with CPE sessions **Free Walking Tour** on the Show Floor, conducted by **Jim Baker**, Publisher, *CPA Practice Advisor* and **Gail Perry**, CPA, Editor-in-Chief, *CPA Practice Advisor*. Plaza Level. Please assemble 10 minutes early.

**Concurrent Sessions** Select one of two 2nd floor LAX Hilton Conference Session Room. (1 CPE credit)

Session 12 – 11 - 11:50 am

### Lock Down Your Networks Now.

**Adrian Stern**, CPA, Clumeck, Stern, Phillips & Schenkelberg, Encino, CA

**Rolfe Pope**, Department of Defense, Retired



Adrian Stern



Rolfe Pope

Network security for CPA firms and their clients is critical in today's changing World, Adrian Stern and Rolfe Pope will cover network security risks, protecting your network and keeping the bad guys away from both networks and computers. Think how Target Stores Corporation had their network security compromised. Learn how to implement best practices for your own benefit.

Session 13 – 11 - 11:50 am

### Disruptive Technologies: Catching the Wave.

**Gregory L. LaFollette**, CPA, CITP, CGMA, CPA2Biz, Inc., Sioux Falls, SD

This session will examine the multitude of disruptive technologies that are destroying some of our clients' traditional business models. Trusted advisors need understanding of the threats and be ready to help your clients. You'll be amazed (and probably troubled) as we discuss today's buggy whip manufacturers.



Greg LaFollette

12 noon - 1:20 pm Session 14 **Break in the exhibit hall.** Exclusive show viewing time to see the exhibits in 3 halls: International, Pacific and Plaza on the lower level. Cash lunch service in the exhibits Plaza exhibits, lower level of the LAX Hilton.

**Concurrent Sessions** Select one of two 2nd floor LAX Hilton Conference Session Room. (2 CPE credits)

Session 15 1:20 - 3 pm

### Automating your Tax Workflow.

**Christina Wiseman**, MBA, Product Manager, Web Services & Mobile, Thomson Reuters, Dexter, MI

Automating your tax workflow will speed your operations, increase your clients satisfaction and automate your internal practice operations. Thomson Reuters is a leader in business, finance, accounting, market data and technology. Hear from an expert in the field.



Christina Wiseman

Session 16 1:20 - 3 pm

### Introducing the Firm of the Future.

**Edward Kless**, Senior Director, Partner Development and Strategy, Sage North America, Allen, TX, (invited)

Your accounting firm will be more effective when it becomes a knowledge firm rather than a service firm. We will explore two business models: the firm of the past and the firm of the future. Learn about the four transformations for your CPA firm to make the transition successfully.



Edward Kless

3:00 - 4:00 pm **Final exhibit hall opportunity.** Collect prizes, Free software, exhibitor drawings, last session of the day. Exclusive show viewing time – See exhibits in all 3 exhibit halls on 2 levels of the LAX Hilton. Show concludes at 4 pm.

Session 17 – 4-4:50 pm General Session 2nd floor LAX Hilton Conference Session Room. (1 CPE credit)

### What's Your Business Worth? Sell Your Business or Buy a New Business? What you Should Know About Valuations, Financing, and Payout Options.

**Chris Frederiksen**, CEO & Chairman, 2020 Group USA, Corte Madera, CA

When you decide to sell your business, learn how to value your practice accurately, and how to maximize value. How to grow your business through acquisition, continue your business with a partner; or leave your business in a sales and payout option. Find out your options if you are looking to make a change in your business. What you should know about valuations, financing and payout options.

Chris Frederiksen, CPA, is an internationally known consultant, author and seminar leader working exclusively within the accounting profession. For the past several years, Chris has been named by *Accounting Today* as one of the *Top 100 Most Influential People in the Accounting Profession*. Chris is CEO, 2020 Group USA, actively helping firms with transition issues including retirement, succession, partner admission, mergers and acquisitions.



Chris Frederiksen