

2017 California Accounting & Business

Show & Conference June 6-7, 2017 Tues - Weds LAX Hilton Hotel, Los Angeles

5711 West Century Blvd, at the LAX Airport, off the 405 Freeway

New Accounting Technology for CPAs and your Clients. Keep Pace with Changing Technology at the 2017 CPE Program and Free Show.

Sponsored by:



SAVE TIME AND MONEY
Register for the **FREE Show**
and Low Cost CPE at **\$55/day**

FREE KEYNOTES - 2 CPE credits each

TUES, JUNE 6
8:20 - 10 am



Rick Richardson
CPA, CITP, CGMA,
Richardson
Media & Technologies



Jon Baron President,
Professional, Tax &
Accounting
Thomson Reuters

WEDS, JUNE 7
8:20 - 10 am

Accounting technology, Online Systems, Financial Services, iPads, iPhones, Cloud, Mobile, Payment Systems, Client Services on the road and at your home office.

CPE sessions are all new at the low cost of \$55 per day with 6 hours of CPE credits, or \$100 for two days with 12 hours of CPE credits. The CPE is accredited by National Association of State Boards of Accountancy (NASBA)

See and hear the newest accounting, business, finance, tax, payroll, cloud, mobile, on-line, networks. Efficient two day show and CPE.

Location. Location. Location. The LAX Hilton is right off the 405 Freeway and other major arteries from North, South, and East, with three convenient parking facilities adjacent to the hotel. The LAX Hilton has a shuttle bus from the LAX airport for attendees flying in for the show.

Attend Free General Sessions each day with CPE. See keynote speakers.

Sponsored by The California CPA Education Foundation and Cal CPA.

Register today and save: flaggmgmt.com/ca

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Publisher,
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Greg LaFollette
CPA, CITP, CGMA,
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Rick Telberg
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Matthew Jagst
Sr Dir of Product Mgmt,
Thomson Reuters



Anthony Hunt
Product Specialist,
Intuit ProConnect Group



Gail Perry
CPA, Editor-in-Chief
CPA Practice Advisor

Show Management:

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2017 California Accounting & Business Conference Program

Register today for the low-cost CPE educational program at \$55/day with 6 CPE credits. \$100 for 2 days with 12 CPE credits. The CPE is accredited by the NASBA. Sponsor Identification number is: 104942.

DAY ONE, Tuesday, June 6

Conference registration and coffee service 7:30-8:20 am 2nd floor Conference Complex - take stairs or elevator to '2'
FREE Keynote Session 1 8:20 - 10:00 am 2nd floor LAX Hilton Conference Session Room. General Session (2 CPE credits)

Technology Futures – 2017

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

Rick Richardson began providing CPAs with his technology futures forecast in 1981 and this year will mark an unbroken string of 37 years of predicting our technology future. Rick will provide attendees with his vision of both the short and longer-term future for technology, including technologies important to the accounting professional. Topics will include a review of prior-year predictions, what major-market companies are doing and how their actions will affect all of us, current trends in hardware, software, and communications as well as emerging technologies that will bring those trends into reality. Rick will conclude with his personal forecasts on our technology future.



Rick Richardson

10:00 am - 4:00 pm **Exhibits open** CPE sessions will have scheduled breaks to see the exhibits in 2 halls: International, Pacific - All on the same floor.
 Exclusive show viewing time 10-11 am.

11:00 am - 2:00- pm Free Exhibits

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

Session 2 11:00 - 11:50 am

Looking into the Crystal Ball: Modern Succession Planning for Your Firm.

Amy Vetter, Global VP Education & Enablement, Head of Acctg, USA, Xero
 Introduced by

Rick Telberg, Pres/CEO, CPA Trendlines

- Trends in today's exit plans
- How to build best-fit successors
- Knowing what buyers want



Amy Vetter



Rick Telberg

- Tips to innovate your service structure
- Scoping future challenges
- Strategies for creating lasting change
- Guidance on letting go

Session 3 11:00 - 11:50 am

Four Things to Know About Perfect Workflow.

Michael Giardina, CEO, OfficeTools

- Find out what ground work is necessary before you implement new workflow systems.
- Discover why investigation of the tools available is necessary to insure successful implementation.
- Learn how to get teams buy in and the continued benefits from a periodic review of a well thought out workflow system.



Michael Giardina

12 noon - 1:20 pm Session 4 **Break in the exhibit hall.** Exclusive show viewing time to see the exhibits in 2 halls: International, Pacific - All on the same floor.

1:20 - 3 pm Session 5 Concurrent with CPE sessions **Free Walking Tour** on the Show Floor, (2 CPE credits) conducted by **Barry Strobel**, Publisher, *CPA Practice Advisor* and **Gail Perry**, CPA, Editor-in-Chief, *CPA Practice Advisor*. Please assemble 10 minutes early.

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

Session 6: 1:20 - 3:00 pm

Inspector Gadget 2017

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

Gizmos and gadgets have become an indispensable part of our digital lives – ever transforming the way we work, play and live. From cloud computing, mobile and hybrid devices to entertainment, home automation and the Internet-of-Things – every aspect of our days are impacted by the latest technology offerings. Join Inspector Gadget as he shares cutting edge tech trends and the hottest gear that every user will want to consider in the months ahead.



David Cieslak

Session 7 1:20 - 3 pm

The CPA Firm of NOW!

Randy Johnston, Chairman & CEO, Network Mgmt Group, Inc., Hutchinson, KS

Forget the "CPA Firm of the Future," it's the "CPA Firm of NOW" that is of immediate concern. What technologies should CPA firms of NOW embrace to improve client satisfaction, attracting and retaining staff, and increasing profitability? Technologies discussed in this session are workflow, practice management, document management, scan-and-populate, engagement planning and management, and tax notice responses. If you work in public accounting, you can't afford to miss this eye-opening session.



Randy Johnston

Session 7A 1:20 - 3 pm

Talk Accounting: How to Reduce Overhead in Your CPA Practice by 90%.

KC Truby, President, TALK Accounting.

Putting talk into your accounting practice.



KC Truby

3:00 - 4:00 pm **Break in the exhibit hall.** Exclusive show viewing time. Show concludes at 4 pm.

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

Session 8: 4:00 - 4:50 pm

Tech That Affects CPA Practices.

Adrian Stern, CPA, CFE, CFF, CrFA, CICA, Clumeck Stern Schenkelberg & Getzoff

- The Cloud - Does it really deliver what it promises?
- Firewall updates - How important are they?
- Wireless access - Are we risking our Client's data?
- Has our phone and pads replaced the desktop computer?



Adrian Stern

Session 9: 4:00 - 4:50 pm

How to Turn Your Goodwill into Cash.

Chris Frederiksen, CPA, CGMA, Frederiksen & Company, Corte Madera, CA

Led by Chris Frederiksen, the "Million Dollar CPA" and leading CPA practice transition advisor in California. Retire gracefully, but get properly paid for what you have accomplished. Multiples and valuation, and what's critical to making a transition successful, including selling, buying or transitioning.



Chris Frederiksen

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

Program and speakers subject to change

DAY TWO, Wednesday, June 7

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

FREE Keynote Session 10 8:20 - 10:00 am 2nd floor LAX Hilton Conference Session Room. General Session (2 CPE credits)
What You Need to Know Now About Tech Trends Impacting the Accounting Profession - Blockchain. Cognitive Computing. Big Data.

Jon Baron, President, Professional, Tax & Accounting, Thomson Reuters

How will these emerging technologies impact on your accounting profession and what you need to know about them now to stay ahead. Jon will discuss the state of the accounting profession, and preview technology trends you can anticipate. What is the pace and type of emerging technologies like Blockchain, cognitive computing and big data. No need to fear new developments. Now you can use them to stay competitive, including data security, identity theft and digital identity technologies.



Jon Baron

10:00 am - 4:00 pm **Exhibits open** CPE sessions will have scheduled breaks to see the exhibits in 2 halls: International, Pacific - All on the same floor. Exclusive show viewing time 10-11 am.

11:00 am - 2:00 pm **Free Exhibits**

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

Step into the Future of Accounting

CeCe Morken, General Manager, Intuit ProConnect Group

Our world is constantly evolving, and so are the tools that we use to live, work and play. We live in a connected world that now leverages data in amazing ways. Smart technology is changing the game and will shape the future of accounting as the world further evolves and builds on the internet of things.



CeCe Morken

10:20-12 noon Session 12 Concurrent with CPE sessions **Free Walking Tour** on the Show Floor, (2 CPE credits) conducted by **Barry Strobel** Publisher, *CPA Practice Advisor* and **Gail Perry**, CPA, Editor-in-Chief, *CPA Practice Advisor*. Plaza Level. Please assemble 10 minutes early.



Barry Strobel



Gail Perry

12 noon - 1:20 pm Session 13 **Break in the exhibit hall.** Exclusive show viewing time to see the exhibits in 2 halls: International and Pacific Ballrooms.

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

Session 14: 1:20 - 3:00 pm

Your Firm's World is Changing

Matthew Jagst, Sr Dir of Product Mgmt, Thomson Reuters

You want your practice to succeed, and balance work success with your personal life. However, your world is changing. Clients now demand real-time information and feedback, placing pressure on limited and busy staff. Firms like yours are using tools and processes that have worked well in the past 20 to 30 years. There is the requirement to hire staff to expand or replace vacancies. Staffing shortages and turnovers are 16.7 to 20.5%, the talent pool is limited. Our goal is how to make your workflow more efficient with tools and technology that will streamline your tax and accounting processing from start to finish. And maybe one day you will sell your firm and retire.



Matthew Jagst

Session 15 1:20 - 3 pm

QuickBooks Online Accountant.

Anthony Hunt, Prod Specialist, Intuit ProConnect Group

An introduction of Intuit and QuickBooks Online. Why small businesses and accounting professionals are moving to online solutions and the benefits of QuickBooks Online. An introduction to QuickBooks Online Accountant, demonstrating special features designed to help accounting professionals support their QuickBooks Online clients and manage their practice in QuickBooks Online Accountant. Finally, it covers the integration between QuickBooks Online and ProConnect Tax Online.



Anthony Hunt

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 2 exhibit halls. Show concludes at 4 pm.

Session 16 4 - 4:50 pm General Session 2nd floor LAX Hilton Conference Session Room. (1 CPE credit)

7 Head Scratcher Questions About Blockchain: What Happens When Tomorrow's Technology Moves Today's Conference Room.

Greg LaFollette, CPA, CITP, CGMA, VP Product Strategy, CPA.com

Blockchain has reached the absolute pinnacle of the "hype cycle" which means you (and your clients) are aware and probably curious. It seems that everyone wants to teach you what blockchain is. This session is NOT that, but rather it's a thoughtful overview of the business model implications for us as practitioners and for our clients. You'll leave with great talking points for your upcoming client meetings.



Greg LaFollette

2017 CPA Practice Advisor's Innovation Awards Reception for Exhibitors

Tuesday, June 6, 5:00 pm Now in their 14th year, *CPA Practice Advisor's* annual Tax & Accounting Technology Innovation Awards have been the pinnacle of recognition for technology vendors serving the tax and accounting profession. Plan to attend this reception and awards event at the close of the show Tuesday.

These awards recognize outside-the-box thinking in product development, breakthrough technologies, state of the art design and implementation, and cutting edge concepts that help accounting professionals and their clients be more productive and profitable.



Network with your accounting and business colleagues at the largest meeting of CPAs in California this year.



Attend the free opening sessions each day, 8:20-10 am with 2 hours of CPE credit.

The accounting marketplace is changing. See new technology, new financial services, new mobile devices, new Cloud, iPad, iPhone, new Apps, and more.

- See new accounting, tax, business and financial systems, including banks, brokerage, insurance.
- See live show demonstrations
- Network with your peers.

Hot new products and services on display at the Free Show.



Partial List of Exhibitors representing accounting and business technology, tax, accounting, finance, business services, iPads, iPhones, new Apps, web services, portals and online systems.

as of 3/29/17

Abacus Data Systems	Certify, Inc.	KBKG Inc.
Accounting Today	CFS Tax Software, Inc.	LegalShield
AccountingSuite	ComplyRight Inc	Mango Voice
AccountingWEB	CorpNet.com	Mitchell & Mitchell Insurance Agency
AccountantsWorld	Corporate Tax Incentives	NCCPAP
AccuPay, Inc.	CPA Charge	NETSPEND
ADP	CPA Practice Advisor	Nolo
AICPA	CPA Site Solutions	OfficeTools
AICPA-PCPS	CPA Trendlines / Bay Street Group	Optima Tax Relief
Allen Corporation Supply, Inc.	CPA.com	Otto Trading
AMG Employee Management	cPaperless / SafeSend	PANALITIX USA Inc.
Aon Affinity	Digital Information Business Solutions	Personable Inc.
Arxis Cloud Solutions	Drake Software	Pransform, Inc.
AutoEntry	eFileCabinet, Inc.	The Progressive Accountant
Avalara	Financial 2nd Opinions	Right Networks
Bank of America	Forrest T Jones	SAFEChecks
BenefitMall	Fujitsu Computer	Spidell Publishing, Inc.
Blackline Partners LLC	Products of America, Inc.	SurePrep, LLC
Bloomberg BNA	GruntWorx	The Tax Adviser
BooXkeeping Corp.	Identillect Technologies	Thomson Reuters
Cal Net	Insightful Accountant	TPS Software Inc.
CalCPA	Interlogic Outsourcing, Inc.	Wells Fargo
CalCPA Education Foundation	Intuit	Wolters Kluwer
California CPA	IVDesk	Xero
CAMICO	IRA Services Trust Company	Zoho
Canopy	Journal of Accountancy	

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The Tax Adviser	Media Sponsor

Free Show, Free CPE Keynotes, Low-cost CPE at \$55/day for 6 CPE Credits

The largest meeting of CPAs in California in 2017.

- Sponsored by the CalCPA Education Foundation
- Free opening sessions each day, 8:20-10 am with 2 hours of free CPE.
- Convenient parking – 3 locations.
- Accounting in the digital world, e-finance, e-business, Cloud, security, tax, iPads, iPhones, payrolls, tax, social media.



HOTEL RESERVATIONS

Register at the beautiful and convenient **LAX Hilton Hotel (Code: CABS)**, at the special low rate of \$159 plus tax single/double. 5711 West Century Blvd, right off the #405 San Diego Freeway and right at the LAX Airport. The LAX Hilton is the head quarters hotel for the Show and Conference. All hospitality and network functions are at the 1200 room hotel. Special rate of \$159 plus tax for the period of Sunday-Thursday, June 4-8.

The **LAX Hilton** has moderate priced parking for 400 cars at \$20 per day self parking, \$30 per day valet parking for hotel guests. The hotel has a shuttle bus that serves all the airlines in the LAX Airport.

Phone for reservations by calling **LAX Hilton** at: 310-410-4000. Ask for code: 'CABS' Make your hotel reservations to insure that you will receive the special low rate. **Deadline May 19.**

CONVENIENT PARKING

LAX HILTON HOTEL (310) 410-4000
\$20.00/Day Self-Parking \$30.00/Day Valet
Maximum rate for underground entrance on west side of hotel parking for approx 400. No in-and-out unless registered at the hotel. **You must come early to park at the Hotel.**

THE PARKING SPOT (310) 642-0947
next to the Hilton on Century Blvd.
\$20.95/Day Self-Parking \$21.95/Day Valet parking
\$16.95/day roof parking
Enclosed parking 6'6" clearance (Valet parking only).

WALLY PARK (310) 337-1944
Bellanca off Century Blvd. 1 block from Hilton
\$20.95/Day Self-Parking \$22.95/Day Valet
\$16.95/Day Roof Parking
Enclosed and open-air parking.

Free Walking Tour on the Show Floor with Free CPE, brought to you by *CPA Practice Advisor*, conducted by **Barry Strobel** and **Gail Perry**.

CPE Walking Tour – 2017 Edition.

Session 5: Tuesday, June 6 – 1:20–3 pm

Session 12: Wednesday, June 7 – 10:20 am–12 Noon

Must assemble 10 min. prior to Walking Tour start.

Barry Strobel, Publisher,
CPA Practice Advisor
and
Gail Perry, CPA,
Editor-in-Chief,
CPA Practice Advisor



Barry Strobel



Gail Perry

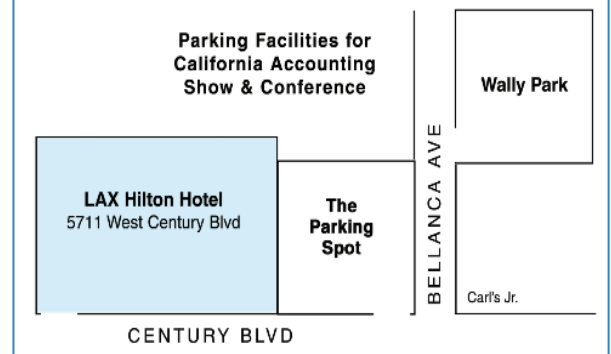
CPE INFORMATION

Method of Presentation	Lecture, Q&A
Delivery Method	Group - Live
Level of Knowledge	Basic
Recommended CPE Credit	50 min sessions=1 CPE 100-min sessions= 2 CPE
Prerequisite	None
Advance Preparation	None
Credit hours of 50-minutes for 1 CPE credit, 100 minutes for 2 CPE credits are recommended in accordance with the State-ment on Standard for Continuing Professional Education (CPE) Programs published by the NASBA. Sponsor Identification # 104942	



Flagg Management Inc is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. For more information regarding administrative policies such as complaint and refund, please contact Flagg Management at 212-286-0333 or online at flaggmgmt@msn.com.

Parking Facilities for California Accounting Show & Conference



Register today online at: flaggmgmt.com/ca

Sponsored by:



CONFERENCE - CPE SESSIONS

3 Ways to Register:

ONLINE flaggmt.com/ca
 save time and register online

FAX: 212-286-0086

MAIL: Flagg Management
 353 Lexington Ave
 New York, NY10016

CONFERENCE Tues, June 6 8:20 - 4:50 pm
 Weds, June 7 8:20 - 4:50 pm

FREE EXHIBITS Tues, June 6 10 - 4 pm
 Weds, June 7 10 - 4 pm

CPE SESSIONS One Day fee \$55 in advance, \$65 after May 19
 Two Day fee \$100 in advance, \$110 after May 19

Check sessions you wish to attend:

Day One, Tuesday, June 6

(\$55 in advance, \$65 after May 19)
 8:20-10 am (2 FREE CPE credits)
 Session 1: Technology Futures. Rick Richardson
 11-11:50 am (1 CPE credit)
 Session 2: Modern Succession Planning for Your Firm. Amy Vetter
 Session 3: Four Things about Perfect Workflow> Michael Giardina
 1:20-3 pm Concurrent Sessions. Choose one. (2 CPE credits)
 Session 5: Walking Tour of Show. Barry Strobel/Gail Perry
 Session 6 Inspector Gadget. David Cieslak
 Session 7: The CPA Firm of NOW. Randy Johnston
 Session 7a: TALK Accounting. KC Truby
 4 -4:50 pm Concurrent Sessions. Choose one. (1 CPE credit)
 Session 8: Tech That Affects CPA Pratices. Adrian Stern
 Session 9: How to Turn Your Goodwill into Cash. Chris Frederiksen

Day Two, Wednesday, June 7

(\$55 in advance, \$65 after May 19)
 8:20-10 am (2 FREE CPE credits)
 Session 10: Tech Trends Impacting Accounting Profession. Jon Baron
 11-11:50 am (1 FREE CPE credit)
 Session 11: The Future of Accounting. CeCe Morken
 10:20-12 noon (2 CPE credits)
 Session 12: Walking Tour of Show. Barry Strobel/Gail Perry
 1:20-3 pm Concurrent Sessions. Choose one. (2 CPE credits)
 Session 14: Your Firm's World is Changing. Matthew Jagst
 Session 15: QuickBooks Online Accountant. Anthony Hunt
 4-4:50 pm (1 CPE credit)
 Session 16: Blockchain- Tomorrow's Technology Today. Greg LaFollette

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CPE - CONFERENCE & FREE SHOW REGISTRATION

Please Print. Multiple requests on duplicates of this form.
Online or Fax. Deadline May 19. Confirmation will be sent beginning May 4.
 Sessions available on first-come, first-served basis. Act today.

Register here or Online at: www.flaggmt.com/ca
 Fax: 212-286-0086

- Free Show Only
 Register for paid CPE Conference Interested in exhibiting

Name _____ CPA?

Title _____

Company _____

Street _____

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Phone(_____) _____ Fax(_____) _____

Email _____

Signature _____

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- Check payable to Flagg Management Inc
 AMEX Visa MasterCard

Total : \$ _____

Card no _____

Signature _____ Exp date ____/____/____

CPE REGISTRATION

Choose sessions from column at left.

I wish to attend the paid CPE Sessions:
 Indicate Sessions you wish to attend. No cancellations after May 19.
 Substitutions permitted with written notification.

- Full Day, Tues, June 6 (\$55. in advance. \$65. after May 19)
 Full Day, Weds, June 7 (\$55. in advance. \$65. after May 19)
 2 Full Days, June 6 - 7 (\$100. in advance. \$110. after May 19)