

# 2010 Accounting Technology New York Show & CPE Conference

May 5-6, Weds-Thurs Penn Plaza Pavilion, Pennsylvania Hotel, NYC

7th Avenue and 33rd Street, right across from Penn Station and Madison Square Garden

**A Free Show for New York Accounting Professionals in the Heart of New York.  
Free CPE Keynotes Each Morning from 8 – 9:40 am with Two CPE Credits.  
Free Accounting Show Featuring Major National Accounting Vendors.**

**Register: [www.flaggmgmt.com/ny](http://www.flaggmgmt.com/ny)**



**The CPE educational sessions are low-cost at \$40 per day** with 5 CPE credits, or \$70 for two days with 10 CPE credits. The CPE is accredited by the New York State Education Department, Albany.

**The two-day show** will focus on new computer-savvy accounting systems and software to save money and time for your accounting practice and your clients.

**Reasons to Attend:**

- **See the major national accounting vendors** at one time and one place in New York in 2010.
- **Network with your peers** at the most convenient meeting place in New York, right across the street from Penn Station and Madison Square Garden.

**Get a jump start on your computer needs** for 2010. What

systems to buy. What systems to keep. What software to save you money and time.



**Free Show:**

Weds, May 5 10 – 4 pm  
Thurs, May 6 10 – 4 pm

**CPE Conference:**

Weds, May 5 8 – 4:50 pm  
Thurs, May 6 8 – 4:50 pm

Register Today for the FREE Show and Low Cost CPE at only \$40/day for 5 CPE credits.

**2 Free CPE credits  
Day One, 8 am**



**Rick Richardson**  
CPA, CITP, Richardson Media & Technologies, Canton, CT

**What's New in Accounting Technology.** New Hand-Held Phones and Devices Straight from the Consumer Electronics Show  
• New Time-Saving, Money-Saving Ideas to Use Right Now • Predictions from Last Year • Predictions for this Year.

Rick is Your Source to Keep Up-to-Date.

**2 Free CPE credits  
Day Two, 8 am**



**Erik Asgeirsson**  
President & Chief Executive Officer, CPA2Biz Inc New York, NY

**What's New and Working in the Accounting Profession This Year.** Working on the Road • Connecting to your Clients Remotely • Portals and Online Software • Cloud • Cost-Savings and Time-Saving Strategies.

Get the Inside Story from a Leader in the Field.

**Free Show. Free CPE Keynotes. Low-Cost CPE at \$40. per Day.**

2010 Sponsors



For complete details and to register online-

Visit: [flaggmgmt.com/ny](http://flaggmgmt.com/ny)

For more information:

Flagg Management Inc  
353 Lexington Ave, NY, NY 10016  
212-286-0333 Fax: 212-286-0086  
flaggmgmt@msn.com

# 2010 Accounting Technology New York CONFERENCE PROGRAM

## DAY ONE, WEDNESDAY, May 5

**Conference registration and free coffee service** 7:30 - 8 am 18th floor Conference Ballrooms, Hotel Pennsylvania, connected to Penn Plaza Pavilion, on the 1st and 2nd floors by elevators that connect to the 18th floor Conference

Session 1 8 - 9:40 am 18th floor, Hotel Pennsylvania, Conference Session Room. General Session (2 CPE Credits)

**What's New in Accounting Technology. Hot new accounting and business systems. A look at hand-held computers, cell phones, PDAs, iPads, Blackberries. Predictions for the year. New accounting and business technology to save time and money for you and your clients.**

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

His session will cover new hand-held phones and devices straight from the Consumer Electronics Show. New time-saving, money-saving ideas to use right now. Predictions from last year. Predictions for this year. Rick is your Search Engine to the future.



Dana 'Rick' Richardson

10:00 am - 4:00 pm **Exhibits open** Penn Plaza Pavilion, on the 1st and 2nd floors. Exclusive show viewing time 10-11 am. Take elevator from 18th fl, Hotel Pennsylvania to the Penn Plaza Pavilion. Special elevator will operate for the show period. Free coffee service in the Exhibit Hall.

**Concurrent Sessions** (select one of two) 18th floor, Hotel Pennsylvania, Conference Session Room (1 CPE credit)

Session 2 11 - 11:50 am

**Recent Trends in Accounting Firm Technology.**

**James C. Bourke**, CPA, CITP, Partner, WithumSmith+Brown, PC, Red Bank, NJ

Jim Bourke is the past president of the New Jersey Society of CPAs and is a frequent contributor of accounting firm technology issues for accounting publications. Jim speaks at many accounting and business conferences and seminars throughout the country. Jim will cover accounting technology in small and mid-sized firms to increase productivity in the accounting profession.



James C. Bourke

Session 3 11 - 11:50 am

**How to Get More Business: Putting the Internet and your website to work to reach new clients and prospects.**

**Gail A. Perry**, CPA, Author, AccountingWEB Managing Editor

Learn how to increase your business using the Internet and the web. Increase your online presence and learn how to attract new clients. Reinforce your relationship with existing clients and improve your credibility by increasing your online presence. Put the Internet to work in your accounting firm.



Gail A. Perry

12 noon - 1:20 pm Session 4 **Break in the exhibit hall to see the exhibits.** Penn Plaza Pavilion on the 1st and 2nd floors by elevators that connect to the 18th floor Conference. Exclusive show viewing time.

**Concurrent Sessions** (select one of two) 18th floor, Hotel Pennsylvania, Conference Session Room (2 CPE credits)

Session 5 1:20 - 3 pm

**Common QuickBooks mistakes clients make and how to fix them.**

**Eileen Dunn**, CPA, President, Itsa Solution, Inc., Islandia, NY

Eileen Dunn founded Eileen Dunn CPA, PC, a New York CPA firm and has provided a fresh and innovative approach to accounting issues. She has served medical and legal professionals, construction contractors, automotive service shops, restaurants, retail stores and the manufacturing industry. She is a faculty member of Intuit Academy Trainer Network and she will cover common QuickBooks mistakes clients make and how to fix them.



Eileen Dunn

Session 6 1:20 - 3 pm

**Cloud Computing - How to Take Advantage of Software Leasing Now**

**Matt Jagst**, Product Manager, Thomson Reuters, Dexter, MI

Why Cloud Computing/SaaS is so relevant today, and how it can benefit your firm. Advantages and potential pitfalls of adopting a Software as a Service model in your firm. What your firm needs to consider before moving to a cloud computing environment. Insights from Thomson Reuters' more than 10 years experience in delivering software in a hosted environment.



Matt Jagst

3:00 - 4:00 pm **Break in the exhibit hall to see the exhibits.** Penn Plaza Pavilion on the 1st and 2nd floors by elevators that connect to the 18th floor Conference. Exclusive show viewing time.

**Concurrent Sessions** (select one of two) 18th floor, Hotel Pennsylvania, Conference Session Room (1 CPE credit)

Session 7 4 - 4:50 pm

**Putting Android, Google OS, Net Books and iPads to Work in Your Practice.**

**Gregory L. LaFollette**, CPA, CITP, Senior Manager, Tax & Technology Consulting, Eide Bailly, Sioux Falls, SD

Accounting and tax professionals face a rapidly changing world with Apples iPhone and iPad app stores everywhere, Android, Google OS, net books, etc. As software morphs to the cloud and workstations become laptops, net books become smart phones, we're faced with convergence gone wild! Don't worry. We've been there before. Greg will review the history, the current environment and, most important, the short and long-term effects of this latest technology shift.



Greg LaFollette

Session 8 4 - 4:50 pm

**Security for Your Computers and Your Back Up. How to protect your business and your clients data. What systems to buy and install.**

**Armando D'Accordo**, President, CMIT Solutions of South Nassau, Merrick, NY

Security for your computer and data back-up in the event of fire, flood, theft, or total systems failure. How to back-up your data. Protecting your business and your client's data. What systems to buy and install for your business and your client's business.



Armando D'Accordo

Show concludes at 4 pm. CPE program concludes at 4:50 pm. Speakers and Program subject to change.

Register online at: [flagmgmt.com/ny](http://flagmgmt.com/ny).  
A full day of CPE at only \$40/day.  
Two full days of CPE at only \$70.  
Save time. Save money. Register today.

## DAY TWO, THURSDAY, May 6

**Conference registration and free coffee service** 7:30 - 8 am 18th floor Conference Ballrooms, Hotel Pennsylvania, connected to Penn Plaza Pavilion, on the 1st and 2nd floors by elevators that connect to the 18th floor Conference

Session 10 8 - 9:40 am 18th floor, Hotel Pennsylvania, Conference Session Room. General Session (2 CPE Credits)

### **What's New and Working in the Accounting Profession This Year.**

**Erik Asgeirsson**, President and CEO, CPA2Biz, Inc., New York, NY

Are you working on the road? Connecting to your clients remotely? Using portals and online software? Cloud Computing? Find out about these cost-savings and time-saving strategies. Get the inside story from a leader in the field.



*Erik Asgeirsson*

10:00 am - 4:00 pm **Exhibits open** Penn Plaza Pavilion, on the 1st and 2nd floors. Exclusive show viewing time 10-11 am. Take elevator from 18th fl, Hotel Pennsylvania to the Penn Plaza Pavilion. Special elevator will operate for the show period. Free coffee service in the Exhibit Hall.

**Concurrent Sessions** (select one of two) 18th floor, Hotel Pennsylvania, Conference Session Room (1 CPE credit)

Session 11 11- 11:50 am

### **Cloud Computing and Putting Portals to Work in Your Accounting Practice.**

**Dr. Chandra Bhansali**, President, AccountantsWorld, Hauppauge, NY

Cloud Computing gives accountants tremendous opportunities to increase productivity and reach new clients, especially for small businesses. Putting Cloud Computing to work in small and mid-size practices. Becoming business-to-business advisers for your clients. An explanation of Cloud Computing and how it can work to increase business in your firm.



*Dr. Chandra Bhansali*

Session 12 11- 11:50 am

### **Gadgets & Gizmos – What's Useful and Fun for Accounting Professionals: What's new at the 2010 Consumer Electronics Show.**

**Gregory L. LaFollette**, CPA, CITP, Senior Manager, Tax & Technology Consulting, Eide Bailly, Sioux Falls, SD

Greg has returned from his annual trek to the Consumer Electronics Show in Las Vegas, the gadget mother ship. Greg will share the best of the tens of thousands of products on display there. The session will feature current off-the-shelf products useful for tax and accounting practitioners. See what's new, what's useful, what's fun and what's affordable.



*Greg LaFollette*

12 noon - 1:20 pm Session 13 **Break in the exhibit hall to see the exhibits.** Penn Plaza Pavilion on the 1st and 2nd floors by elevators that connect to the 18th floor Conference. Exclusive show viewing time.

**Concurrent Sessions** (select one of two) 18th floor, Hotel Pennsylvania, Conference Session Room (2 CPE Credits)

Session 14 1:20 - 3 pm

### **Roth IRA Conversion Extension: Switch now, pay tax later.**

**Stephen Bigge**, CPA, Tax Manager, Baker Tilly Virchow Krause, LLP, Appleton, WI

The world of Roth conversions has changed. Virtually every accountant has an opportunity to sell this service to their client base. Many variables go into the equation of converting Roth IRAs. The rules for the conversion have changed. Your clients can spread the taxable income generated over the following two years. A case study will show what amounts to convert and over what period using CCH software tools.



*Stephen Bigge*

Session 15 1:20 - 3 pm

### **New Accounting Solutions for Small Business: Peachtree Quantum 2011 - The High Performance Peachtree Accounting Solution for Small Business.**

**Mike Savory**, Senior Product Manager, Sage Peachtree Accounting

Learn about Sage Peachtree Quantum 2011, the High Performance Peachtree Accounting Solution and the most significant release in Peachtree's 30-year history. If you haven't taken a look at Peachtree in a while, come find out why it is easier to use now than ever before. Mike Savory will demonstrate and tell about this Sage Peachtree Accounting product line.



*Mike Savory*

3:00 - 4:00 pm **Break in the exhibit hall to see the exhibits.** Penn Plaza Pavilion on the 1st and 2nd floors by elevators that connect to the 18th floor Conference. Exclusive show viewing time.

Session 16 4 - 4:50 pm General Session: final session of the day (1 CPE Credit)

### **Sell Your Business. Find a Partner. Grow Your Business.**

**Max T. Krotman**, J.D., Managing Partner, Globalforce International Inc., Melville, NY

If 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.



*Max T. Krotman*

CPE program concludes at 5 pm. Show concludes at 4 pm. Speakers and Program subject to change.

Make sure you see the exhibits in the Penn Plaza Pavilion. There will be ample opportunity to attend the free CPE general sessions each morning from 8 to 9:40 am, and then visit the exhibits thereafter.

Visit our website and shop the show in advance at: [flagmgmt.com/ny](http://flagmgmt.com/ny)

Accountants Media Group  
 AccountantsWorld  
 Accounting Transition Advisors  
 AccountingWEB, Inc.  
 AICPA  
 Becker Professional Education  
 Bisk Education, Inc.  
 Binding Systems of America  
 BNA Tax & Accounting  
 Cartridge World  
 CCH, a Wolters Kluwer business  
 CFS Tax Software, Inc.  
 CMIT Solutions  
 CPA Magazine  
 The CPA Technology Advisor  
 CPA2Biz, Inc.  
 CPAASP.com  
 Drake Software  
 Emochila, Inc.  
 Fidelity Investments  
 Gleim Publications  
 Globalforce International Inc.  
 HBA Ltd.  
 IDMS – Account Ability

Intuit  
 Journal of Accountancy  
 KK Mehta CPA PC  
 Madison Insurance Corp.  
 The Mines Press, Inc.  
 Monroe Systems for Business  
 Office Tools Professional  
 Paychex, Inc.  
 PenSoft  
 The Progressive Accountant  
 Queue Associates  
 RDA Enterprises Inc.  
 Sage Software  
 ShareFile for Accountants  
 SurePayroll  
 The Tax Adviser  
 Tax Materials Inc.  
 TaxWorks Div. of RedGear Technologies  
 Thomson Reuters  
 Thomson Reuters myPay  
 Thomson Reuters  
 Tax & Accounting  
 WizSoft, Inc.

### Sponsors

CCH, a Wolters Kluwer business  
 Intuit  
 Sage Software  
 Thomson Reuters Tax & Accounting

### Media Sponsors

Accountants Media Group – SourceMedia  
 AccountingWEB, Inc.  
 CPA Magazine  
 The CPA Technology Advisor  
 Journal of Accountancy  
 The Progressive Accountant  
 The Tax Adviser



### The show to see, examine and compare, accounting, business and financial products and services.

- See what's new with traditional accounting software, hardware and reference systems for practice and client operations.
- See what's new with Internet, Web services, and online systems for accountants and their clients.
- See new technology for small and mid-sized businesses.
- Meet leading financial service providers, including brokerage, banks and insurance services.
- Network with your peers.

### HOTEL RESERVATIONS

**Hotel Pennsylvania's PENN 5000**, Penn Station at 7th Avenue and 32nd Street  
 212-736-5000 ext 8460 (toll free at 800-223-8585).

Ask for **"Accounting Technology New York 2010"** for the period of Mon, May 3 through Thurs, May 6, room rate \$199 single/double plus tax (one bed), \$219 single/double plus tax (two beds). Special check in area, left side of Lobby. Continental breakfast included with both \$199 and \$219.

This historic yet trendy hotel is in an excellent Midtown location directly opposite Madison Square Garden and Amtrak's Penn Station. Hotel Pennsylvania is within walking distance of the business, entertainment and fashion districts, including Macy's, the Empire State Building, and Times Square.



# 2010 Accounting Technology New York

May 5-6, Wed-Thu Penn Plaza Pavilion

See 2009 Photo Report of this Annual Accounting Show and CPE Conference program.



The Hotel Pennsylvania Penntop Ballroom, 18th floor, was the setting for the CPE conference program in 2009. This will be the same location for the CPE conference program in 2010, May 5-6.



Accounting professionals attended the show from Greater New York locations representing accounting firms and accounting professionals in business and industry throughout the Metropolitan area.



An all-star program included Rick Richardson, CPA, CITP, a nationally recognized speaker. Rick covered handheld computers, cell phones, PDAs and hot new products from the Consumer Electronics Show. Rick will return May 5, 2010 with his predictions for the future and a report on his predictions from 2009.



Attendees reported a lively show with national exhibitors demonstrating their accounting and business systems. These exhibitors will return in 2010 with their new 2010 systems.



The exhibits showed more than savvy technology products. Payroll, banking and financial systems were exhibited at this accounting and business supermarket.



The show floor was an opportunity for viewing new products and services. The exhibits were free to accounting professionals. The exhibits will be expanded in 2010 by popular demand of exhibitors.

# 2010 Accounting Technology New York

May 5-6, Wed-Thu Penn Plaza Pavilion

Flagg Management Inc  
353 Lexington Avenue  
New York, NY 10016  
Phone (212) 286-0333  
FAX: (212) 286-0086

Prsrt Std  
US Postage Paid  
Clifton, NJ  
Permit no 1104

## CONFERENCE REGISTRATION

### 3 Ways to Register

#### ONLINE

flaggmgt.com/ny  
save time and register online

#### FAX:

212-286-0086

#### MAIL:

Flagg Management  
353 Lexington Ave  
New York, NY10016

#### CONFERENCE

Wednesday, May 5  
Thursday, May 6

8 - 4:50 pm  
8 - 4:50 pm

#### FREE EXHIBITS

Wednesday, May 5  
Thursday, May 6

10 - 4 pm  
10 - 4 pm

#### CPE SESSIONS

One Day fee \$40, in advance \$50 after Apr 27  
Two Day fee \$70 in advance, \$100 after Apr 27

#### Day One, Wednesday, May 5 (\$40 in advance, \$50 after Apr 27)

8 - 9:40 am (2 CPE credits)

- Session 1: Rick Richardson, What's New in Accounting Technology.

11 - 11:50 am Concurrent Sessions. Choose one. (1 CPE credit)

- Session 2: Recent Trends in Accounting Firm Technology.  
 Session 3: How to Get More Business on the Internet

1:20 - 3 pm Concurrent Sessions. Choose one. (2 CPE credits)

- Session 5: Common QuickBooks mistakes clients make  
 Session 6: Cloud Computing

4 - 4:50 pm Concurrent Sessions. Choose one. (1 CPE credit)

- Session 7: Working with Android, Google OS, Net Books and iPads.  
 Session 8: Security for Your Computers and Your Back Up

#### Day Two, Thursday, May 6 (\$40 in advance, \$50 after Apr 27)

8 - 9:40 am (2 CPE credits)

- Session 10: What's New and Working in Accounting

11 - 11:50 am Concurrent Sessions. Choose one. (1 CPE credit)

- Session 11: Cloud Computing and Portals  
 Session 12: New Gadgets & Gizmos for Accounting Professionals

1:20 - 3 pm Concurrent Sessions. Choose one. (2 CPE credits)

- Session 14: Roth IRA Conversion Extension  
 Session 15: New Solutions for Small Business: Peachtree Quantum 2011

4 - 4:50 pm General Session. (1 CPE credit)

- Session 16: Sell Your Business. Find a Partner. Grow Your Business.

Must indicate Sessions you wish to attend.

No cancellations after Apr 27. Substitutions permitted with written notification.

## HOTEL RESERVATIONS

### Special Room Block for the 2010 Show, May 3-6

Hotel Pennsylvania's PENN 5000, Penn Station at 7th Avenue and 32nd Street, 212-736-5000 ext 8460 (toll free at 800-223-8585).

Ask for "Accounting Technology New York 2010" for the period of Mon, May 3 through Thurs, May 6, room rate \$199 single/double plus tax (one bed), \$219 single/double plus tax (two beds). Special check in area, left side of Lobby. Continental breakfast included with both \$199 and \$219.

#### Who Should Attend

- New York State accountants in public practice
- accountants in industry
- Tax preparers and financial advisors
- Clients and accounting professionals
- Small business owners and users of accounting systems
- Corporate executives who manage accounting enterprise financial systems

## FREE SHOW BADGE REGISTRATION

Please Print. Multiple requests on duplicates of this form.  
Online or Fax. Deadline Apr 27. Confirmation will be sent beginning April 1.  
Sessions available on first-come, first-served basis. Act today.

#### Register for free show

Free Show Only.

Interested in exhibiting

Name \_\_\_\_\_  CPA?

Title \_\_\_\_\_

Company \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone(\_\_\_\_) \_\_\_\_\_ FAX:(\_\_\_\_) \_\_\_\_\_

Email \_\_\_\_\_

I. D. Number \_\_\_\_\_

Signature \_\_\_\_\_

## CPE REGISTRATION

#### Choose sessions from column at left.

I wish to attend the paid CPE Sessions:

- Full Day, Wed May 5 (\$40. in advance. \$50. after Apr 27).  
 Full Day, Thur May 6 (\$40. in advance. \$50. after Apr 27).  
 Two Full Days, May 5-6 (\$70. in advance. \$100. after Apr 27).

#### Method of Payment

Check payable to Flagg Management Inc

AMEX  Visa  MasterCard

Card no \_\_\_\_\_

Signature \_\_\_\_\_ Exp date \_\_\_\_/\_\_\_\_

Total : \$ \_\_\_\_\_