

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.