

21st Annual

# 2015 New Jersey Accounting, Business & Technology Show

May 13-14, 2015 Weds-Thurs

Meadowlands Exposition Center

355 Plaza Drive, Secaucus, NJ at Harmon Meadows  
Adjacent to the NJ Turnpike and Route 3 and major NJ roadways

ALL NEW  
Register Today  
for the FREE Show and  
Low Cost CPE at only \$45/day

Sponsored by NCCPAP,  
National Conference  
of CPA Practitioners.



## All New CPE Program and Free Show for New Jersey CPAs and Accounting Professionals. See checklist below.

- ✓ Managing Accounting Technology: iPads, iPhones, Cloud, Mobile, Web, Serving Clients better.
- ✓ CPE sessions at low cost of \$45 per day with 6 hours of CPE credits, or \$80 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, web. Network with friends. Efficient two day conference and free show.
- ✓ Location. Location. Location. The Meadowlands is convenient to the New Jersey Turnpike and Route 3, and major arteries in North Jersey.
- ✓ Free parking, low-cost luncheon. You don't have to leave the convention center to have lunch.
- ✓ Free CPE keynotes each morning from 8-9:40 am with 2 Free CPE credits.
- ✓ QuickBooks Academy sponsored by Intuit - a new program for 2015.
- ✓ Sponsored by NCCPAP, National Conference of CPA Practitioners.
- ✓ For complete details and to register online: visit: [flaggmgmt.com/nj](http://flaggmgmt.com/nj)

2015 Sponsors



### KEYNOTE



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

### KEYNOTE



**Erik Asgeirsson**  
President & CEO,  
CPA.com

### KEYNOTE



**Joel L. Naroff, PhD**  
Naroff Economic  
Advisors



**Doug Sleeter**  
President,  
The Sleeter Group



**MB Raimondi**  
CPA, CITP, MS Taxation,  
Intuit Solution Provider



**James C. Bourke**  
CPA, CITP, CFF, CGMA,  
Partner,  
WithumSmith+Brown, PC



**Samantha Mansfield**  
Sr Mgr Corp Communi-  
cations and Program  
Devel, CPA.com



**Robert L. Goldfarb**  
CPA, Princ, Janover LLC  
Chmn, LI Tax Profs  
Symposium, NCCPAP



**Brian Siet**  
CPA, Sr Mgr, Strategic  
Relships Tax & Acctg US  
Wolters Kluwer



**Daniel Hood**  
Editor-in-Chief,  
Accounting Today



**Sandra Johnson**  
CPA, Owner,  
Sandra Johnson, CPA PC



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



**Alan J. Preis, CPA,**  
Alan J. Preis, CPA, PC



**Laurie Rodriguez**  
Sr Product Manager,  
Sage



**Gary Olynik**  
Sage Accountant Network  
acct advocate, Sage

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

# 2015 New Jersey Accounting, Business & Technology Show Conference Program

## DAY ONE, WEDNESDAY, May 13

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 National Association of State Boards of Accountancy (NASBA).

**Conference registration and free coffee service : 7:30-8:00 am** Meadowlands Exposition Center, Secacus, NJ. Come early for free coffee.

Session 1 8 - 9:40 am, Conference Session Room. (2 CPE Credits) **KEYNOTE SESSION**

### Technology Futures 2015 – iPads, iPhones, Cloud, Mobile, Web. Predictions for 2015. Keep up with technology. Find out what's new, what's hot, what's working.

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

Rick Richardson surveys the accounting, business, and finance technology for you. Rick will forecast technology, trends and futures for your clients, your business and personal life in a live session. Rick does the research so you don't have to. He's a CPA and he knows what you need for your business and your clients' business. Plan to attend.



Dana 'Rick' Richardson

**Exhibits open** 9:40 – 3:30 pm Exclusive show viewing time 9:40-11 am. Free coffee service in the Exhibit Hall.

**Concurrent Sessions** (select one of two) Conference Session Room (1 CPE credit)

Session 2 11–11:50 am

### What is YOUR Value.

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

All business success is founded in one single word. Value. Today, technology is driving incredible new opportunities for accountants to pivot to new business models, and deliver services small businesses want. No matter what model you choose, your main focus should be on creating and enhancing value. Everyone must create value, and your focus must always be on creating value for your clients, your firm, and ultimately, yourself.



Doug Sleeter

Session 3 11–11:50 am

### Show Me the Money. Improving Your Firm's Cash Flow.

**Sandra Johnson**, CPA, Owner, Sandra Johnson, CPA PC

Introduced by:

**Robert L. Goldfarb**, CPA, Principal, Janover LLC, Chairman, Long Island Tax Professionals Symposium, NCCPAP

Cash flow is the lifeline of every business, yet many small firm practitioners don't know if they are charging competitive fees. This session will discuss how to determine fees, billing dos and don'ts, common billing myths, collection procedures, and more.



Sandra Johnson



Robert L. Goldfarb

Session 4 12 noon – 1:20 pm **Exclusive Show viewing time in the exhibits.** Low-cost lunch - You don't have to leave the convention center. See examine and compare accounting, business, finance and services at one time and one place in New Jersey.

**Concurrent Sessions** (select one of two) Conference Session Room (2 CPE credits)

Session 5 1:20 - 3:00 pm

### New: QuickBooks Academy - QuickBooks Best Practices: Transitioning to an Online Practice.

**MB Raimondi**, CPA, CITP, MS Taxation, Advanced QuickBooks Certified ProAdvisor and Intuit Solution Provider, Trumbull, CT

Introduced by: **Gail Perry**, Editor-in-Chief, You will learn best practices for using QuickBooks to convert to an online practice. MB Raimondi will help you understand which clients are best suited for transitioning to the cloud and walk you through the process of converting desktop files to QuickBooks Online.



MB Raimondi



Gail Perry

Session 6 1:20 - 3:00 pm

### Winning the Competitive Landscape Today and Tomorrow: Insights to Maximizing Growth.

**Brian Siet**, CPA, Senior Manager, Strategic Relationships Tax & Accounting US, Wolters Kluwer

Putting cloud and accounting and business software to work to provide competitive services for your clients and business partners.



Brian Siet

3:00 - 3:30 pm **Exclusive Show viewing time in the exhibits.** See examine and compare accounting, business, finance and services at one time and one place in New Jersey.

Session 7 3:30 - 4:20 pm Conference Session Room (1 CPE credit) **KEYNOTE SESSION**

### Where is the Economy Headed?

**Joel L. Naroff**, Ph.D., Naroff Economic Advisors

Hear from a nationally acclaimed economic on the state of the economy – both locally and nationally. He'll share his take on Janet Yellen, Fed Chair, and the future Fed interest rate hike, Europe's Euro drop, and what U.S. export markets face with a strong dollar. He'll look at the future and how it will affect you and your clients



Joel L. Naroff

Show concludes at 3:30 pm. CPE program concludes at 4:20 pm. Speakers and Program subject to change.



# DAY TWO, THURSDAY, May 14

**Meadowlands Exposition Center**

355 Plaza Drive, Secaucus, NJ at Harmon Meadows

**Conference registration and free coffee service : 7:30-8:00 am** Meadowlands Exposition Center

Come early for free coffee..

Session 10 8 - 9:40 am Conference Session Room. (2 CPE Credits) **KEYNOTE SESSION**

## **CPA Technology in the Cloud.**

**Erik Asgeirsson**, President and CEO, CPA.com, New York, NY

Cloud computing has matured in acceptance and application by CPAs and the accounting profession. Data shows that practitioners are working with Cloud and employing it in their practice and their clients' operations. Erik Asgeirsson, President, CEO, CPA.com will discuss these trends and the impact they have on your firm and your clients' operations.



Erik Asgeirsson

**Exhibits open** 9:40 am - 3:30 pm . Exclusive show viewing time 9:40-11 am. **Free coffee service in the Exhibit Hall.**

**Concurrent Sessions** (select one of two) Conference Session Room (1 CPE Credit)

Session 11 11:00 - 11:50 am

## **Cyber Threats and Why you Definitely Need to Take Notice.**

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

Introduced by: **Daniel Hood**, Editor-in-Chief, *Accounting Today*, New York, NY

Not a day goes by where we don't hear about another security breach or data compromise. The problem is that we only hear about the high profile cases involving millions of records that have been compromised. Jim will share some stories about recent data breaches and discuss some best practices. Jim Bourke is a nationally recognized speaker and is the past president of the New Jersey Society of CPAs and was recently named one of the 100 top accounting professionals in *Accounting Today*.



James C. Bourke



Daniel Hood

Session 12 11:00 - 11:50 am  
**New Jersey Tax Update.**

**Alan J. Preis**, CPA, Alan J. Preis, CPA, PC

Get up to speed on current events, New Jersey tax and legislative matters, court cases and other hot topics. Explore relevant state tax issues, including GIT changes permitting limited netting and the prospects for further changes under the Christie administration.



Alan J. Preis, CPA

Session 13 12 noon – 1:20 pm **Exclusive Show viewing time in the exhibits.**

Low-cost lunch - You don't have to leave the convention center. See examine and compare accounting, business, finance and services at one time and one place in New Jersey.

**Concurrent Sessions** (select one of two) Conference Session Room (2 CPE Credits)

Session 14 1:20 - 3:00 pm

## **New: QuickBooks Academy - Common Workflows in QuickBooks Online**

**MB Raimondi**, CPA,CITP, MS Taxation, Advanced QuickBooks Certified ProAdvisor and Intuit Solution Provider, Trumbull, CT

Learn common workflows using QuickBooks Online. Find different ways of entering transactions including utilizing the banking center to assist with entering transactions. Take advantage of the Accountant Toolbox to help manage all of your small business clients using QuickBooks Online.



MB Raimondi

Session 15 1:20 - 3:00 pm

## **A Tactical Approach to Technology-based Advisory Services. Technology – so what's next?**

**Laurie Rodriguez**, Senior product manager, Sage

**Gary Olynik**, Sage Accountant Network accountant advocate, Sage

So I get 'why cloud technology', but specifically how do cloud, mobile and analytic tools enable me to deliver advisory services. Walk away with the knowledge and awareness of how to use the cloud, mobility and analytics software (like Sage View) to immediately offer Advisory Services. We want you to walk away with tangible examples (Financial Performance reviews (i.e. Growth, Profitability, Cash Flow), Benchmarking services, and Proactive consulting).



Laurie Rodriguez



Gary Olynik

3:00 - 3:30 pm **Exclusive Show viewing time in the exhibits.** See examine and compare accounting, business, finance and services at one time and one place in New Jersey.

Session 16 3:30 - 4:20 pm (1 CPE credit)

## **The Future Ready CPA – Are You Ready for the Challenge?**

**Samantha Mansfield**, Sr Manager of Corporate Communications and Program Development, CPA.com

While many offices and clients are already onboard with smart systems, there is a requirement for personal skills to get the whole team onboard. Smart systems are readily available. Reasonable costs and applications can be set up easily. What is required is your team's acceptance and application. Learn some easy steps to bring your office and your clients onboard available smart technology.



Samantha Mansfield

Show concludes at 3:30 pm. CPE program concludes at 4:20 pm. Speakers and Program subject to change.

# 2015 New Jersey Accounting, Business & Technology Show

May 13-14, 2015 Weds-Thurs Meadowlands Exposition Center

355 Plaza Drive, Secaucus, NJ at Harmon Meadows, adjacent to the NJ Turnpike and Route 3 and major NJ roadways



Rick Richardson, CPA, CITP, CGMA, the keynote speaker, Day One, will lead a whole new session on what you need to know about today's new technology, plus predictions for your business life.



Informative exhibitors will show new systems live on the show floor, with knowledgeable experts to explain and show how to use these systems in your practice.



Exhibitors will give live demonstrations of their latest accounting, business, financial systems, technology. NEW- Attend QuickBooks Academy in 2015.



CPE is free each morning from 8-9:40 am with 2 CPE credits. The whole day CPE is only \$45 with 6 CPE credits, plus the Show and morning coffee service.



See, examine, and learn about new products and services to improve your accounting practice and your client operations.

## CPE INFORMATION

Credit hours of 50-minutes for 1 CPE credit, 100 minutes for 2 CPE credits are recommended in accordance with the Statement on Standard for Continuing Professional Education (CPE) Programs published by the NASBA.



Method of Presentation  
Delivery Method  
Level of Knowledge  
Recommended CPE Credit

Lecture, Q&A  
Group - Live  
Basic  
50 min session=1 CPE  
100-min session= 2 CPE  
None  
None

Prerequisite  
Advance Preparation

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 addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417.  
Web site: [www.nasba.org](http://www.nasba.org) Sponsor ID number 104942  
For more information regarding administrative policies such as complaint and refund, contact Flagg Management at 212-286-0333 or [flaggmgmt@msn.com](mailto:flaggmgmt@msn.com).



See all the exhibits next to the conference sessions. There will be ample opportunity to attend the free CPE general sessions each morning from 8:00 to 9:40 am, and then visit the exhibits, from 9:30 to 3:30 pm, Weds; 9:30 to 3:30 pm, Thurs.

Visit our website and register in advance at: [flaggmgmt.com/nj](http://flaggmgmt.com/nj)

Accounting Today  
 AccountingWEB  
 Accounting Practice Sales  
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 ACE IT Solutions  
 ADP  
 Allstate Corporate Services Corp.  
 Alpine Mortgage Services, LLC  
 American Express Global Corporate Payments  
 Ameriprise Financial  
 APS Pension & Financial Services Inc.  
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 Drake Software  
 DST Retirement Solutions LLC  
 Dun & Bradstreet Credibility Corp  
 EasyChecklistABC  
 Fairleigh Dickinson University  
 FFP Wealth Management  
 Div Future Financial Planners

Gallagher – Bollinger  
 GetNetSet  
 GruntWorx  
 Heartland Ovation Payroll  
 IMA (Institute of Management Accountants)  
 InsureYourCompany.com  
 Intuit  
 Investors Bank  
 Jetpack Workflow  
 Journal of Accountancy  
 MR Valuation Consulting, LLC  
 NCCPAP  
 New Clients Incorporated  
 New Jersey Chamber of Commerce  
 NexVue Information Systems  
 NJBIZ  
 Office Tools  
 Parasec  
 Paychex, Inc.  
 Perkaroma-Green Mountain Coffee  
 Pransform, Inc.  
 The Progressive Accountant  
 PlanGuru  
 Precise Payroll LLC  
 QXAS Inc.

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 NJ Chamber of Commerce



Face-to-face contact will save months of looking for person-to-person know-how from your vendors. They're coming to see you.

**The 21st Annual 2015 New Jersey Accounting, Business & Technology Show**

Your best investment to see iPads, iPhones, Internet, Smart Systems for finance, banking and accounting.

- See what's new with accounting software and hardware.
- See what's new with iPads, iPhones, Cloud, portals, social media.
- See new banking, finance and business systems.
- Network with your peers.
- Keep up to-date with smart systems and services including banking and financial services

**HOTEL RESERVATIONS**

**Phone for hotel reservations TODAY:**  
 A room block has been set aside for the **2015 New Jersey Accounting, Business & Technology Show.**

Holiday Inn Harmon Meadow Sportplex  
 300 Plaza Drive, Secaucus, NJ 07094  
 Tel: 1-201-348-2000 or 888-231-5540  
 Fax: 1-201-348-6035



**The Holiday Inn Harmon Meadows** has a room block reserved for the show at \$145 king plus tax. Phone 201-348-2000 and ask for "**Flagg Management/NJ Accounting Show**" for the period of Mon, May 11 through Thurs, May 14.

**The Holiday Inn is located at 300 Plaza Drive, and a short walk from the Meadowlands Exposition Center.** The Holiday Inn is in the Harmon Meadow business and shopping complex with popular and moderate priced restaurants, shopping, and a Cineplex movie theatre. Click here for driving directions.

The Holiday Inn Harmon Meadow offers 161 recently renovated guest rooms and suites, including: coffee makers, hairdryers, voice mail, dataport hookups, full size iron & ironing boards, microwave and refrigerators in all rooms. The hotel offers a full service restaurant and lounge, gift shop, and exercise room.

**Located just three miles from the Lincoln Tunnel**, two miles from the Meadowlands Sports Complex and Continental Airlines Arena, and a short walk from the Meadowlands Exposition Center. The hotel is attached to an outdoor mall featuring shops, restaurants and movie theaters. There is a NJ Transit Bus stop within walking distance, and complimentary shuttle service within a four mile radius of the hotel in New Jersey only.

# 2015 New Jersey Accounting Show

## 21st Annual May 13-14, Wed-Thur Meadowlands, Secaucus

### CONFERENCE REGISTRATION

#### 3 Ways to Register

##### ONLINE

flagmgmt.com/nj  
save time and register online

##### FAX:

212-286-0086

##### MAIL:

Flagg Management  
353 Lexington Ave  
New York, NY10016

##### CONFERENCE

Wednesday, May 13  
Thursday, May 14

8 - 4:20 pm  
8 - 4:20 pm

##### FREE EXHIBITS

Wednesday, May 13  
Thursday, May 14

9:30 - 3:30 pm  
9:30 - 3:30 pm

##### CPE SESSIONS

One Day fee \$45, in advance \$55 after April 22  
Two Day fee \$80 in advance, \$100 after April 22

#### Day One, Wednesday, May 13 (\$45 in advance, \$55 after April 22)

8 - 9:40 am (2 CPE credits)

- Keynote Session 1: Rick Richardson, Technology Futures 2015

11-11:50 am (1 CPE credit)

- Session 2: What is Your Value  
 Session 3: Show Me the Money

1:20 - 3:00 pm Concurrent Sessions. Choose one. (2 CPE credits)

- Session 5: QuickBooks Academy  
 Session 6: Winning Competitive Landscape

3:30- 4:20 pm Concurrent Sessions. Choose one. (1 CPE credit)

- Keynote Session 7: Joel L. Naroff, Where is the Economy Headed?

#### Day Two, Thursday, May 14 (\$45 in advance, \$55 after April 22)

8 - 9:40 am (2 CPE credits)

- Keynote Session 10: CPA Technology for the Cloud, Erik Asgeirsson

11 - 11:50 am (1 CPE credit)

- Session 11: Cyber Threats  
 Session 12: New Jersey Tax Update

1:20 - 3:00 pm Concurrent Sessions. Choose one. (2 CPE credits)

- Session 14: QuickBooks Academy  
 Session 15: Technology-Based Advisory Services

3:30 - 4:20 pm (1 CPE credit)

- Session 16: The Future Ready CPA

Must indicate Sessions you wish to attend.

Substitutions permitted with written notification.

### HOTEL RESERVATIONS

#### Special Room Block for the 2015 Show, Mon, May 11-Thurs, May 14

The Holiday Inn Harmon Meadows has a room block reserved for the show at \$145 king plus tax. Phone 201-348-2000 and ask for "Flagg Management/NJ Accounting Show" for the period of Mon, May 11 through Thurs, May 14.

#### Who Should Attend

- New Jersey 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

Flagg Management Inc  
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### FREE SHOW BADGE REGISTRATION

Please Print. Multiple requests on duplicates of this form.  
Online or Fax. Deadline May 1. Confirmation will be sent beginning April 22.  
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 13 (\$45. in advance. \$55. after April 22).  
 Full Day, Thur May 14 (\$45. in advance. \$55. after April 22).  
 Two Full Days, May 13-14 (\$80. in advance. \$100. after April 22).

#### Method of Payment

- Check payable to Flagg Management Inc  
 AMEX  Visa  MasterCard

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

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

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