

5th Annual

# 2013 Accounting Technology

## New York Show & CPE Conference

May 1-2, Weds-Thurs Penn Plaza Pavilion,  
Pennsylvania Hotel, NYC

7th Ave and 33rd St, right across from Penn Station and Madison Square Garden

**Register to Attend the Free Show, Weds-Thurs in the Heart of New York.**

**Free CPE Keynotes Each Morning from 8-9:40 am with Two Free CPE Credits.**

**Come hear leading accounting and CPA speakers on the all-star CPE conference program.**

**The CPE educational sessions are low-cost at \$45 per day with 6 CPE credits**, or \$80 for two days with 12 CPE credits. The CPE is accredited by the New York State Education Department, Albany.

**The two-day Free show will focus** on accounting, business, tax, mobile, iPads, iPhones, Internet systems, financial, banking for New York accountants.

**Free Show:**

Weds, May 1 10 – 4 pm

Thurs, May 2 10 – 4 pm

**CPE Conference:**

Weds, May 1 8 – 4:50 pm

Thurs, May 2 8 – 4:50 pm

**Free Show.**

**Free CPE Keynotes.**

**Low-Cost CPE at \$45./Day.**

2013 Sponsors



For more information: Flagg Management Inc  
353 Lexington Ave, New York, NY 10016  
212-286-0333 Fax: 212-286-0086  
flaggmgt@msn.com



**Jim Baker**  
Publisher  
CPA Practice Advisor

2 Free CPE credits  
Day 1 Wed, 8 am



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

2 Free CPE credits  
Day 2, Thu 8 am



**Erik Asgeirsson**  
President & CEO,  
CPA2Biz Inc



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



**M. Darren Root**  
CPA, CITP, Mgng Partner,  
Root & Assoc LLC



**Gregory L. LaFollette**  
CPA, CITP, CFF, CGMA  
VP Product Strategy  
CPA2Biz, Inc



**Jennifer Warawa,**  
Vice President,  
Sage North America



**Milla Austin, CPA,**  
CITP, EA, Inte Sls Training  
& Dev Mgr, CCH Tax  
& Accounting N America



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



**David A. Bergstein**  
CPA, CITP, Dir of Strategic  
Relationships, CCH, a  
Wolters Kluwer Business



**Max T. Krotman**  
Esq., Managing Partner  
Globalforce International



**Justin M. Schafer**  
Reg Bus Dev Officer, Bank  
of America Practice Sols



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



**Jordan C. Kleinsmith**  
Product Mgmt, Enter-  
prise, Thomson Reuters



**Rick Telberg**  
President, CEO,  
Bay Street Group LLC



**Chandra Bhansali**  
President  
AccountantsWorld

Register Today  
for the FREE Show and  
Low-cost CPE at only \$45/day.

For complete details and to register online-

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

# 5th Annual 2013 Accounting Technology New York CONFERENCE PROGRAM

## DAY ONE, WEDNESDAY, May 1

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 New York State Education Department, Albany

**Conference registration and free coffee service : 7:30-8:00 am** 18th floor Conference Ballrooms, Hotel Pennsylvania, connected to Penn Plaza Pavilion, on the 1st and 2nd floors by special elevators that will operate for the entire show and connect to the 18th floor Conference. **Come early for free coffee.**

Session 1 8 - 9:40 am 18th floor, Hotel Pennsylvania, Conference Session Room. General Session (2 CPE Credits)  
**Hot Accounting Technology for Your Accounting Practice and to Serve Your Clients Better. iPads, iPhones, Mobile, Cloud, New Microsoft Windows 8 and Office 2013. Predictions for the year. Predictions from last year. Rick will keep you up to date.**

**Dana 'Rick' Richardson**, CPA, CITP, Richardson Media & Technologies, Canton, CT  
Hot new accounting technology to improve your practice and serve your clients better. iPads, iPhones, mobile, Cloud, Software as a Service, new Microsoft Windows 8 and Office 2013. Predictions from last year. Predictions for this year. Rick is a national speaker for AICPA, California CPA Society, Illinois CPA Society. Rick is a CPA and knows what you need to run your business and your clients' business.



Dana 'Rick' Richardson

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

Session 2 11–11:50 am 18th floor, Hotel Pennsylvania, Conference Session Room (1 CPE credit)

### **How to Build a More Productive Office.**

**M. Darren Root**, CPA, CITP, Managing Partner, Root & Associates LLC, Bloomington, IN and Executive Editor, CPA Practice Advisor

Put available and easy to use accounting tools to work to increase productivity in your office, improve client service in your office and on the road, and add to your bottom line. Darren Root is the Managing Partner of Root & Associates LLC of Bloomington, IN and he'll share his experience to help you build a more productive office.



M. Darren Root

Session 3 12 noon – 1:20 pm **Break in the exhibit hall to see the exhibits. Join us for a free hot dog and a beverage. You don't have to leave the hotel to have a bite to eat.** Penn Plaza Pavilion on the 1st and 2nd floors by special elevators that will operate for the entire show period and 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 4 1:20 - 3:00 pm  
**Cloud Computing and Supporting Small Businesses using QuickBooks Online.**

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

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.



MB Raimondi

Session 5 1:20 - 3:00 pm  
**Marketing Your Practice as a Tech-Savvy Firm. Providing unique value to your clients through mobile and web-based technology.**

**Jordan C. Kleinsmith**, Product Management, Enterprise, Thomson Reuters, Dexter, MI

The tax and accounting profession is in the midst of a technological upheaval. Clients have come to expect a higher level of accounting technology from their CPA firms. Clients want better communication, social media, 24/7 online services, mobile technology and smart devices – in short, more service. Join us for an overview of how you can put existing technology to work to serve your clients better and increase your bottom line.



Jordan C. Kleinsmith

3 - 4 pm **Break in the exhibit hall to see the exhibits.** Penn Plaza Pavilion on the 1st and 2nd floors by special elevators that will operate for the entire show period and 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 6 4:00-4:50 pm  
**Cloud Computing. Putting Your Data to Work in the Cloud.**

**Dr. Chandra Bhansali**, President, AccountantsWorld, Hauppauge, NY  
**Rick Telberg**, President, CEO, Bay Street Grp LLC, East Hampton, NY

Cloud Computing is an established business system to efficiently reduce your cost, to store data, access data, and quickly and easily put data to work in your practice. Cloud Computing is working at all levels of business, finance, and accounting from a one person office to a multi-corporation.



Chandra Bhansali



Rick Telberg

Session 7 4:00-4:50 pm  
**Software as a Services: SaaS tools to improve your practice and serve your clients with powerful accounting and business systems.**

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

Cut through the fog of Cloud to put SaaS to work in your business. SaaS is a robust system to harness the power of online systems without the expense and hassle of maintaining in-office systems.



Greg LaFollette

# DAY TWO, THURSDAY, May 2

**Penn Plaza Pavilion, Pennsylvania Hotel, NYC**  
7th Ave and 33 St, across from Penn Station and Madison Square Garden

**Penn Plaza Pavilion, Pennsylvania Hotel, NYC** 401 7th Ave at 33 St, across from Penn Station and Madison Square Garden  
**Conference registration and free coffee service:** 7:30-8:00 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. **Come early for free coffee.**

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

## The Rise of The Digital CPA

**Erik Asgeirsson**, Erik Asgeirsson, President and CEO, CPA2Biz

The impact of technology on the accounting professional is as profound as anytime in the history of the profession—it truly is the age of the Digital CPA. Hear CPA2Biz President and CEO, Erik Asgeirsson, discuss the key technology drivers across the firm landscape and where he sees the most significant transformation taking root.



Erik Asgeirsson

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

Session 11 11- 11:50 am (1 CPE credit)

## With Easy Steps, Bring Your Accounting Technology into Your Practice to Serve Your Clients Better.

**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

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. Jim will cover accounting technology that is already at work at small and mid-sized firms to increase productivity for accounting firms and your client operations. Among other responsibilities, Jim is a consultant for the FBI in matters of technology and computer security.



James C. Bourke



Daniel Hood

Session 12 12 noon – 1:20 pm **Join us for a free hot dog and a beverage. You don't have to leave the hotel to have a bite to eat.** Penn Plaza Pavilion on the 1st and 2nd floors by special elevators that will operate for the entire show period and 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 13 1:20 - 3 pm

## Cloud, Mobile, Tablets, Smartphones – How CPAs Stay Connected.

**David A. Bergstein**, CPA, CITP, Director of Strategic Relationships, CCH, a Wolters Kluwer Business, Riverwoods, IL

**Milla Austin**, CPA, EA, CITP, Sales Training Mgr, CCH, a Wolters Kluwer Business, Riverwoods, IL



David A. Bergstein



Milla Austin

Accounting practices are changing. Cloud, Mobile, Tablets, Smartphones are now part of the accounting services that you must offer your clients. CPAs can stay connected to serve their clients better. At the office, on the road, in your home, and in your car. Hear what's available to increase client satisfaction and your bottom line.

Session 14 1:20 - 3 pm

## Fundamentals of High Performing Accounting Firms.

**Jennifer Warawa**, Vice President, Partner Programs & Channel Sales, Sage North America, Lawrenceville, GA

What truly separates high performing accounting firms from the average ones? Jennifer Warawa, Sage North America will share research, insights and tips regarding what high performing accounting firms do differently. How you can apply these concepts to drive measurable results in your own firm. Even very successful businesses have areas they can improve upon. This session will help you understand the changes you can make in yours that will have the greatest impact. If you think it's time to change the way you run your firm, raise the bar on how you serve your clients and dramatically increase your profitability, this session is a must attend.



Jennifer Warawa

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

The show concludes at 4 pm, but there is time to attend the 4 pm session on M & A.

Session 15 4 - 4:50 pm (1 CPE credit)

## What is Your Business Worth – If You are Looking to Sell Your Business or Buy a New Business, What you Should Know About Valuations, Financing, and Payout Options.

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

**Justin M. Schafer**, Regional Business Development Officer, Bank of America Practice Solutions

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.



Max T. Krotman



Justin M. Schafer

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

# 5th Annual 2013 Accounting Technology New York

## May 1-2, Weds-Thurs Penn Plaza Pavilion, Pennsylvania Hotel, NYC

### Free CPE Walking Tour Each Day on the Show Floor

2 Free CPE credits will be provided for this 100 minute walking tour.

Weds, May 1 1:20-3 pm

Thurs, May 2 10:20-12 noon

Penn Plaza Pavilion, 401 7th Avenue at Pennsylvania Hotel, NYC.

**M. Darren Root**, CPA, CITP,  
Managing Partner, Root &  
Associates LLC, Bloomington, IN  
and Executive Editor,  
*CPA Practice Advisor*



M. Darren Root

**Jim Baker**,  
Publisher, *CPA Practice Advisor*,  
Fort Atkinson, WI



Jim Baker

The 2013 CPE Walking Tour is your opportunity to attend live presentations on the show floor of leading accounting technology exhibitors explain their programs at their exhibit space.

The Walking Tour will assemble in advance and Darren Root will provide an overview of the exhibitors to be covered in the 100 minute session.

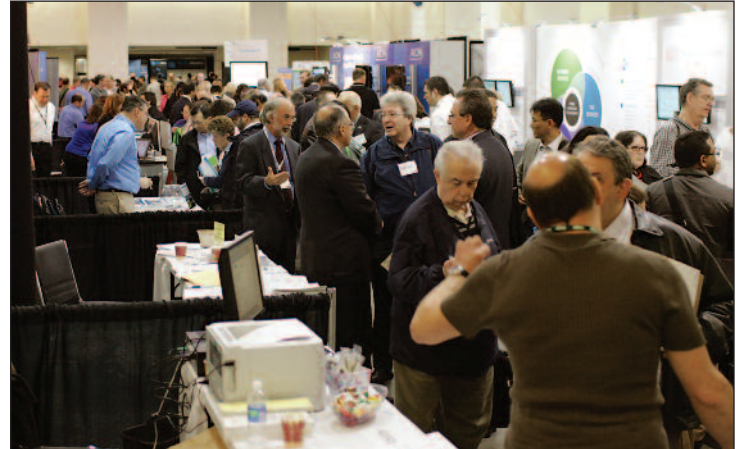
Following that overview 6 exhibitors will be visited, each one providing a live demonstration at their booth as part of the tour.

CPE credits will be awarded at the conclusion of the 100 minute Walking Tour.

The Walking Tour will take place Weds, May 1 from 1:20-3 pm and Thurs, May 2 from 10:20-12 noon on the show floor, Penn Plaza Pavilion mezzanine level of the Pennsylvania Hotel.

Exhibitors on the tour will be announced prior to the show.

This Walking Tour is presented under the auspices of the *CPA Practice Advisor*.



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.



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.

#### CPE INFORMATION

New York State CPE Credit Information

Method of Presentation: Lecture, Q&A

Delivery Method Group: Live

Level of Knowledge: Basic

Recommended CPE Credit 50 min sessions = 1 CPE credit

100-min sessions = 2 CPE credits

Prerequisite: None

Advance Preparation: None

CPE appropriate subject area: Specialized knowledge and applications related to specialized industries.

The Accounting Technology New York is licensed and approved as a Sponsor by The State Board for New York Public Accountancy and the license is number # 001779. As a sponsor, we will provide a certificate of completion for those courses attended, NY Sponsor License number, date and location of program, continuing professional educational credits granted and subject area for which credit was earned.

Flagg Management, Inc - 353 Lexington Ave, NY, NY 10016  
(212) 286-0333 Fax (212) 286-0086 [flaggmgt@msn.com](mailto:flaggmgt@msn.com)

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, from 10 to 4 pm, Weds-Thurs.

Visit our website and register in advance at: **flagmgmt.com/ny**

- |                                       |   |
|---------------------------------------|---|
| AccountingWEB                         | Insperty                                |
| AccountantsWorld                      | Intuit                                  |
| Accounting Today                      | Journal of Accountancy                  |
| ADP                                   | New River Innovation / Beyond415™       |
| Allstate Corporate Services Corp.     | Office Tools Professional               |
| American Express Open                 | PenSoft                                 |
| APS Pension & Financial Services Inc. | Pransform Services, Inc.                |
| Attorneys Corporation Service         | The Progressive Accountant              |
| Avalara                               | Queue Associates                        |
| Bank of America                       | Sage                                    |
| Binding Systems of America            | Sift Media                              |
| Bisk Education, Inc.                  | Sterling National Bank                  |
| CCH, a Wolters Kluwer business        | The Tax Adviser                         |
| CCH Small Firm Services               | Tax Materials, Publishers of TheTaxBook |
| Citrix ShareFile                      | TaxWorks, Div. RedGear Technologies     |
| CPA Practice Advisor                  | TC Practice Management                  |
| CPA2Biz, Inc.                         | Thomson Reuters, Tax & Accounting       |
| Drake Software                        | TPS Software Inc.                       |
| eFileCabinet, Inc.                    | Verizon Wireless                        |
| Emochila                              | Wave Accounting                         |
| Future Financial Planners, Inc.       | Wells Fargo                             |
| Globalforce International Inc.        | WSG Systems Corp.                       |
| Going Concern                         | Yodle                                   |
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- CPA2Biz
- Intuit
- Sage
- Thomson Reuters, Tax & Accounting
- Accounting Today
- CPA Practice Advisor
- Journal of Accountancy
- The Progressive Accountant
- Sift Media/AccountingWEB/Going Concern
- The Tax Adviser
- Greater New York Chamber of Commerce



Face-to-face contact will save months of looking for technical and operational know-how from your vendors. They are there to see you.

**The 5th Annual 2013 Accounting Technology Show, May 1-2** Your best investment to jump-start your accounting practice with 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.

**HOTEL RESERVATIONS**

**Phone for hotel reservations TODAY:**  
A room block has been set aside for the **2013 Accounting Technology New York.**

**Hotel Pennsylvania's PENN 5000**, Penn Station at 7th Ave and 32nd St, 212-736-5000 ext 8460 (toll free at 800-223-8585). Ask for "Accounting Technology New York 2013" for the period of Tues, April 30 through Fri, May 3, room rate \$169 single/double plus tax (one bed), \$189 single/double plus tax (two beds). Special check in area, left side of Lobby. Continental breakfast included with both \$169 and \$189.

**Make Hotel reservations online at: [www.HotelPenn.com](http://www.HotelPenn.com)**  
**Use the group code: ACC043013**

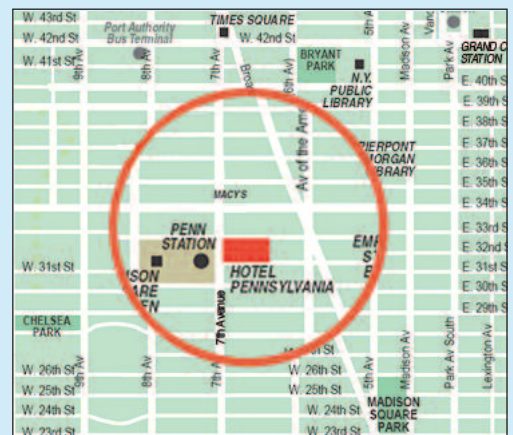
This historic and trendy hotel is in an excellent Midtown location directly opposite Madison Square Garden and Amtrak's Penn Station. Hotel Pennsylvania is within walking distance of the business, entertainment and fashion districts, including Macy's, the Empire State Building, and Times Square.

**Directions to Hotel.** The hotel is directly across 7th Ave from Penn Station and Madison Square Garden between West 32nd and West 33rd Streets at 401 7th Ave. Take Long Island Railroad to Penn Station and walk directly across 7th Ave to the hotel.

Subway trains stop at the station at 34th Street and 7th Ave on the 1 and 9 train lines. There are also subway stops for other train lines on 34th Street and 6th Ave and 34th Street and 8th Ave.

Cross town buses are M34 that stops on 7th Ave and 34th Street.

Taxis are readily available dropping and picking up passengers at Penn Station.



# 2013 Accounting Technology New York

## 5th Annual May 1-2, Wed-Thu Penn Plaza Pavilion

### CONFERENCE REGISTRATION

#### 3 Ways to Register

##### ONLINE

flagmgmt.com/ny  
save time and  
register online

##### FAX:

212-286-0086

##### MAIL:

Flagg Management  
353 Lexington Ave  
New York, NY10016

##### CONFERENCE

Wednesday, May 1  
Thursday, May 2

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

##### FREE EXHIBITS

Wednesday, May 1  
Thursday, May 2

10 - 4 pm  
10 - 4 pm

##### CPE SESSIONS

One Day fee \$45, in advance \$55 after April 19  
Two Day fee \$80 in advance, \$100 after April 19

#### Day One, Wednesday, May 1 (\$45 in advance, \$55 after April 20)

8 - 9:40 am (2 CPE credits)

Session 1: Rick Richardson, Hot Accounting Technology

11-11:50 am (1 CPE credit)

Session 2: Build a More Productive Office

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

Session 4: Cloud Computing using QuickBooks Online

Session 5: Marketing Your Practice

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

Session 6: Putting your Data to Work in the Cloud

Session 7: SaaS – What you need to Know

#### Day Two, Thursday, May 2 (\$45 in advance, \$55 after April 19)

8 - 9:40 am (2 CPE credits)

Session 10: Tech Trends: Mobile, Cloud, Social Media, Practice Mgmt

11 - 11:50 am (1 CPE credit)

Session 11: Accounting Technology in Your Practice

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

Session 13: Cloud, Mobile, Tablets, Smartphones

Session 14: Fundamentals of High Performing Acct Firms

4 - 4:50 pm (1 CPE credit)

Session 15: What is your Business Worth?

Must indicate Sessions you wish to attend.

Substitutions permitted with written notification.

### HOTEL RESERVATIONS

#### Special Room Block for the 2013 Show, Apr. 30 - May 3

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 2013" for the period of Tues, Apr 30 through Fri, May 3, room rate \$169 single/double plus tax (one bed), \$189 single/double plus tax (two beds). Special check-in area, left side of Lobby. Continental breakfast included with both \$169 and \$189.

#### 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

Flagg Management Inc  
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New York, NY 10016  
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### FREE SHOW BADGE REGISTRATION

Please Print. Multiple requests on duplicates of this form.  
Online or Fax. Deadline April 19. 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 1 (\$45. in advance. \$55. after April 19).

Full Day, Thur May 2 (\$45. in advance. \$55. after April 19).

Two Full Days, May 1-2 (\$80. in advance. \$100. after April 19).

#### Method of Payment

Check payable to Flagg Management Inc

AMEX

Visa

MasterCard

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

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

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