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# B K R

I N T E R N A T I O N A L

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## AMERICAS REGIONAL MEETING

**The Westin Hotel**  
**Philadelphia, Pennsylvania, U.S.A.**  
**June 5-9, 2015**

Philadelphia traces its roots back to 1682 when Quaker William Penn founded the city based on principles of freedom and religious tolerance. It was the first capital of the United States and one of the most important cities in colonial America -- both the Declaration of Independence and the Constitution were drafted and signed here. "Philly" is also home of The Franklin Institute, honoring the life and work of Benjamin Franklin, the city's most famous ambassador. Today, Philly's famous cobblestone streets and historical landmarks showcase a modern, 21<sup>st</sup> century city of art, culture, and culinary delights – the perfect venue for us to freely exchange innovative ideas and best practices.



### HOTEL

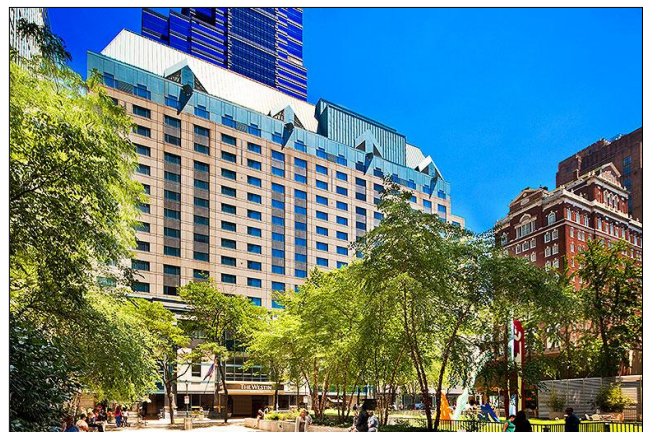
Our meeting will take place at the Westin Hotel, located in the heart of Philadelphia's business and entertainment areas, adjacent to Rittenhouse Square and a short stroll from Independence National Park. The Westin is also connected to The Shops at Liberty Place, offering more than 70 specialty stores and boutiques.

BKR has secured a special deluxe room rate of **\$229** per night for single or double occupancy, plus the current tax of 15.5%. Room reservations must be made by **Wednesday, May 13**, to insure rates and availability.

To reserve your room online, simply click the hotel link [HERE](#).

Alternatively, you may call the hotel's reservations line at **1-888-627-8153** and reference the BKR International Meeting to take advantage of the discounted rate.

Hotel check-in time is 3:00 p.m., and check-out



is at 12:00 noon. However, every effort will be made to have your room ready when you check in. In the event you need to cancel your hotel reservation, you must notify the hotel **at least 24 hours prior to your arrival** in order to avoid being charged the first night's deposit.

## **MEETING REGISTRATION**

We are pleased to advise that **each U.S. and Canadian member firm is entitled to one free partner registration to the meeting**, which includes all sessions, conference materials, breakfasts, lunches, coffee breaks, group dinners and social events and unlimited use of BKR's Hospitality Suite. *The Saturday tour and golf are not included.* All other firms, additional partners, and all companions are responsible for payment of registration and event fees indicated on BKR's online registration site.



Click **HERE** to access the online registration site. If you have any questions about the online registration process, please contact the Executive Office.

Meeting registration, along with applicable payment online by **credit card only**, is due by **Wednesday, May 13.**

In the event you need to cancel your meeting registration, you must notify the Executive Office by **Friday, May 22**, in order to receive a full refund.

**BKR IS PAPERLESS!** Except for BKR's Statistical Analysis, which will be printed for everyone, you have the option to download your meeting materials from our website before the meeting. **Please be sure to select the option you prefer on your online registration form.** We will NOT have extra copies of the materials on site.

For more information regarding administrative policies, such as complaints, refunds, and cancellations, please contact the Executive Office at 1-212-964-2115.

## **AIR TRANSPORTATION**

Philadelphia International Airport is located approximately eight miles from our hotel. BKR has secured the following airline discounts:

**Delta Airlines:** 2% - 5% off the lowest published fare. Log on to [www.delta.com](http://www.delta.com), or contact Delta meeting reservations at **1-800-328-1111**. Please use Discount Code: **NMKJ3**. When booking online, select **Book a Trip**, click on **Advanced Search**, and enter the discount code on the **Search Flights** page.



**United Airlines:** 2% - 10% off published fares. If booking through a travel agent or United Meeting Works at **1-800-426-1122**, provide the following information: Agreement Code: **913040** and Z Code: **ZTVN**. Or, save an additional 3% by booking your own reservation at [www.united.com](http://www.united.com), and enter Offer Code: **ZTVN913040** in the Offer Code box.

Outside of the United States, please call your local Delta or United Airlines reservation office.

As always, be sure to book your airline ticket at least **30 days prior to travel** to secure the lowest fares.

## **GROUND TRANSPORTATION**

Trains leave the airport for downtown every 30 minutes and cost \$8 one way. Taxis will charge a flat rate of \$28, plus tip. Both can be found outside the baggage claim areas.

## **PARKING**

The Westin offers valet parking for \$51 per night and self-parking for \$36.

## **HOSPITALITY SUITE**

Catch up with friends and make new ones over refreshments and light snacks in the Georgian Room, located on the lobby level. Our Hospitality Suite will open each afternoon at 4:00 p.m., from Friday, June 5 through Tuesday, June 9, where you may help yourself to your favorite wine, beer, soft drinks, and light snacks. Be sure to stop in when you arrive to pick up your program materials and name badge.

## **CONTINUING PROFESSIONAL EDUCATION**

U.S. members will earn approximately 19½ hours of CPE credit by attending all of the sessions on Saturday, Monday, and Tuesday, subject to the NASBA requirements stated at the end of this letter. Members attending BKR's Governmental/Not-for-Profit Accounting and Auditing Practice Group Meeting on June 5 will earn approximately 7½ additional CPE credits.



## **LEARNING OBJECTIVES**

- Apply best practices from successful growing firms to preserve their firm’s culture and develop a thriving growth-driven business;
- Learn how to apply research on human behavior to build and maintain loyal relationships with clients;
- Develop accounting and attest standards and quality controls;
- Utilize marketing and communications techniques to improve recruiting, client retention, and business development;
- Learn how to apply the theory of conscious capitalism to build a conscious business infused with passion, purpose, and creativity; and
- Integrate technology advancements in the workplace.

## **BUSINESS PROGRAM HIGHLIGHTS**

Please see the attached **AGENDA** and the **BUSINESS PROGRAM/BIOGRAPHIES** section, beginning on page 10 of this document, for speaker biographies and program outlines.

### **FRIDAY, JUNE 5**

#### ***Governmental/Not-for-Profit Accounting and Auditing Practice Group Meeting***

The Governmental/Not-for-Profit Accounting and Auditing Practice Group will meet for a full day from 8:30 a.m. - 4:30 p.m. Detailed information will be e-mailed separately. All members with a practice in this niche (or who are considering one) are invited to attend.

#### ***Reunion Program for all BKR Leadership Institute Graduates***

BKR’s Leadership Institute alumni will meet for a full day program with Consultant Coral Rice on Friday, June 5, from 8:30 a.m. - 4:30 p.m. Those who wish to stay over and attend BKR’s Accounting and Auditing Update or the Federal Tax Update on Saturday (see below) may do so for the discounted price of \$100. Detailed information will be e-mailed separately.



## **SATURDAY, JUNE 6**

Saturday's program features concurrent updates on both audit and tax, from 7:45 a.m. - 1:00 p.m. Each workshop is designed to help keep your firm on the cutting edge of technical developments in the profession.

**Accounting and Auditing Update** – Ralph Nach, author and instructor at 20•20 Services, will address the latest A&A issues and updates, including changes to the Accounting Standards Codification, private company financial reporting, revenue recognition, compilation and review developments, audit and assurance services, and ethics.

**Federal Tax Update** – Michael Schlesinger, Esq., will present the 2015 federal tax update, with emphasis on the legislative and judicial issues that affect you and your clients, including estate and gift tax planning, the Able Act of 2014, and Repair and 751 Regulations, to name only a few.

## **MONDAY, JUNE 8**

After our official “Welcome to Philadelphia” by our hosts, Managing Partners Bob Fischer and Alan Gubernick, regional Chairman Jason Tonjes (Omaha) will present his annual report, review the slate of board nominees, BKR's financial statements and budget, as well as a new dues formula, and call for a vote on each. The morning business session will also include a keynote address by Carl George, the nationally renowned consultant and former managing partner of Clifton Gunderson,



who will present “Lessons Learned and Best Practices from the Frontline.” Finishing up the morning session, Don Timmins, retired partner of BKR's Ottawa member firm, will discuss the results of BKR's 2015 Member Firm Statistical Analysis.

Monday afternoon will be devoted to the ever-popular breakout sessions, repeated twice to give you an opportunity to participate in two different sessions, on:

- Audit Best Practices;
- Drilling Down Into the 2015 Statistics;
- How to Recruit Like the Big 4; and
- M&A for Buyers as a Viable Growth Strategy

Please be sure to choose and register for both breakout sessions on the online registration form.

## **TUESDAY, JUNE 9**

Today's session will begin with a panel of BKR board representatives to update us on the latest developments in their regions. Following, we will hear from three BKR Practice Groups on their initiatives. The morning's keynote speaker, James Kane, will present "The Loyalty Switch: How to Make Anyone Loyal to You, Your Organization, or Your Cause." President and chief operating officer of BKR's Strategic Alliance Partner, 1<sup>st</sup> Global, David Knoch will conclude the morning session by presenting his thoughts on conscious businesses and leadership in his session, "Conscious Capitalism: Enabling Human Flourishing."

After lunch, Ingenuity's communications and marketing consultant, Christine Nelson, will share practical insights on how to communicate value to clients in her presentation, "Compete to Win More Recruits, Clients, and Target Acquisitions."

Tuesday's program will wrap up with technology and disaster planning and recovery with IT Expert Bill Walter, from BKR's Baltimore firm, who will discuss recent trends in technology, data security, and cloud computing. Technology Consultant David Bergstein, with Intuit, will tie it all together in "Automating the Accounting Practice."

Our program will end with a drawing for the latest iPad, but you must still be in the meeting room to win it!

## **SOCIAL AGENDA HIGHLIGHTS**

### **SATURDAY, JUNE 6**

#### ***Breakfast***

A full hot and cold breakfast buffet will be available each morning from 7:00 a.m. - 9:00 a.m. in Salon III, located on the lobby level.

#### ***Flavors of Philadelphia Food Tour – 1:30 p.m. – 4:00 p.m. (Please note that this is a walking tour.)***

Sample Philly's most popular food favorites while learning about how these iconic foods came to be. You'll eat like a local on this casual and entertaining tour that takes place in the heart of





Philadelphia and includes five stops. You may want to skip lunch! This is not only a tasting adventure, but a full meal that includes classic Philly eats like cheese steaks, cheese whiz fries, tomato pie, soft pretzels, and sweets from the world-famous Reading Terminal Market.

Get the scoop on Philly's food history with quirky stories and insider tips about the best places to eat like a Philadelphian while enjoying some first class sightseeing. Local beer or a glass of wine will be provided! Get ready to enjoy! **Space for this tour is limited! First come, first served.**

### ***Welcome Reception and Dinner at the Pyramid Club***

Tonight, join your colleagues for our Welcome Reception and buffet dinner high above the city at The Pyramid Club; a private club strategically located 52 floors high above City Center. Ever since its opening in 1993, the club has served as the central meeting point for Philadelphia's business, social, cultural, academic, and political leaders. Enjoy the sunset and amazing views of many local landmarks such as City Hall, The Pennsylvania Convention Center, the Ben Franklin Bridge, the Museum of Art, and both the Delaware and Schuylkill Rivers, while enjoying the great food and wine of "The City of Brotherly Love."

### **SUNDAY, JUNE 7**

#### ***Golf at The Ace Club***

All BKR golfers are invited to participate in BKR's annual tournament on Gary Player's signature course at the exclusive Ace Club, [www.theaceclubonline.com](http://www.theaceclubonline.com). A buffet lunch will be provided prior to tee off. **Note: Space is limited. Register early to guarantee a spot! First come, first served.**



#### ***The Colonial Experience Tour and Lunch – 9:00 a.m. - 2:30 p.m.***

This morning, we begin our day with an exciting opportunity to view Philadelphia through the eyes of our country's founding fathers. The Colonial Experience is an interactive tour that highlights some of the city's most significant and historic landmarks, including Elfreth's Alley,

America's oldest residential street, Congress Hall, home of the first United States Congress, as well as Carpenter's Hall, site of the first Continental Congress. Our tour will include several off-coach stops, including Franklin Court, the site of Franklin's home in the city's historic district, Independence Hall, the Betsy Ross House, and Old City Hall, site of the first Supreme Court.

Following the tour, lunch will be served aboard the legendary Moshulu, the world's oldest and largest square rigged sailing vessel still afloat, and the only restaurant in the world on a tall ship!

***Evening Buffet Dinner – 7:00 p.m. – 10:00 p.m.***

After some free time for sightseeing and shopping in the afternoon, we'll convene back at our hotel for a lavish international buffet of flavors and get a unique opportunity to meet some of Philly's most colorful "locals."

**MONDAY, JUNE 8**

***Companion Tour: Philadelphia's Public Art: Murals, Fountains, Sculpture, and Gardens, and Lunch***

Today, companions will learn why Philadelphia has been called "the mural capital of the world," and also learn about the "1% for art" program that helps adorn the city with public art – including fountains, murals, mobiles, gardens, sculpture, and light. They will experience a unique tour that will include a stop at Philadelphia artist Isaiah Zagar's Philadelphia Magic Gardens, where they will see how he uses ceramic tile, mirrors, and found objects to create colorful and unusual mosaics. Companions will have a rare opportunity to get close to the city's public art, fountains, and spectacular gardens.



Following the tour, lunch will be at the artistic splendor of Positano Coast. Inspired by the owner Aldo Lamberti's seaside hometown in Italy, the ambiance of Positano Coast evokes images of an Italian seaside holiday. With life size murals of the Amalfi Coast and remarkable second floor views of Old City, companions will enjoy a memorable lunch at this distinctive restaurant, unlike any other in the city.



### ***Gala Dinner Dance at The National Constitution Center***

Tonight, we'll celebrate at The National Constitution Center, the first and only institution in America established by Congress to disseminate information about the Constitution on a non-partisan basis. During our cocktail hour at the Center's Grand Hall Overlook, we'll be able to view the many interactive exhibitions celebrating the American constitutional tradition, including **We the People** and **Freedom Rising**, through hands-on multimedia and theatrical displays and a collection of rare artifacts that includes a copy of the Emancipation Proclamation.



Afterward, enjoy a gourmet meal with open bar and the best band in Philly -- Jellyroll! Dress is "smart casual," but we ask that you wear red, white, or blue (or all three!) in observance of our patriotic venue!

### **ENTRY REQUIREMENTS**

Visitors from countries outside the U.S. (including Canada) must present a valid passport and may require additional documentation, such as a visitor's visa. Check with the nearest American Consulate or your travel agent before you travel.

### **TIME ZONE**

Philadelphia is located in the Eastern Time Zone (EST), UTC-5.

### **WEATHER AND DRESS**

The weather in early June should be mostly sunny, with average highs of 75° F (22° C) and lows of 60° F (15° C). Dress for all meetings and social events is business casual, with the exception of **The Flavors of Philadelphia Food Tour**, where comfortable attire for walking is recommended.

### **ASSISTANCE**

Your Executive Office Team, together with the partners and staff of Fischer Cunnane & Associates Ltd. and St. Clair CPA Solutions, look forward to welcoming you to Philadelphia. Please feel free to contact us at 1-800-BKR-INTL (1-800-257-4685) in North America, 1-212-964-2115 (outside North America), or [bkr@bkr.com](mailto:bkr@bkr.com) for any assistance you may need.

## **WEBSITES**

For more information on the many aspects of the Americas Regional Meeting, visit the following sites:

**Speakers:** David Bergstein: [www.intuit.com](http://www.intuit.com)  
Carl George: [www.carlgeorgeadvisory.com](http://www.carlgeorgeadvisory.com)  
James Kane: [www.jameskane.com](http://www.jameskane.com)  
David Knoch: [www.1stglobal.com](http://www.1stglobal.com)  
Ralph Nach: [www.20-20services.com](http://www.20-20services.com)  
Christine Nelson: [www.ingenuitymarketing.com](http://www.ingenuitymarketing.com)  
Jeff Phillips: [www.accountingfly.com](http://www.accountingfly.com)  
Michael Schlesinger: [www.expertsintax.com](http://www.expertsintax.com)

**Philadelphia:** [www.visitphilly.com](http://www.visitphilly.com)  
**The Westin Hotel:** [www.westin.com/philadelphia](http://www.westin.com/philadelphia)  
**The Ace Club:** [www.theaceclubonline.com](http://www.theaceclubonline.com)  
**The Pyramid Club:** [www.clubcorp.com/clubs/pyramid-club](http://www.clubcorp.com/clubs/pyramid-club)  
**The National Constitution Center:** [www.constitutioncenter.org](http://www.constitutioncenter.org)

## **BUSINESS PROGRAM OUTLINES/BIOGRAPHIES**

**SATURDAY, JUNE 6**

### **ACCOUNTING AND AUDITING UPDATE Presenter: Ralph Nach, CPA**

This session will cover:

- The State of the Profession Report;
- Compilation and Revue Developments (SSARS 21);
- Private Company Financial Reporting;
- Changes to the Accounting Standards Codification through Accounting Standards Updates for 2014;
- Revenue Recognition: Opening the Curtain on Act II;
- Audit and Assurance Services;
- Ethics: AICPA Code of Conduct Phase 2; and
- Hot Topics and Breaking Developments.

NOTE: The above will be updated for any late breaking changes.

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**RALPH NACH, CPA**  
**20•20 Services**  
**McLean, Virginia**



Ralph Nach is the author and instructional designer of 20•20's annual Accounting and Auditing Clinic. He is a sought after speaker and course facilitator throughout the United States on various topics, including the application of domestic and international accounting, auditing, financial reporting, and quality control standards, as well as non-technical topics related to leadership and interpersonal development.

In addition to Ralph's work with 20•20, he also serves as founder and CEO of SkillSmart LLC, a training and technical advisory firm, and as a consultant on litigation and financial forensics services for SS&G, Inc.

Ralph holds a BSBA degree with honors from Heller College of Business of Roosevelt University in Chicago, Illinois, and is currently serving as a member of the advisory board for that school. He served as an adjunct lecturer in graduate level accounting, finance, and economics at Northwestern University in Evanston, Illinois, and earned a certificate in mediation from Northwestern's School of Continuing Studies.

**FEDERAL TAX UPDATE**  
**Presenter: Michael Schlesinger, JD, LLM**

This session will include:

- Sophisticated Income, Estate and Gift Tax Planning: What Case Law Permits You to Do and Not Do;
- Able Accounts: a Brief Review of Who is Disabled; and
- Wade v. Comm., T.C. Memo 2014-169. Taxpayer who ceded management responsibility to his son to run an S corporation deemed to materially participate when he spent 100 hours on company activities; husband's activities flowed through the wife.

**MICHAEL SCHLESINGER, JD, LLM**  
**Schlesinger & Sussman**  
**Cranston, Rhode Island**

Michael Schlesinger has over 40 years of experience in various aspects of law, including taxation (his major interest), litigation, business planning, corporations, limited liability companies, and partnerships. Michael has written over 65 articles on taxation in various national publications, including, *The Journal of Taxation*, *Taxation for Accountants*, *The Practical Accountant*, *Estate Planning Review*, and many others, and has served on the board



of contributors of *Practice Update*. Additionally, he has been quoted a number of times in *The New York Times*, *Federal Tax Weekly*, *Fortune Small Business*, and *Smart Money*.



Michael has authored several tax columns in national publications, including *Variety* and *The Practical Accountant*. He later appeared in *Agent and Manager*. Further, he was contributing editor to *Mergers and Acquisitions* from 1973 to 1980. He is the author of several books: *The S Corporation Deskbook*, *The Small Business Tax Return Guide*, *Essential Facts: Limited Liability Companies and Practical Guide to S Corporations*, *S Corporations: Tax Practice and Analysis*, and co-author with Robert Jamison, of the CCH online publication, *Expert Treatise Library S Corporations Taxation*.

Michael is a frequent guest contributor, together with other noted tax practitioners, in CCH's analyses of major tax legislation. He has presented to various organizations, including The American Institute of Certified Public Accountants, The Practising Law Institute, The National Tax Institute, The National Association of Enrolled Agents, The National Conference of Certified Public Accountant Practitioners, The American Institute of Banking, The National Society of Public Accountants, and many others.

Michael is engaged in a number of public service activities, both within the community and in law. He is a former adjunct professor of Law, Pace University Law School, White Plains, New York, and adjunct professor of Accounting, Lubin School of Business, Pace University, White Plains, New York.

Michael, who has an LLM in Taxation from New York University School of Law, incorporates his strong tax and litigation background in virtually every aspect of his practice of law. His areas of concentration are numerous. However, his prime emphasis is on income and estate planning for small, closely-held family businesses. Additionally, he has represented famous authors, professional athletes, public officials, judges, and Fortune 50 CEOs.

## **MONDAY, JUNE 8**

### **LESSONS LEARNED AND BEST PRACTICES FROM THE FRONTLINE**

**Presenter: Carl George, CPA**

A firm's culture and core values are the very foundation of a viable firm legacy. As COO (13 years) and CEO (16 years) of Clifton Gunderson, Carl George knows how important these elements are in building trust and loyalty, increasing morale, and in growing your people and your firm. Carl has enjoyed many successes and has navigated through many trying situations in his career. In this session he will elaborate on the following topics:

- Culture and core values;
- What the firm owes senior partners and what they owe to the firm;
- Dealing with "jerk" partners; and
- How highest value partners should be rewarded.

You will hear openly and candidly, best practices, stories, lessons learned, and do's and don'ts, including successes and failures Carl has encountered on the frontline.

**CARL GEORGE, CPA**  
**Carl George Advisory, LLC**  
**Indianapolis, Indiana**



Carl George has been in the profession since 1971. In fact, he spent his entire career with one public accounting firm – Clifton Gunderson. He started in an office with a volume of \$200,000. After just three years, he was put in charge of the office and was determined to grow the office, both internally and through mergers and acquisitions. Within six years, his office grew to \$4 million, after acquiring the three largest firms in the local market.

Carl was admitted as a partner in 1976, just six years out of college. In 1980, the Clifton Gunderson board asked Carl to leave client practice and become the COO of the firm. His responsibilities included practice management, budgeting, office and firm operations, and mergers/acquisitions. Carl spent 13 years in the role of COO. In 1993, he was selected as his firm's CEO, a position he held until 2009. The company's volume was \$50 million in 2003, and when he stepped down in a planned CEO succession transition in 2009, volume had increased to \$250 million.

In Carl's last three years with the firm as senior executive partner, Carl's primary focuses were mentoring the current management team and assisting them with mergers and acquisitions. In fact, Carl was on the task force that put together the largest non-Big 4 merger with Larson Allen, to form CliftonLarsonAllen. Throughout his career, he has always enjoyed assisting other firms by facilitating retreats for strategic planning, succession planning, or assisting them with their merger/acquisition process.

It is no surprise that Carl wants to continue advising firms after retiring from CliftonLarsonAllen, as he has over 42 years of practice management and M&A experiences to offer. So, Carl formed Carl George Advisory in 2013, with a primary focus of doing just that – advising CPA and law firms in those practice management areas he knows best.

**TUESDAY, JUNE 9**

**THE LOYALTY SWITCH: HOW TO MAKE ANYONE LOYAL TO  
YOU, YOUR ORGANIZATION, OR YOUR CAUSE**

**Presenter: James Kane**

In today's world, where people have more choices than ever before as to where they will spend their time, their money, and their effort, advancement professionals must build virtually unbreakable relationships with alumni, administrators, strategic partners, and sponsors if they hope to remain strong, viable, and effective.

In this fascinating and highly entertaining presentation, James Kane takes his audiences on a journey into the human brain and explains the secret to building and maintaining loyal relationships. Supported by more than 40 years of Harvard University research, James will make the case that human beings have a fundamental need to be loyal and actively seek out the specific clues from others that tell them when they can and should be. When an organization, as well as an individual, is able to understand and demonstrate those loyalty-building behaviors, they can develop relationships that will last a lifetime and result in unwavering and unlimited support.

**JAMES KANE**  
**James T. Kane, LLC**  
**Shavertown, Pennsylvania**



James Kane has been called the world's foremost expert on what makes someone truly loyal – to another person, to an organization, or to a cause.

As a social psychologist and consultant who has helped some of the largest and most well-known organizations in the world, including Apple, Amazon, Google, Marriott International, Disney, and Major League Baseball, Jim reveals the science behind the real human emotion called loyalty, and what anyone can do to build nearly unbreakable relationships with not only clients and customers, but with members, fans, volunteers, vendors, donors, sponsors, and employees, as well.

The author of two upcoming books, *The Loyalty Switch* and *Virtually Loyal*, Jim has worked with every major industry, while advising and training organizations around the world ranging from Global 1000 giants to small, regional companies. As one of the most quoted and profiled authorities on loyalty in the traditional mainstream media, Jim has been profiled in *The New York Times*, *The Wall Street Journal*, *Business Week*, the BBC, and numerous other global and industry publications. He has taught at both Harvard and Penn State Universities and is a frequent guest on CNN, CNBC, and Fox News, which credits him as being “one of the best experts in the business.”

Jim has shared keynote duties at global events with President George W. Bush, Malcolm Gladwell, Hillary Clinton, Jack Welch, Tom Peters, Thomas Friedman, and Warren Buffet, among other leading business, political, and thought leaders.

**CONSCIOUS CAPITALISM: ENABLING HUMAN FLOURISHING**  
**Presenter: David Knoch**

1<sup>st</sup> Global believes that free enterprise provides unbounded opportunity, purpose, and liberty. Businesses that do well while doing good are the backbone of a virtuous and free society. In this session, we will learn about how conscious businesses are evolving our world so that



billions of people can flourish, leading lives infused with passion, purpose, love, and creativity in a world of freedom, harmony, prosperity, and compassion.

**DAVID KNOCH**  
**1<sup>st</sup> Global**  
**Dallas, Texas**



David Knoch serves as president and chief operating officer for 1<sup>st</sup> Global. After joining the company in 2000, David was promoted to his current role in 2008, with a focus on continuing the growth of the company's capabilities for its affiliated CPA firms, as well as for the CPA profession as a whole. In his role, he has direct oversight for 1<sup>st</sup> Global's Wealth Management, Consulting, Investment Management, Research, Marketing Services, Operations, and Technology Services organizations. In his life, David stands for creating better outcomes and fostering in others the courage to do the same.

David is a member of Young President's Organization (YPO), and currently serves on the board of its North Texas Chapter. He is also a member of the Financial Services Institute (FSI) and served on its Board of Directors in 2009. David has a B.A. in Political Science from the University of Massachusetts, Amherst, and is a Certified Investment Management Analyst professional.

**COMPETE TO WIN MORE RECRUITS, CLIENTS, AND TARGET  
ACQUISITIONS**

**Presenter: Christine Nelson**

Christine Nelson is a senior communications and marketing lead with BKR's Strategic Alliance Partner Ingenuity, LLC in St. Paul, Minnesota. She holds a bachelor's degree in mass communications and has worked for more than two decades in business journalism and B2B marketing and growth consulting. Her media strategies have supported client visibility in *Accounting Today*, *CPA Practice Advisor*, *AccountingWEB*, and a range of business and trade publications to reach specific niches. She has also worked with accounting firms around the country on competitive market and brand research, content development, client service enhancements, and reputation building. She has spoken to industry associations, including the Association for Accounting Marketing, among others.

**CHRISTINE NELSON**  
**Ingenuity, LLC**  
**St. Paul, Minnesota**

Accounting firms with name recognition hold prestige in the market, and statistically earn higher



fees. They know how to communicate value. Want to know their secret? It isn't about resources. Highly competitive accounting firms are clear on their target buyers and know how to reach them consistently.

Christine Nelson, a veteran in communications for growing accounting firms nationwide, will teach you when to be high touch and when to go high tech. Connect with recruits, clients, and potential target acquisitions as an impressive competitor. Attendees will take away:

- The two things that turn away any smart recruit;
- A proven high touch/low tech cross-servicing tool; and
- Three questions highly competitive firms ask targets to close the deal.

## **TECHNOLOGY IN 2015: WHAT YOU NEED TO KNOW**

### **Presenter: William Walter**

Bill Walter will cover major advances in technology, as well as:

- Evolution of cloud services, major efficiency;
- Security: One layer of protection is not enough;
- Back to Basics: Educate your users; and
- Understanding and Managing IT Costs.

### **WILLIAM WALTER**

#### **Gross, Mendelsohn & Associates, P.A.**

#### **Baltimore, Maryland**



Bill Walter is the lead network engineer with Gross Mendelsohn's Technology Solutions Group. Showing clients how technology can be worked into their existing processes to improve efficiency is one of Bill's passions when serving clients. He designs, implements, and supports complex computer networks. His experience includes high level planning for internal and external networks, research and selection of hardware and software products, and hands-on installation and configuration of networks.

Bill has a proven track record of success working with clients and vendors at every level of computer system design and implementation. His experience lies in cloud migrations, disaster avoidance, data backup and recovery, data migration, virtual private networks (VPNs), security, email solutions, Internet connectivity, and remote access.

As a regular speaker in the Technology Solutions Group's webinar series, Bill shares his knowledge on topics such as "Effective data backup and disaster recovery solutions,"

“Document management with SharePoint,” “Protect your inbox from spam,” “Windows 7 sneak peek,” and “Power up our Microsoft Small Business Server: top 10 untapped resources.”

As a specialist in data backup and disaster planning and recovery, Bill presented to long-term healthcare professionals at the last two annual meetings of the Healthcare Facilities Association of Maryland. In addition, he has been quoted in the *Baltimore Business Journal* in areas related to disaster planning and recovery.

## **AUTOMATING THE ACCOUNTING PRACTICE**

**Presenter: David Bergstein, CPA**

This session will focus on the digitalization of client accounting services and tax preparation. Automation of these processes has caused CPA firms to change their processes and procedures. Advisory services are growing as firms switch from a compliance service mentality to reliance based mode. This session will present the applications and models that are in place today in most growing firms.

### **DAVID BERGSTEIN, CPA**

**Intuit**

**Margate, Florida**



David Bergstein, CPA, CITP, CGMA, is the business development manager at Intuit's Accountant & Advisory Group. He is a recognized thought leader in technology issues for the accounting profession and specializes in areas such as wireless and digital technology, paperless workflow, cloud technology, use of mobile devices, and security, among others.

David has been in the accounting industry for many years and has been a practicing accountant for over 25 years. While at the IRS, he held various positions: agent, trainer, speaker, and technical chief. He received his CPA and a Master's Degree in taxation from Long Island University's CW Post College. He was an accounting professor at Suffolk County Community College in New York, as well as Broward College in Florida.

He is a member of the FICPA Business Technology Section and is a CPA Ambassador for the AICPA. In the past, he has served on the AICPA Top Tech Technology Team.

David is a well known speaker and trainer in the field of utilization of new technology to improve the efficiency of operations in tax, accounting, practice management, and general operations of the accounting process.

He blogs regularly on technology and new ideas in the global information industry (<http://www.taxmaven.com/>), and has a popular Twitter following (<https://twitter.com/davidbergstein>). He hopes to help CPAs understand the true power of



technology that will allow them to become strategic advisors to their clients and increase their revenues and niche specialties.

In 2012, he received the "Brand Ambassador" award from Enterprise Worldwide.

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