

B K R
INTERNATIONAL

An association of independent
accounting and business advisers

AMERICAS REGION HIGHLIGHTS

2014 EMEA and Asia/Pacific Joint Regional Meeting

**Hilton Istanbul
Istanbul, Turkey
May 2-5, 2014**



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NUMBER OF FIRMS IN THE REGION:

- Canada – 5
- Latin America – 16
- United States – 44

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MEMBERSHIP UPDATE

- We need your help to find new members. While traveling, at CPE, etc.,

THINK BKR!

- ***Refer a Member*** Program: Any member referring a prospective firm that gets approved will receive a **SECOND** free registration to the regional meeting.
- Looking for members in Seattle/Tacoma, Washington; Indianapolis, Indiana; San Antonio, Texas; New England; as well as Calgary and locations throughout South America – just ask the Executive Office if you're unsure!



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2013/14 AMERICAS BOARD

- Jason Tonjes – Chairman (Omaha, Nebraska, USA)
- David Goldner – Vice Chairman/Treasurer (Baltimore, Maryland, USA)
- Howard Rosen – Ex-Officio (St. Louis, Missouri, USA)
- Karen Brenneman (Canton, Ohio, USA)
- James Kraft (San Francisco, California, USA)
- Raymi Mejia (Santo Domingo, Dominican Republic)
- Nancy Nerone (Montreal, Quebec, Canada)
- Johnny Veselka (Houston, Texas, USA)
- Neal Von Stein (Jacksonville, Florida, USA)
- James Krauss – Non-Voting Member (New York, New York, USA)



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AMERICAS REGION DUES

- U.S. – Minimum dues are \$12,040; Maximum dues are \$26,072
- Canada – Dues are 70% of U.S. dues
- Latin America – Worldwide dues + \$1,000 annually



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22 PRACTICE GROUPS

- Currently 22 practice groups, each of which have their own web page and business plans.
- Most practice groups have quarterly niche teleconferences, teleseminars, and/or in-person meetings.



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22 PRACTICE GROUPS

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- A stylized world map in shades of blue is centered in the background. A large, thin red arc curves around the map, starting from the left side, passing over the top, and ending at the bottom right. A small red circle is located at the bottom center of this arc.
- Affordable Housing
 - Business Development
 - Business Valuation
 - Firm Administrators
 - Forensic Accounting/Litigation Support
 - Future Leaders
 - Governmental/Not-for-Profit Accounting and Auditing
 - High Net Worth Families/Estate Planning
 - Human Resources
 - Manufacturing
 - Marketing
 - Medical Practices and Health Care
 - Real Estate and Construction
 - Retirement Plan Auditors
 - Retirement Plan Services
 - SALT
 - SEC/PCAOB
 - Standards/Quality Control
 - Tax (Americas)
 - Tax (Canadian)
 - Tax (U.S.)
 - Technology (Internal)



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MANAGING PARTNER ROUNDTABLES

BKR's Managing Partners meet annually in Las Vegas before the Americas Board Meeting to discuss a variety of practice management issues. Firms are grouped by size and come together for lunch and dinner.



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STRATEGIC ALLIANCES

- **Currently, the Americas Region has the following Strategic Alliances. We invite 4-5 to sponsor at the regional meeting (at \$4,000 each) to help defray costs.**
 - **AICPA** - Offers members a 17% discount for all AICPA conferences.
 - **Alliantgroup** - Provides Research and Development Tax services.
 - **Avalara** - Cloud-based Sales, Use , and Value Added Tax resources.
 - **Becker Professional Education** - Discounts on training for CPA review and CPE programs.
 - **CCH** - Discounts are available to members on all library publications, virtual seminars, and software.
 - **1st Global, Inc.** - Financial services - 1st Global provides independent or full service support for a complete range of financial services.



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STRATEGIC ALLIANCES

- **First Research Industry Profiles** – First Research provides industry profiles for more than 900 industry segments. Many U.S. firms are requiring the profiles be reviewed and maintained on file for all attest engagements. Most firms review the profiles before meeting with a client in an unfamiliar industry.
- **Harvest Investments** - Provides securities valuations for financial reporting.
- **Ingenuity Marketing Group** - Assists firms with business development, marketing strategies, and client retention programs.
- **LEXBRIDGE M&A** - Offers comprehensive global investment banking services for mergers and acquisitions, including corporate financing.



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STRATEGIC ALLIANCES

- **ProfitCents** - Provides firms and their clients with a benchmarking analysis of clients' financial statements, which enhances analytical reviews, training processes, and marketing efforts.
- **Scarpello Consulting** - Provides discounted cost segregation services to all members.
- **Surgent McCoy** - Discounts on hundreds of live webinars and self-study courses.
- **Thomson Reuters, Tax & Accounting** - Discounts on various products including Checkpoint, GoFileRoom, GoSystemTax, and CS Professional Suite.
- **Travelex Global Business Payments** - An on-line platform for foreign exchange and business payments.



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SERVICES

- Client newsletters and brochures.
- Resources and best practices for industry groups are shared on the website.
- Links to First Research (industry profiles) and ProfitCents (client benchmarking reports).
- Weekly informational E-Update.



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SERVICES

- Annual Law Firm Statistics posted to the website.
- Subsidize attendance for one member from each U.S. and Canadian firm to the regional conference.
- Subsidize attendance of Americas Tax Committee Chair to another region's conference.
- Promote practice groups by providing funding and presenting their initiatives at the regional conference.



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BKR LEADERSHIP INSTITUTE

- 20 attendees are enrolled in BKR's 2013-2014 Leadership Institute. The last session will be held in New York from May 7-9.
- The program consistently gets outstanding ratings by the participants (averaging 4.8 out of 5).
- Reunion Programs for all Institute graduates are held annually in the summer. This year's program will be held on July 31 & August 1 in Chicago.



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BKR LEADERSHIP INSTITUTE

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**ALL REGIONS ARE ENCOURAGED TO
SEND PARTICIPANTS TO BKR'S
LEADERSHIP INSTITUTE!**

Contact the Executive Office for details!

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Americas Regional Meeting 2014

The Ritz Carlton Hotel
May 30 – June 3, 2014
Denver, Colorado, USA

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Website

BKR.COM

