

# BKR

INTERNATIONAL

## AMERICAS REGIONAL MEETING The Brown Hotel Louisville, Kentucky, USA

June 3-6, 2017

### ***"Racing to Excellence"***

#### **PROGRAM AGENDA**

#### **SATURDAY, JUNE 3**

6:45 a.m. – 11:30 a.m.	Easy Runners Outrunning Autism 5K Run	Lien Le (Houston)	Meet in First Floor Lobby
8:30 a.m. – 4:30 p.m.	Governmental/Not-for-Profit Accounting and Auditing Practice Group Meeting	Melisa Galasso Galasso Learning Solutions, LLC Charlotte, North Carolina Jeff Thomason (Memphis)	Secretariat B (First Floor)
9:00 a.m. – 4:00 p.m.	Americas Regional Board Meeting <i>(Board Members Only)</i>	Dave Goldner (Baltimore)	Gallery Boardroom (16 <sup>th</sup> Floor)
1:00 p.m. – 5:00 p.m.	Latin American Firms' Meeting	Manuel Rangel, Jr.	Broadway A (Third Floor)
4:00 p.m.	Meeting Registration and Hospitality Suite		J. Graham Brown (Third Floor)
6:45 p.m. – 10:00 p.m.	Welcome Dinner at the Marketplace Restaurant		Meet in First Floor Lobby

#### **SUNDAY, JUNE 4**

7:00 a.m. – 9:00 a.m.	Breakfast for All		Bluegrass Room (Second Floor)
7:00 a.m. – 4:00 p.m.	Golf Tournament at Champions Pointe Golf Club		Meet in First Floor Lobby
10:30 a.m. – 4:00 p.m.	Louisville City Tour, Muhammad Ali Center, Evan Williams Bourbon Experience, and Lunch		Meet in First Floor Lobby

4:00 p.m.	Hospitality Suite Opens		J. Graham Brown (Third Floor)
7:00 p.m. – 10:00 p.m.	“Taste of Louisville” Buffet Dinner		Crystal Ballroom (Third Floor)

## MONDAY, JUNE 5

7:00 a.m. – 9:00 a.m.	Breakfast for All		Bluegrass Room (Second Floor)
8:30 a.m. – 8:40 a.m.	Welcome to Louisville	Chris Ward (Louisville)	Crystal Ballroom (Third Floor)
8:40 a.m. – 8:50 a.m.	Report of the Americas’ Chair • Vote on nominations to the Americas Board • Vote on BKR financial statements and budget	Dave Goldner (Baltimore)	
8:50 a.m. – 9:00 a.m.	Report of the Worldwide Chair	Jacqueline Wolfovski (Paris)	
9:00 a.m. – 10:15 a.m.	Partner Accountability and Unity: Linking Firm Strategy to Compensation	Gary Adamson, CPA Adamson Advisory Centerville, Indiana	
9:45 a.m. – 4:00 p.m.	*Companion Tour Departure (See below)		
10:15 a.m. – 10:30 a.m.	Coffee Break		Foyer
10:30 a.m. – 12:10 p.m.	Highlights of the 2017 Member Firm Statistical Analysis	Howard Rosen (Phoenix)	Crystal Ballroom (Third Floor)
12:10 p.m. – 1:00 p.m.	Lunch for Members		Bluegrass Room (Second Floor)
1:00 p.m. – 2:40 p.m.	Breakout Groups by Topic See attached breakout lists <i>(Each session presented twice)</i>		
	• Drilling Down into the 2017 Statistics	Howard Rosen (Phoenix)	Broadway A (Third Floor)
	• The Pros and Cons of Outsourcing	Cathy Hwang (San Francisco) Clarence Kehoe (New York)	Broadway C (Third Floor)
	• Partner Accountability	Gary Adamson, CPA	Secretariat B (First Floor)

	• The New Normal: Winning Clients with Social Selling	Delene Taylor (Louisville) Christine Nelson Ingenuity Marketing Group, LLC St. Paul, Minnesota	Broadway B (Third Floor)
2:40 p.m. – 2:55 p.m.	Coffee Break		Foyer
2:55 p.m. – 4:35 p.m.	Breakout Groups by Topic (Repeat of sessions above)		
4:00 p.m.	Hospitality Suite Opens		J. Graham Brown (Third Floor)
4:45 p.m. – 5:15 p.m.	Orientation for New/Guest Firms	Dave Goldner (Baltimore) Karen Brenneman (Canton) Kevin Martin, Jr. (Boston) Jacqueline Wolfovski (Paris) Maureen Schwartz (Executive Office)	Broadway C
6:00 p.m. – 12:00 a.m.	Kentucky Derby Party at Churchill Downs		Meet in First Floor Lobby
*9:45 a.m. – 4:00 p.m.	Companion Tour: Louisville Victorian Homes, Hat Making Activity, and Lunch		Meet in First Floor Lobby

## **TUESDAY, JUNE 6**

7:00 a.m. – 9:00 a.m.	Breakfast for All		Bluegrass Room (Second Floor)
8:30 a.m. – 9:00 a.m.	Panel Discussion: Regional Updates	Dave Goldner, Moderator Arcangelo Agogliati Jason Croston Jacqueline Wolfovski	Crystal Ballroom (Third Floor)
9:00 a.m. – 9:15 a.m.	Practice Group Updates: • Future Leaders • Medical Practices and Health Care	Lisa Matuszny (Cleveland) Karen Brenneman (Canton)	
9:15 a.m. – 10:15 a.m.	That Michelangelo Moment: Sustained Excellence Amid Chaos and Uncertainty	Paul Voss, PhD Ethikos Mableton, Georgia	
10:15 a.m. – 10:30 a.m.	Coffee Break		Foyer
10:30 a.m. – 12:10 p.m.	Using Data to Drive Growth Strategy and ROI	Katie Tolin CPA Growth Guides Canton, Ohio	

12:10 p.m. – 1:00 p.m.	Lunch for Members		Bluegrass Room (Second Floor)
1:00 p.m. – 2:00 p.m.	Update on Technology, Cyber Security, and Gadgets: Sometimes What You Don't Know Can Hurt You!	Bob Daugherty (Louisville)	Crystal Ballroom (Third Floor)
2:00 p.m. – 3:00 p.m.	Artificial Intelligence: The Future is Now	Roman Yampolskiy, PhD University of Louisville Louisville, Kentucky	
3:00 p.m. – 3:15 p.m.	Coffee Break		Foyer
3:15 p.m. – 4:05 p.m.	Panel Discussion on Staff Retention	Delene Taylor, Moderator DMLO iGen Committee	
4:00 p.m.	Hospitality Suite Opens		J. Graham Brown (Third Floor)
4:05 p.m. – 4:15 p.m.	Closing Remarks and iPad Drawing <b>(You have to be present to win!)</b>	Dave Goldner (Baltimore)	Crystal Ballroom (Third Floor)