



**AMERICAS REGIONAL MEETING
The Four Seasons Hotel
Toronto, Ontario, Canada**

May 20-24, 2016

PROGRAM AGENDA

FRIDAY, MAY 20

8:30 a.m. – 4:30 p.m.	Governmental/Not-for-Profit Accounting and Auditing Practice Group Meeting	Diane Edelstein Maher Duessel CPAs Pittsburgh, Pennsylvania Jeff Thomason (Memphis)	Westwind (Third Floor)
8:30 a.m. – 5:30 p.m.	Golf at the Devil's Pulpit Golf Course		Meet in Lobby
4:00 p.m.	Meeting Registration and Hospitality Suite		Jasper (Third Floor)

SATURDAY, MAY 21 (Simultaneous Sessions)

7:00 a.m. – 9:00 a.m.	Breakfast for All		Vinci (Sixth Floor)
7:45 a.m. – 1:05 p.m.	Accounting and Auditing Update	Wayne Kerr, CPA AuditWatch Salt Lake City, Utah	Aria East (Third Floor)
7:45 a.m. – 1:05 p.m.	Federal Tax Update	Ed Zollars, CPA Thomas, Zollars & Lynch, Ltd. Phoenix, Arizona	Aria West (Third Floor)
9:00 a.m. – 5:00 p.m.	Americas Regional Board Meeting (<i>Board Members Only</i>)	Dave Goldner (Baltimore)	Westwind (Third Floor)
4:00 p.m.	Hospitality Suite Opens		Jasper (Third Floor)
7:00 p.m. – 10:00 p.m.	“Taste of Canada” Buffet Dinner		Vinci (Sixth Floor)

SUNDAY, MAY 22

7:00 a.m. – 9:00 a.m.	Breakfast for All		Vinci (Sixth Floor)
8:45 a.m. – 6:00 p.m.	Choice of Tours: • Niagara Falls and Lunch		Meet in Lobby
9:45 a.m. – 3:00 p.m.	• Discover Toronto City Tour and Lunch		
3:00 p.m. – 5:00 p.m.	Canadian Tax Practice Group Meeting	Don Scott (Ottawa)	Tamarack (Third Floor)
4:00 p.m.	Hospitality Suite Opens		Jasper (Third Floor)
5:00 p.m. – 6:00 p.m.	International Tax Reception		Northland (Third Floor)
6:45 p.m. – 10:00 p.m.	Casual Dinner at Sassafras Restaurant		Meet in Lobby

MONDAY, MAY 23

7:00 a.m. – 9:00 a.m.	Breakfast for All		Vinci (Sixth Floor)
8:30 a.m. – 8:40 a.m.	Welcome to Toronto	Brad Waese (Toronto)	Aria West (Third Floor)
8:40 a.m. – 8:50 a.m.	Report of the Chairman • 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 Chairman	Howard Rosen (Phoenix)	
9:00 a.m. – 10:15 a.m.	Strategies to Truly Engage and Retain Your People	Jennifer Wilson ConvergenceCoaching, LLC Omaha, Nebraska	
8:45 a.m. – 3:00 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 2016 Member Firm Statistical Analysis	Carl George, CPA Carl George Advisory LLC Indianapolis, Indiana	Aria West (Third Floor)

12:10 p.m. – 1:00 p.m.	Lunch for Members		Aria East (Third Floor)
1:00 p.m. – 2:40 p.m.	Breakout Groups by Topic:		
	• Assessing the Client Experience for Challenges and Opportunities	Chris Nelson Wendy Nemitz Ingenuity Marketing Group, LLC St. Paul, Minnesota	Westwind (Third Floor)
	• Corporate Finance/M&A	Stephan May (Ottawa)	Tamarack (Third Floor)
	• Drilling Down Into the 2016 Statistics	Carl George, CPA	Laurentian 1-2 (Sixth Floor)
	• Moving Away from the Time and Place Paradigm	Jennifer Wilson	Northland (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		Jasper (Third Floor)
7:00 p.m. – 12:00 a.m.	Gala Dinner Dance		Vinci (Sixth Floor)
*8:45 a.m. – 3:00 p.m.	Companion Tour: Royal Ontario and Bata Shoe Museums and Lunch		Meet in Lobby

TUESDAY, MAY 24

7:00 a.m. – 9:00 a.m.	Breakfast for All		Vinci (Sixth Floor)
8:30 a.m. – 9:30 a.m.	Professional Updates	Nick Cheung, CPA, CA CPA Canada Toronto, Ontario, Canada Mark Koziel, CPA, CGMA AICPA New York, New York	Aria West (Third Floor)
9:30 a.m. – 10:00 a.m.	Around the World in 30 Minutes: Regional Updates Americas Asia/Pac EMEA	Dave Goldner (Baltimore) Tim Partridge (Bunbury) Nilesh Shah (London)	

10:00 a.m. – 10:15 a.m.	Practice Group Updates: • Corporate Finance/M&A • International Tax	Stephan May (Ottawa) Ken Laks (Long Island)	Aria West (Third Floor)
10:15 a.m. – 10:30 a.m.	Coffee Break		Foyer
10:30 a.m. – 12:00 p.m.	Network Like a Millionaire and Never Forget a Name	Bob Gray Memory Edge Corporation Toronto, Ontario, Canada	
12:00 p.m. – 1:00 p.m.	Lunch for Members		Aria East (Third Floor)
1:00 p.m. – 2:30 p.m.	Do They Deserve to Work With You? Getting and Keeping the Best Clients	Wendy Nemitz	
2:30 p.m. – 3:20 p.m.	Professional Liability Claims Statistics and Key Loss Drivers	Christopher Brammer Stan Sterna, JD Aon Affinity Hatboro, Pennsylvania	
3:20 p.m. – 3:35 p.m.	Coffee Break		Foyer
3:35 p.m. – 4:30 p.m.	Technology Update and Predictions for 2016	Dave Bergstein, CPA, CGMA Intuit Mountain View, California	
4:00 p.m.	Hospitality Suite Opens		Jasper (Third Floor)
4:30 p.m. – 4:40 p.m.	Closing Remarks and iPad Drawing (You have to be present to win!)	Dave Goldner (Baltimore)	Aria West (Third Floor)

WEDNESDAY, MAY 25

9:00 a.m. – 5:00 p.m.	Worldwide Board Meeting (Board members only)	Howard Rosen (Phoenix)	Jasper (Third Floor)
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