BKR
INTERNATIONAL

AMERICAS REGIONAL MEETING

The Four Seasons Hotel
Toronto, Ontario, Canada
May 20-24, 2016

Toronto is one of the most cosmopolitan cities in the world! Known for its openness, warmth, energy, and style, it is the most visited city in Canada. Enriched by the fusion of traditions of the more than 100 cultures found there, Toronto's diversity is apparent everywhere: in its culinary landscape of over 7,000 restaurants, its international art scene and one-of-a-kind shops, and its passion for sports, especially ice hockey. Whether you'll enjoy soaring up to the top of CN Tower, one of the tallest free-standing structures in the world, or biking around the miles of pristine lakefront, Toronto will exceed your expectations on every level!

HOTEL

Our meeting will be held at the elegant and sophisticated **Four Seasons Hotel,** consistently ranked the #1 hotel in Toronto. The Four Seasons is just steps away from trendy boutiques, gourmet restaurants, world-class museums, and a myriad of other historic and cultural attractions.

BKR has secured a special deluxe room rate of **CAD$299** (approximately USD$210) per night for single or double occupancy, plus the current tax of 13%. BKR members will have complimentary guest room internet.

Room reservations must be made by **Thursday, April 21,** 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 **1-416-964-0411** and reference the BKR International Americas Regional 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. *Golf on Friday is 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 **Thursday, April 21**.

In the event you need to cancel your meeting registration, you must notify the Executive Office by **Wednesday, May 11,** 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

Pearson International Airport is about 30-45 minutes from The Four Seasons Hotel. BKR has secured the following airline discount:

Air Canada: The discount will be applied to the fare at the time of booking at www.aircanada.com. The promotion code is: **UPU74X21**.

As always, be sure to book your airline

ticket at least ***30 days prior to travel*** to secure the lowest fares.

GROUND TRANSPORTATION

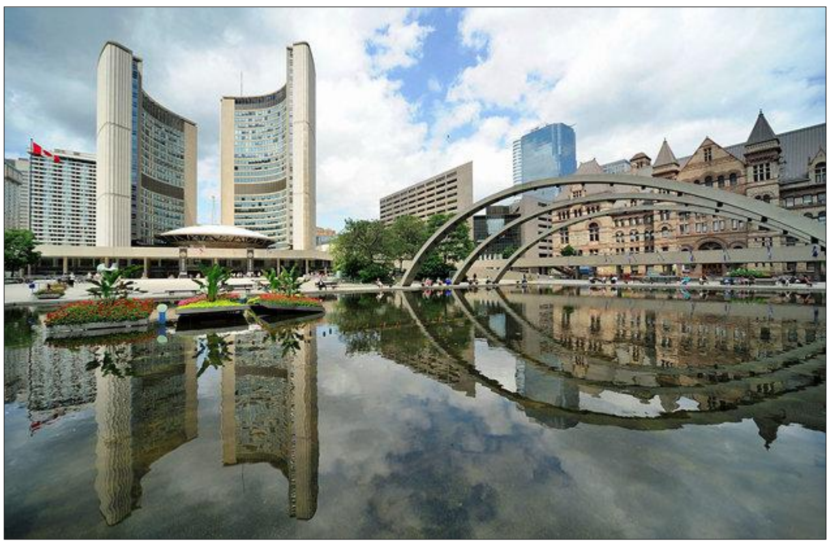
Taxis will charge an approximate rate of $50CAD and can be found outside the baggage claim areas.

PARKING

The Four Seasons offers valet parking for $60CAD per night.

HOSPITALITY SUITE

Catch up with friends and make new ones over refreshments and light snacks in the Jasper Room, located on the third floor. Our Hospitality Suite will open each afternoon at 4:00 p.m., from Friday, May 20, through Tuesday, May 24, 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 20 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 May 20 will earn approximately 7½ additional CPE credits.

LEARNING OBJECTIVES

- Learn to utilize tools to develop an organization filled with motivated and inspired team members;
- Understand professional liability claims, loss drivers, choice of counsel, and litigation management;
- Utilize marketing and communications techniques to improve recruiting, client retention, and business development;
- Develop criteria for an ideal target prospect;
- Learn how to assess client experiences to overcome challenges and gain opportunities;
- Integrate technology advancements in the workplace; and
- Gain an understanding of significant new legislation, regulations, rulings, and cases that impact federal taxes.

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, MAY 20

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. Guest speaker Diane Edelstein, partner at Maher, Duessel CPAs, will present a GASB/Not-for-Profit Update. Detailed information will be e-mailed separately. All members with a practice in this niche (or who are considering one) are invited to attend.

SATURDAY, MAY 21

Saturday's program features concurrent updates on both audit and tax, from 7:45 a.m. - 1:05 p.m. Each workshop is designed to help keep your firm on the cutting edge of technical developments in the profession, and is eligible for 6 hours of CPE credit.

Accounting and Auditing Update – Wayne Kerr, CPA, senior consultant for Thomson Reuters AuditWatch, will address the latest A&A issues and updates.

Federal Tax Update – Edward Zollars, CPA, will present the 2016 federal tax update, with emphasis on the tax legislation passed in 2015 and 2016 that impact you and your client.

MONDAY, MAY 23

After our official "Welcome to Toronto" by our host, SF Managing Partner Bradley Waese, BKR's Americas Regional Chairman David Goldner (Baltimore) will present his annual report, calling for a vote on the slate of board nominees and BKR's financial statements and budget. Following, Jennifer Wilson, a nationally renowned leadership and marketing consultant and one of Accounting Today's 100 Most Influential People in Accounting, will present "Strategies to

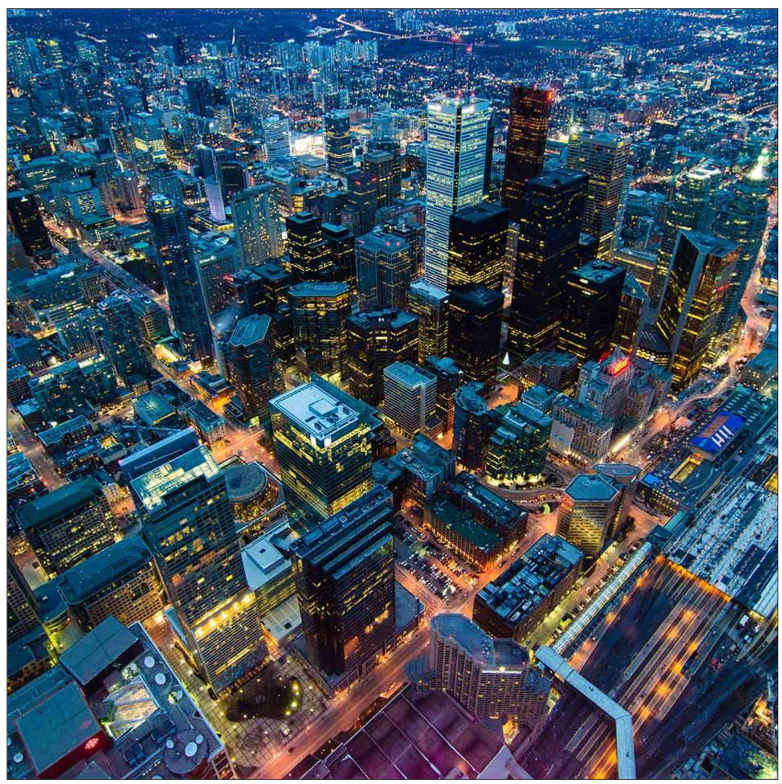
Truly Engage and Retain Your People." Finishing up the morning session, Carl George returns by popular demand to discuss the results of BKR's ***2016 Member Firm Statistical Analysis***.

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

- Assessing the Client Experience for Challenges and Opportunities;
- Corporate Finance/M&A;
- Drilling Down Into the 2016 Statistics; and
- Moving Away from the Time and Place Paradigm.

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

TUESDAY, MAY 24



Today, the morning kicks off with professional updates from two of North America's leading accounting bodies – Nicholas Cheung, vice president, member services at CPA Canada, and Mark Koziel, vice president – firm services & global alliances at the American Institute of CPAs.

Panels will follow on the latest developments within our regions and practice group initiatives. The morning's keynote speaker, Bob Gray, will share his "memory trick" to enable even the most forgetful among us to "Network Like a Millionaire and Never Forget a Name."

After lunch, Ingenuity Marketing Group's Wendy Nemitz will share insights on gaining and retaining clients with her presentation, "Do They Deserve to Work With You? Getting and Keeping the Best Clients." Following Wendy, Christopher Brammer and Stanley Sterna from Aon Affinity will present the latest professional liability claims statistics and how to best protect yourself and your firm.

Tuesday will wrap up with a technology update and predictions for 2016 by Consultant David Bergstein, CPA, with Intuit. But it's not over yet…be sure to stay until the very end to be eligible to win the latest iPad in BKR's annual raffle.

SOCIAL AGENDA HIGHLIGHTS

FRIDAY, MAY 20

Golf at the Devil's Pulpit Golf Course

Attention golfers: Get to Toronto on Thursday night so that you can enjoy a day of great golf at the Devil's Pulpit Golf Course on Friday, May 20. Lunch will be provided. **Note: Space is limited. Register early to guarantee a spot! First come, first served.**

SATURDAY, MAY 21

Breakfast

A full hot and cold breakfast buffet will be available each morning from 7:00 a.m. - 9:00 a.m. in the Vinci Ballroom, located on the sixth floor.

"A Taste of Canada" Buffet Dinner at the Four Seasons Hotel

Join your colleagues for BKR's welcome reception and buffet dinner to discover the true essence of Canadian cuisine. Your taste buds will surely be tantalized with a culinary exploration highlighting the unique specialties of the Canadian provinces, including Ontario, Alberta, Nova Scotia, Quebec, and the Prince Edward Islands. Enjoy a journey of many flavors from local Canadian produce to fresh East coast seafood...and, of course, Canada's famous brews!

SUNDAY, MAY 22 (OPTIONAL CHOICE OF TOURS, BOTH WITH LUNCH)

#1. Discover Toronto Tour and Lunch at CN Tower – 10:00 a.m. - 3:00 p.m.

This morning you'll explore the diversity of Toronto on a guided bus tour of famous Toronto districts and landmarks: Kensington Market, one of the most famous and lively neighborhoods in the city; the Art Gallery of Toronto; the New City Hall; Yonge/Dundas Square; the Distillery District; the Hockey Hall of Fame – proud home of the Stanley Cup; and the Rogers Centre, famous for its fully retractable roof.

After the tour, enjoy a unique Canadian lunch experience at the 360 Restaurant atop the iconic CN Tower, one of the "Seven Wonders of the Modern World." Authentic Canadian favorites will be served while you enjoy the outstanding revolving view of Toronto from more than 350 meters above.

OR

#2. Niagara Falls Tour and Lunch at Elements on the Falls – 9:00 a.m. - 6:00 p.m.

This full day excursion will bring you to a truly Canadian jewel, Niagara Falls, one of the "Seven Wonders of the Natural World." Six million cubic feet (168,000 cubic meters) of water crashes over the Horseshoe Falls Crestline every minute!

First, you'll board a luxury catamaran to experience, up close and personal, the awesome power, thundering roar, and amazing mist emanating from the falls. Your "cat" will then take you on an elite tour of the Horseshoe Falls, American Falls, and Bridal Veil Falls that together make up Niagara Falls. After this fabulous boat ride, you will proceed to Elements on the Falls Restaurant to enjoy a delicious lunch while overlooking this natural wonder.

On the way back to the hotel, we'll make a stop at the picturesque, 19th century town of Niagara-on-the Lake. Sir Winston Churchill described this route as the "prettiest Sunday-afternoon drive in the world." It is one of the oldest settlements in Ontario, and has been beautifully restored to depict its heritage. We'll stop for a photo op where you'll have an opportunity to browse through the craft stores, specialty shops, and boutiques that can be found throughout the town.

Casual Dinner at Sassafraz Restaurant – 7:00 p.m. - 10:00 p.m.

After a long day of touring and exploring, you'll rejoin your BKR colleagues for dinner at Sassafraz Restaurant, for a private BKR-only event. Located just a block from our hotel, Sassafraz is set in an array of Victorian row houses in the heart of historic Yorkville. This "little yellow house" has "seen it all" - from the early hippie movement of the 60s to the lack of movement that comes from too much Bordeaux. At Sassafraz you'll enjoy an evening of exceptional French-Canadian inspired cuisine. Bon Appétit!

MONDAY, MAY 23

Companion Tour: Royal Ontario and Bata Shoe Museums and Lunch – 9:00 a.m. - 3:00 p.m.

Today, companions will discover the Royal Ontario Museum, known to locals as "the ROM." This museum of art, world culture, and natural history is the largest museum in Canada, with eight themed galleries ranging from Ancient Cultures and Earth and Space to Global Textiles and Fashion.

On a one-hour guided tour, companions will discover how the earth and its cultures evolved, and how the decisions and changes made today will shape the world we'll live in tomorrow.

Then it's off to lunch! Companions will indulge in an Italian dining experience at the newly renovated Dimmi Trattoria, one of Yorkville's top restaurants, where they may encounter such regular patrons as Eva Longoria or Antonio Banderas.

In the afternoon, companions are sure to enjoy North America's charming and surprising Bata Shoe Museum. The museum collects, researches, preserves, and exhibits footwear from around the world. The collection contains over 13,500 items from throughout history to the present. It is the only museum in North America dedicated solely to the history of footwear and surely a unique experience for every woman (and some men, too!).

After the shoe museum visit, companions will likely be inspired to shop. If time permits, their guide will escort them through the Yorkville district, pointing out favorite designer boutiques and restaurants.

"White Nights" Gala Dinner Dance at the Four Seasons Hotel

Tonight, we'll celebrate the coming summer solstice at BKR's "White Nights" gala dinner dance right at our hotel. No need to trek up to the Arctic Circle! The Vinci Ballroom's light and bright décor and endless wall of windows will set the stage for our own "Land of the Midnight Sun." We know the legendary Four Seasons cuisine, wine, and service, with entertainment by one of Toronto's top bands, will insure that May 23 will be a "White Night" you will always remember! **Please help us create the perfect ambiance and dress in white.**

ENTRY REQUIREMENTS

A visa may be required to enter Canada. Click on the following link to find out what you need to visit Canada as a tourist:

http://www.cic.gc.ca/english/visit

TIME ZONE

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

WEATHER AND DRESS

The weather in May should be mostly sunny, with average highs of 65º F (18º C) and lows of 48º F (9º C). Dress for all meetings and social events is business casual **(white clothing is the suggested color code for Monday's dinner)**, with the exception of **The Niagara Falls Tour**, where comfortable attire and a rain jacket are recommended.

ASSISTANCE

Your Executive Office Team, together with the partners and staff of SF Partnership, look forward to welcoming you to Toronto. 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 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
Christopher Brammer: www.aon.com
Nicholas Cheung: www.cpacanada.ca
Carl George: www.carlgeorgeadvisory.com
Bob Gray: www.memoryedge.com
Wayne Kerr: www.auditwatch.com
Mark Koziel: www.aicpa.org
Christine Nelson: www.ingenuitymarketing.com
Wendy Nemitz: www.ingenuitymarketing.com
Stanley Sterna: www.aon.com
Jennifer Wilson: www.convergencecoaching.com
Edward Zollars: www.npcpe.net

Toronto: mtm.seetorontonow.com, www.city.toronto.on.ca
The Four Seasons Hotel: www.fourseasons.com/toronto
The CN Tower: www.cntower.ca
Niagara Falls: www.niagarafallstourism.com

BUSINESS PROGRAM OUTLINES/BIOGRAPHIES

SATURDAY, MAY 21

ACCOUNTING AND AUDITING UPDATE
Presenter: Wayne Kerr, CPA

This session will cover:

- New ASUs Issued in 2015 and 2016;
- New Exposure Drafts from FASB;
- Standards in the Simplification Initiative;
- Revenue Recognition Standards;
- Lease Standards;
- Fraud Update;
- Common Issues Found in Peer Reviews; and
- Audit Quality and Efficiency.

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

WAYNE KERR, CPA
AuditWatch
Salt Lake City, Utah

Wayne Kerr is a senior consultant for Thomson Reuters and a member of the professional team for AuditWatch. His duties include developing new CPE products, managing course content, teaching A&A update courses, and consulting with firms throughout the country. Wayne specializes in audit methodology and audit productivity consulting -- working with firms to improve audit quality and efficiency; develop, refine and implement audit methodologies; and reengineer audit strategies and testing approaches.

Before joining Thomson Reuters, Wayne worked for Grant Thornton, serving audit clients in various industries. He also had quality assurance duties and training responsibilities for his business unit.

Wayne is a member of the American Institute of Certified Public Accountants and holds BS and MA degrees from Brigham Young University.

FEDERAL TAX UPDATE
Presenter: Edward Zollars, CPA

This session will include a discussion of:

- Key issues in tax legislation passed in 2015 and 2016;
- Developments related to penalties imposed both on taxpayers and tax professionals;
- Updates on IRS's view on business's responsibilities related to tax information security of their customers, vendors, and employees;
- Cases dealing with the IRS's continuing attacks on passive activity issues, including real estate professionals;
- Up-to-the minute updates on new regulations and rulings; and
- Update on current court cases.

EDWARD ZOLLARS, CPA
Thomas, Zollars & Lynch, Ltd.
Phoenix, Arizona

Ed Zollars is a partner with the firm of Thomas, Zollars & Lynch, Ltd. He has been in practice for over 25 years, specializing in tax issues for closely held businesses and individuals.

Ed has been professionally involved with both tax and technology issues, combining the two disciplines in starting the first tax podcast, Ed Zollars Tax Update, which is produced weekly. He has been a member of the AICPA Tax Division Committees dealing with tax and technology issues, and was the tax section's representative on three occasions to the AICPA's Top Ten Technologies project. Ed is also a member of the Phoenix Tax Workshop's Advisory Committee, and currently serves on the Tax Legislation Liaison Committee for the Arizona Society of CPAs. Ed was selected as a Life Member by the Arizona Society of CPAs in May 2010.

Along with writing, editing, and presenting courses for Nichols Patrick CPE, Inc. for over the past 10 years, Ed has written articles published in *Practical Tax Strategies* and the *Tax Advisor*. He has been a frequent contributor to a number of professional tax discussion groups, and served as systems operator on the AICPA's Accountants Forum in the mid-1990s.

Ed has regularly spoken on tax and technology topics since 1996 at conferences sponsored by the AICPA and a number of state societies of CPAs.

MONDAY, MAY 23

STRATEGIES TO TRULY ENGAGE AND RETAIN YOUR PEOPLE
Presenter: Jennifer Wilson

The labor market is tight and your best and brightest are in high demand! Are you doing all that you can to motivate your talent in ways that are meaningful to them? Firms that provide motivational and engaging environments will win in the recruiting and retention race. This session will enable you to:

- Understand the top professional motivators and ways to learn which are the most important to your people;
- Learn quick and effective communication techniques to stay close to your top talent; and
- Utilize methods for engaging and empowering your people to achieve the things most important to them – and your firm.

You will leave this session with tools to develop an organization filled with motivated and inspired team members.

JENNIFER WILSON
ConvergenceCoaching, LLC
Omaha, Nebraska

Jennifer Wilson is a co-founder and partner of ConvergenceCoaching, LLC, a national leadership and marketing consulting firm dedicated to helping leaders achieve success by helping them develop and implement leadership, succession, marketing, and training and development plans. Jennifer's ultimate goal is to make a transformational difference in the lives of her clients and in their businesses.

Named as one of *Accounting Today's* 100 Most Influential People in Accounting, *INSIDE Public Accounting's* Top 10 Most Recommended Consultants, and *CPA Practice Advisor's* Top 25 Thought Leaders and Most Powerful Women in Accounting, Jennifer has worked in both the public accounting and IT development sectors before cofounding ConvergenceCoaching, LLC. As a partner for BDO USA, Jennifer ran the National Financial Solutions Group practice with nearly 100 consultants providing financial systems selection, implementation, and support services to clients.

Jennifer is a member of the New Horizons Group, CPA Consultants' Alliance, and Accountants' Global Advisory Panel, all forums for leading consultants to the accounting profession. She is a regular guest columnist and blogger for *Accounting Today*, *Accounting Tomorrow*, and *AICPA CPA Insider* with many recently published articles on leadership, partner programs, people management, and business development. She is a nationally recognized speaker, teacher, and facilitator delivering leadership and marketing programs to accounting and technology associations, state societies, and firms.

HIGHLIGHTS OF THE 2016 MEMBER STATISTICAL ANALYSIS
Presenter: Carl George, CPA

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 his last three years with the firm as senior executive partner, Carl's primary focuses were in 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, MAY 24

PROFESSIONAL ISSUES UPDATE
Presenters: Nicholas Cheung, CPA
Mark Koziel, CPA, CGMA

In this session, Nick will discuss the following topics:

- Unifying the Canadian Accounting Profession;
- Improving the Financial Literacy of Canadians; and
- CPA Canada's International Strategy.

Following, Mark Koziel will discuss the global and domestic trends affecting the accounting profession today. He will focus on both technical and practice management issues facing many firms today in the U.S. and around the globe. Topics will include:

- 8 Global Trends Affecting the Profession;
- Regulatory and Legislative Landscape in the U.S. and Abroad;
- Audit Quality;
- AICPA's Global Strategy;
- Firm Practice Management Issues and How to Address Them;
- New and Emerging Services for Accounting Firms; and
- Promoting the U.S. CPA Brand.

NICHOLAS CHEUNG, CPA
CPA Canada
Toronto, Ontario, Canada

Nick Cheung is the vice president of member services and publisher of *CPA Magazine* at CPA Canada. He is responsible for creating value for members by developing and providing practical, relevant, and innovative publications, products, and services. He oversees the strategy for and operations of *CPA Magazine*, the largest B2B magazine in Canada with a circulation of over 200,000. As CPA Canada's chief privacy officer, Nick is also responsible for the management and protection of member information.

Nick has served as CPA Canada's financial literacy spokesperson and has appeared on BNN, in the *National Post*, and *The Globe and Mail*. He was a contributor to the organization's 2013 award-winning book, *A Canadian's Guide to Money-Smart Living*. Nick joined the Canadian Institute of Chartered Accountants (CICA) in 2007. He was the co-author of the Privacy Maturity Model (PMM), developed in conjunction with the American Institute of Certified Public Accountants in 2011, and was the contributing author of the CICA legacy publication, *Canadian Privacy and Data Security Toolkit for Small and Medium Enterprises* in 2009.

Nick has also served on the inaugural Canadian advisory board of the International Association of Privacy Professionals.

MARK KOZIEL, CPA, CGMA
American Institute of Certified Public Accountants (AICPA)
New York, New York

Mark Koziel is vice president of Firm Services & Global Alliances at the AICPA. He oversees the development, ongoing improvement, and delivery of services to members in PCPS/Firm Practice Management, as well as international relations with various CPA related groups. He frequently speaks on CPA issues around the country.

Prior to joining the AICPA, Mark Koziel served three years as director of Media Planning for a political consulting firm after finishing his 12-year public accounting career in a variety of accounting, auditing, and consulting roles at a large local accounting firm in Buffalo, New York.

Mark was an active member of the Buffalo Chapter of the New York State Society of CPAs. Mark was one of the founding members of the Young CPAs committee and served as chair for two years before being appointed to the Buffalo Chapter Board and serving as president for the 2003-2004 fiscal year, one of the youngest presidents in the history of the Buffalo Chapter.

Mark was named one of the top 10 of the Top 100 Most Influential People in Accounting by *Accounting Today* in 2015 and has been on the Top 100 list since 2008. Mark has also been named as one of CPA Practice Advisors' 25 Thought Leaders 2012-2014. He was also named to the Global Accounting Power 50 list by *The Accountant Magazine* and the *International Accounting Bulletin* in 2014.

NETWORK LIKE A MILLIONAIRE AND NEVER FORGET A NAME
Presenter: Bob Gray

How often have you bumped into clients, or customers, or someone you know but can't remember his name or hers? Socially, this can be embarrassing, and in business, it can be disastrous. With our lives already so hectic, and the number of people who are important to us increasing every day, we need an instant and easy way to keep each and every one of them active in our memory. The sweetest sound to someone is the sound of his or her name. By recalling a correct name, especially after only one introduction, you will not only engage and flatter its owner, but you will be remembered for your thoughtful interest.

In his amusing, unusual, and empowering presentation, Bob will reveal a wonderful method to easily recall and store into memory the names of new friends and business acquaintances. Having been taught the system, you will quickly and easily be able to recall both first and last names of several new acquaintances as they are introduced during the presentation. It's a hilarious system that will have you in hysterics…and it works.

You will love networking after this session!

BOB GRAY
Memory Edge Corporation
Toronto, Ontario

Bob Gray, now a motivational keynote speaker and memory expert, discovered his first memory technique when he was seven. He was given a magic book that showed him how to remember a twenty-item list. Shortly thereafter, he was called on to 'do the memory trick' at family parties and gatherings.

Encouraged by praise at home, he began to find memory techniques could have a valuable role in other aspects of his life. With a little ingenuity, he adapted the 'memory trick' to help him with his work at school. The reward was a significant rise in his grades.

Years later, Bob immigrated to Canada from his native England. At the time he was working as an entertainer, and he had to prove to Immigration that he wasn't taking a job away from a Canadian. As the Immigration authority quickly learned, he wasn't taking a job away from anyone else in the world! Traveling and entertaining under the stage name of 'Backwards Bob the Memory Man,' Bob demonstrated the unique abilities that have netted him a place in the *Guinness Book of World Records* and a recent appearance on 'Ripley's Believe It Or Not.'

For the first several years after arriving in Canada, he traveled throughout North America, appearing in comedy clubs, colleges, and universities, where he demonstrated his unique abilities in front of tens of thousands of people. Soon however, he decided to take a break from the road and entered the business world. Starting in the fitness industry, he quickly found that by adapting the memory techniques he had been studying and developing over the years, he was able to move ahead in his career faster than he or anyone else had expected. From never losing track of detailed information, to remembering everything about his many clients, including not only their names and occupations, but also the names of their family members, their birthdays, hobbies, and fitness goals. He got the job done with confidence and ease. Along with making a lot of new friends, Bob saw the sales retention of his company increase by 13% in the first year alone.

After teaching his memory techniques to his own sales staff, with highly acclaimed results, there was a phenomenal demand for him to teach his systems to other companies and organizations. At one point, he was invited to share his techniques at a national fitness convention. Because he incorporated his unique brand of humor and the incredible abilities he had developed in his stage days, his presentation was an instant success. From then on, there was no looking back. Bob was again doing what he loved. He was performing. Only this time, he also had the satisfaction of knowing that he was educating his audience as much as, if not more than, entertaining them.

A recognized authority on memory systems, Bob has spent the last 25 years traveling the globe entertaining, keynote speaking, and training corporations, governments, and associations to adapt memory systems for their particular needs. He has developed a series of sales oriented personal development keynotes and workshops, which have been popular on six continents, as well as writing the best-selling book, *Right Brain Rapid Recall*.

His many TV appearances include, ‘Ripley’s Believe It Or Not,’ ABC Regis Philbin, NBC Today Show, CBC, Britain’s BBC 1 and the Steve Harvey Show.

DO THEY DESERVE TO WORK WITH YOU?
GETTING AND KEEPING THE BEST CLIENTS
Presenter: Wendy Nemitz

When growing a professional services practice, decisions are sometimes made about which opportunities to pursue based on revenue rather than ideal fit. The question isn’t always raised, “Is this our ideal client?”

Responding to RFPs is a drag on resources. Losing them is a drag on morale. Winning the wrong ones is a threat to staff retention and efficiency. The emotional pull of getting new business in the door should never override a clear go-to-market strategy.

In her presentation, Wendy has paired down the prospect selection process to three simple questions: Is this a relationship we can commit to and nurture for years? Can we sell them more than one service? What is our defining differentiator based on our competition…and is it enough to win?

During the session, Wendy will discuss developing ideal client profiles (personas) and criteria while defining your firm’s competitive differentiating value. The goals? Select the right clients and keep the great talent. This will be an interactive session where you will delve into the three qualifying questions to understand how they apply to your current clients, pipeline management, RFP decisions, and talent management.

WENDY NEMITZ
Ingenuity Marketing Group, LLC
St. Paul, Minnesota

Wendy Nemitz founded Ingenuity Marketing Group in the early 90s after serving as one of the first in-house accounting marketing directors in the U.S. She is a leading consultant on strategic marketing, branding, media, and growth strategies to accountants, attorneys, and other professional service firms. Wendy holds a Master’s Degree in leadership and travels extensively as a speaker, business development trainer, and leadership coach. Wendy works with executives, marketing and sales teams, and emerging leaders to help them create a whole-firm marketing and business development model that significantly improves results. She is consistently a top-rated consultant for her go-to-market strategies and tips, and was named among the “Rea; Power50” leaders in the Minneapolis/St. Paul market.

PROFESSIONAL LIABILITY CLAIMS STATISTICS AND KEY LOSS DRIVERS
Presenters: Christopher Brammer
Stanley Sterna, JD

This session will include the following topics:

- Claim Types;
- Loss Drivers;
- Choice of Counsel/Litigation Management;
- Best Practices; and
- Professional Liability Coverage Update.

CHRISTOPHER BRAMMER
Aon Affinity
Hatboro, Pennsylvania

Chris Brammer serves as vice president in the professional firms division of Aon Affinity. In his present role, Chris is responsible for identifying and solving complex risk issues for the accounting profession’s largest firms. Solutions are tailored to each client and are provided through a team comprised of Aon colleagues and insurance industry partners. With more than 25 years of insurance industry experience, Chris has served in numerous leadership roles, primarily focused on providing risk solutions to the legal and accounting professionals, and has mentored or trained several individuals who have gone on to assume leadership roles within the insurance industry.

Chris is a certified professional sales trainer through Achieve Global. He has presented to various professional associations, including the Maine State Bar Association, the Association of Legal Administrators, and the CPA Firm Management Association.

STANLEY STERNA, JD
Aon Affinity
Hatboro, Pennsylvania

Stan Sterna serves as vice president in the Professional Firms Division of Aon Affinity. As a claim and risk management consultant, Stan provides quality control, claim/litigation management, and risk control expertise to many of the country’s largest accounting firms. He also supports business planning, client relations, and sales and marketing initiatives for the AICPA Professional Liability Program and Aon’s most valued internal/external business partners.

Since 1990, Stan has specialized in the defense of professionals. He has exclusively handled accountants' professional liability claims since 1998. Before coming to Aon, he served as director of the Accountants Professional Liability Claim Unit for Continental Casualty Company, a CAN company, the nation's largest professional liability carrier for CPAs and underwriter for the AICPA Professional Liability Insurance Program. As director, he was responsible for strategic planning, including claim management, training, business planning, client relations, sales and marketing development, and IT enhancement.

Stan is a frequent lecturer and published author on the subject of accountants' professional liability. He is past winner of the Florida State Society of CPAs "Excellence in Writing Award" and the Florida Magazine Association's "Charlie Award," the association's highest honor. Stan is a member of the Illinois and Federal bar, past vice chair of the Defense Research Institute Professional Liability Committee's Accountants Litigation Group, and member of the American Arbitration Association's Accountants Professional Liability Rules Committee.

TECHNOLOGY UPDATE AND PREDICTIONS FOR 2016
Presenter: David Bergstein, CPA, CGMA

David Bergstein will cover advances in technology, as well as:

- The Cloud: The Good, the Bad, and the Ugly;
- Security: It's Not an Option;
- Advances in Automation and Workflow; and
- Trends to Look for in 2016.

DAVID BERGSTEIN, CPA, CGMA
Intuit
Margate, Florida

Dave Bergstein, CPA, CITP, CGMA, is the strategic account 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, security, among others. In 2015, *Accounting Today* listed him as one of their Top 100 Most Influential People within the accounting industry. He blogs on technology and new ideas in the global information industry, and has a popular Twitter following. Dave helps CPAs understand the true power of cloud accounting services that allow them to become strategic advisors to their clients and increase their revenues and niche specialties.

Dave 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.

Dave 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.

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The individual segments of the program have been developed with the objective of contributing to or increasing the professional competence of participants. These group sessions require only a basic level of knowledge. No advance preparation or other prerequisites are required. Sessions will be presented in the group-live format.

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