

AICPA conference

Accounting Firm Leadership Forum

NOVEMBER 5-6, 2007

Sheraton Wild Horse Pass
Resort & Spa
Chandler (Phoenix), AZ

Register by 9/21/07
SAVE \$50!

Hotel Reservation
Cutoff Date — **10/5/07**

*Space is limited to
encourage high-level
discussions and
peer interaction.*

***Be sure to
register early!***



www.cpa2biz.com/conferences

888.777.7077

Register by 9/21/07 **SAVE \$50!**

Recommended CPE credit: **15.5 (main conference)**

Learn strategic leadership solutions to foster your firm's growth while enhancing your professional development.

Learn how to make your firm an industry leader at this year's **Accounting Firm Leadership Forum**.

With an illustrious lineup of expert speakers and an interactive environment, you'll learn the best practices and strategic techniques to foster your firm's growth — and the growth of your staff. Learn how to create a well-run firm. Discover what it takes to attract better talent. Understand the importance that more satisfied employees generate more satisfied clients — and what you could do back at the office to cultivate that philosophy.

Don't Miss!

Keynote presentation on The State of the Industry, by Allan D. Koltin, PDI Global, Inc.

Strategies for Recruiting, Developing and Retaining Future Leaders

Trends in CPA Firm Mergers & Acquisitions

How to Create a Vision for the Firm

Trends in Partner Compensation

How to Evaluate, Mentor and Grow Talent

In an industry where those in leadership roles are faced with increasing challenges, knowing how to set your firm apart from the rest is key. Don't miss this year's forum! Register today.

Who Should Attend

Managing partners, directors and senior partners in firms of all sizes



Relax in the tranquil beauty of the Arizona landscape.

Located in the rugged Sonoran Desert, surrounded by ancient vistas and scenic mountain tops, stands the luxurious Sheraton Wild Horse Pass Resort & Spa. Enjoy a boat ride along the meandering replica of the Gila River that flows through the resort grounds. Play a round of golf on the 18-hole championship golf course. Pamper yourself at the serene Aji Spa. Or swim in one of the four pools with cascading waterfalls. Here, there's something for everyone to enjoy.

Register by 9/21/07 **SAVE \$50!**

CALL: 1.888.777.7077 FAX: 1.800.870.6611

Conference agenda

**FIELDS OF STUDY: BMO-BUSINESS MANAGEMENT & ORGANIZATION P/HR-PERSONNEL/HR
SKA-SPECIALIZED KNOWLEDGE & APPLICATION**

Topics, Speakers and Fields of Study are subject to change

MONDAY, NOVEMBER 5 MAIN CONFERENCE — DAY ONE

- 7:30 am – 8:30 am** Registration & Continental Breakfast
- 8:30 am – 8:45 am** Welcome and Introductions
Allan D. Koltin, PDI Global, Inc., Chicago, IL
- 8:45 am – 9:30 am** **1 State of the Industry SKA**
Allan D. Koltin, PDI Global, Inc., Chicago, IL
- 9:30 am – 10:45 am** **2 How to Recruit, Develop and Retain Future Leaders P/HR**
Bob Bunting, Moss Adams, Seattle, WA
- 10:45 am – 11:00 am** Break
- 11:00 am – 12:00 pm** **3 The Most Challenging Issues That Require Partner Buy-in SKA**
Carl George, Clifton Gunderson, Peoria, IL
- 12:00 pm – 1:30 pm** Luncheon with Speaker
Generational Issues Facing Today's CPA Firm
Rita Keller, Brady Ware, Dayton, OH
- 1:30 pm – 3:00 pm** **4 Mid-Size Firm Managing Partner Panel: What Are the Three Biggest Challenges You Face in Running Your Firm BMO**
Michael Epstein, Fuller Landau LLP, Toronto, ON
Bruce Malott, Meyners & Company, Albuquerque, NM
Irwin Steinberg, Steinberg Advisors, Northbrook, IL
Bill Tapp, Kirkland Russ Murphy & Tapp, Clearwater, FL
- 3:00 pm – 3:15 pm** Break
- 3:15 pm – 4:45 pm** **5 Large Firm Managing Partner Panel: What Are the Three Biggest Challenges You Face in Running Your Firm BMO**
Andy Armanino, Armanino McKenna, San Ramon, CA
Tracy Gallagher, Tofias, Cambridge, MA
Phil Holthouse, Holthouse Carlin & Van Trigt, Los Angeles, CA
- 4:45 pm – 6:00 pm** **6 Current Trends in CPA Firm Mergers & Acquisitions SKA**
Michael Cohen, J.H. Cohn, Roseland, NJ
Allan D. Koltin, PDI Global, Inc., Chicago, IL

TUESDAY, NOVEMBER 6 MAIN CONFERENCE — DAY TWO

- 7:00 am – 8:00 am** Continental Breakfast
- 8:00 am – 9:20 am** **7 How to Create an Embraceable Vision for Your Firm BMO**
Steve Samek, UHY Advisors, Chicago, IL
- 9:20 am – 9:30 am** Break
- 9:30 am – 10:50 am** Concurrent Sessions
- Select One Concurrent Session
- A1 Current Trends in Partner Compensation BMO**
Michael Cohen, J.H. Cohn, Roseland, NJ
Allan D. Koltin, PDI Global, Inc., Chicago, IL
- B1 The Use of Professional Management to Run a CPA Firm BMO**
Tracy Gallagher, Tofias, Cambridge, MA
Rita Keller, Brady Ware, Dayton, OH

AICPA Accounting Firm Leadership Forum

9:30 am – 10:50 am

(continued)

10:50 am – 11:00 am

11:00 am – 12:20 pm

Select One
Concurrent
Session

12:20 pm – 1:30 pm

1:30 pm – 3:00 pm

3:00 pm

C1 How to Become an Employer of Choice/Best Places to Work Firm P/HR

Michael Epstein, Fuller Landau LLP, Toronto, ON
Nancy Meech, Heinfeld Meech & Co., Phoenix, AZ

Break

Concurrent Sessions

A2 How to Develop and Retain Women Leaders Within the Firm P/HR

Rita Keller, Brady Ware, Dayton, OH
Nancy Meech, Heinfeld Meech & Co., Phoenix, AZ

B2 How to Build a Sales & Marketing Culture Within Your Firm SKA

Jeff Pawlow, The Growth Partnership, St. Louis, MO
Irwin Steinberg, Steinberg Advisors, Northbrook, IL

C2 How to Evaluate, Mentor and Grow Talent P/HR

Bruce Malott, Meyners & Company, Albuquerque, NM
Bill Tapp, Kirkland Russ Murphy & Tapp, Clearwater, FL

Lunch

8 Great Leaders + Great Teams = Great Results BMO

Jeff Pawlow, The Growth Partnership, St. Louis, MO

Conference Adjourns

Compensation as a Strategic Asset: The New Paradigm

Successful firms find ways to hire the best. The authors take you step-by-step through a process that brings together mission, vision, values, strategy, leadership, goal-setting, performance management and compensation.



2007 Paperback

090493

AICPA Member

\$57.00

Nonmember

\$71.25

You may also be interested in:



AICPA Accounting Firm Marketing Forum

November 8–9, 2007

AICPA Boardroom

New York, NY

Registration information

4 Ways to Register Fast

ONLINE*: www.cpa2biz.com/conferences

PHONE*: 1.888.777.7077 or 1.919.402.4500

FAX*: 1.800.870.6611 or 1.919.402.4670

MAIL: Complete and mail the form along with your promotion code to

AICPA Member Service Center, Conferences, 220 Leigh Farm Road, Durham, NC 27707-8110

*Credit card registration only (AICPA VISA® Credit Card, American Express®, Diners Club®, Discover®, MasterCard® or VISA®)



RECOMMENDED CPE CREDIT

Up to 15.5 (main conference)

This conference was prepared in accordance with the Joint AICPA/NASBA Statement on Standards for Continuing Professional Education (CPE) Programs effective on January 1, 2002. The recommended CPE Credits are in accordance with these standards; however, your individual state board is the final authority on the acceptance of programs for CPE credit.



CONFERENCE FEE

Registration fees are determined by current membership status in the PCPS of the AICPA. Please indicate member number on the registration form to obtain the correct discount. Fee for conference includes all sessions, conference materials, continental breakfasts, refreshment breaks and luncheons. Note all registration rates are shown in US \$ Dollars. Registration for groups of 2 or more individuals per organization may qualify for group discounts. Please visit www.cpa2biz.com/conferences for more information. Groups of 10 or more individuals per organization may qualify for additional discounts, please email service@aicpa.org for more information and indicate "Group Conference Sales" in the subject line of your email.

Please note: There is no smoking during the conference sessions.

Suggested attire: Business casual.

Prices and agenda are subject to change without notice.

Program Code: LEAD07



CANCELLATION POLICY

Full refunds will be issued if written cancellation requests are received by 10/15/07. Refunds, less a \$100 administrative fee, will be issued on written requests received before 10/29/07. Due to financial obligations incurred by AICPA, no refunds will be issued on cancellation requests after 10/29/07.

For further information, call AICPA Service Center at 1-888-777-7077.



HOTEL AND GROUND TRANSPORTATION INFORMATION

Contact the hotel directly to obtain their policy on reservations, deposits and cancellations. Rooms will be assigned on a space available basis only. Note, this conference is expected to sell out, so please make hotel arrangements as soon as possible. To receive our special group rates mention that you will be attending the **AICPA Accounting Firm Leadership Forum**.

Sheraton Wild Horse Pass Resort & Spa
5594 West Wild Horse Pass Boulevard
Chandler, AZ 85226

Hotel Phone: (602) 225-0100

Hotel Reservations: (800) 325-3535

Hotel Room Rate: \$229 single/double

Hotel Reservation Cutoff Date: October 5, 2007

Please note: AICPA members are entitled to free membership in the Corporate Preferred Level of the **Starwood Preferred Guest Program (SPG)**; where you can accrue points and qualify for special benefits. If you haven't already done so, we encourage you to sign up today at: <http://www.cpa2biz.com/Affinity/Starwood.htm>.

The Sheraton Wild Horse Pass Resort & Spa is a Starwood Property. Present your SPG membership number upon check-in or when making your reservation to receive valuable Starpoints for your stay.

Ground Transportation — to and from the hotel and airport (please note, rates and times are approximate):

The Sheraton Wild Horse Pass Resort & Spa is located 11 miles from the airport and 15 miles from downtown Phoenix.

Taxi: \$38 each way, 30 minutes

Sedan service: Transportation Inc. \$45.00 per person, 30 minutes. Must be reserved in advance, please call (602) 374-9542 (6 am – 6 pm).

Shuttle: Super Shuttle makes multiple stops, \$15.00, up to 1.5 hours

Hotel Parking: Valet – \$18 per day, Self – complimentary



AIRLINE INFORMATION

The AICPA has a special arrangement with **Maupin Travel, Inc. of North Carolina** to assist you with your travel arrangements. This travel agency may be reached at **1-800-345-5540**. If you prefer to make your own travel plans, be sure to mention the participating airline's reference number (listed below) to take advantage of deeply discounted "Zone Fares" that do not require a Saturday night stay over. Discounts are valid for round trip registered AICPA meetings or conferences only. **Some restrictions may apply.**

American Airlines

1-800-221-2255

Refer to Index #19330

Delta Air Lines

1-800-221-1212

Refer to US723852916

United Airlines

1-800-521-4041

Refer to Meeting ID #53151

For up-to-date airline information regarding special travel discounts, please visit www.cpa2biz.com/conferences.

Due to recent airline industry fare restructuring, we cannot guarantee that the above group travel agreements will be in effect at the time when you are making your travel arrangements. Please contact the airline and/or your travel agency for latest applicable discounts and arrangements.



CAR RENTAL

Hertz Car Rental — **AICPA Member Discounts:** Call 1-800-654-2240 Ref. Code **CV#021H0014**.

Airline and car rental discounts are available only when you or your travel agent book through the 1-800 number. We strongly advise you to confirm your conference registration and hotel reservation prior to making your travel plans. The AICPA is not liable for any penalties incurred if you cancel/change your airline reservations. **Rates are subject to availability.**

Visit www.cpa2biz.com/conferences for more information

AICPA conference

AICPA/CPA2BIZ
220 Leigh Farm Road
Durham, NC 27707

www.cpa2biz.com/conferences

888.777.7077

4 EASY WAYS TO REGISTER

- 1 ONLINE***: www.cpa2biz.com/conferences
- 2 PHONE***: 1.888.777.7077 or 1.919.402.4500
- 3 FAX***: 1.800.870.6611 or 1.919.402.4670
- 4 MAIL***: AICPA Member Service Center, Conferences,
220 Leigh Farm Road, Durham, NC 27707-8110

*Credit Card Registrations Only

SAVE \$50!

Register by 9/21/07

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U.S. POSTAGE
PAID
AICPA/CPA2BIZ

AICPA ACCOUNTING FIRM LEADERSHIP FORUM

POPS members use code **SECTION50** to receive discount.

MEMBERSHIP INFORMATION

Very important — please be sure to complete.

AICPA Member? Yes No
POPS Member? Yes No

Membership No. (Required for discount prices)

NICKNAME FOR BADGE

BUSINESS TELEPHONE

TITLE

EMAIL ADDRESS

REGISTRATION INFORMATION

Please photocopy this form for additional registrants.
If the information on your label is incorrect, please complete the following:

LAST NAME

FIRST NAME

MI

FIRM NAME OR AFFILIATION

STREET ADDRESS

SUITE

PO BOX

CITY

STATE

ZIP

In accordance with the Americans with Disabilities Act,
do you have any special needs? Yes No (if yes, you will be contacted.)

CONFERENCE FEES Please circle appropriate rate.

MAIN CONFERENCE

	PCPS Member \$995	AICPA Member \$1,045	Nonmember \$1,145
<input type="checkbox"/> Early Bird Registration <i>SAVE \$50 by 9/21/07</i>	\$1,045	\$1,095	\$1,195
<input type="checkbox"/> Regular Registration	\$1,045	\$1,095	\$1,195

Total \$ _____ \$ _____

PAYMENT INFORMATION Full payment must accompany registration form.

My check for \$ _____ payable to **AICPA** is enclosed.

OR Please bill my credit card for \$ _____.

AICPA VISA® Credit Card* American Express® Diners Club®
 Discover® MasterCard® VISA®

*If you don't presently have an AICPA VISA® Credit Card, please call **1-866-CPA-VISA** for more information or to apply for the card.

CARD NO. _____

EXP. DATE _____

BILLING NAME _____

SIGNATURE _____

AICPA USE ONLY — LEAD07

CONFERENCE PLANNER

Select one from each time period. To ensure that adequate seating is reserved for the conference sessions, you must complete this section in advance of the conference.

TUESDAY, NOVEMBER 6

9:30 am — 10:50 am

11:00 am — 12:20 pm

Concurrent Sessions

A1 B1 C1

A2 B2 C2

Customer No. _____

Promotion Code _____